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# HYPRO4ST

## D2.1 Relatório sobre as necessidades do mercado de trabalho

### WP2 - Análise das necessidades do mercado de trabalho e desenvolvimento de uma nova certificação profissional



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## Informações sobre o documento

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<b>Descrição do documento</b>	Documento eletrónico público, disponível em EN, EL, HU, HR, PT, IT, SL, que fornece todas as informações sobre as melhores práticas no ensino e formação profissional nos países parceiros e as necessidades do mercado de trabalho do turismo sustentável.			



**Histórico do documento**

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<b>Glossário</b>	
<b>C&amp;D</b>	Comunicação e divulgação
<b>CBE</b>	Órgão Consultivo de Peritos
<b>CD&amp;E</b>	Comunicação, divulgação e exploração
<b>CDP</b>	Plano de comunicação e divulgação
<b>D</b>	Entrega
<b>EACEA</b>	Agência de Execução relativa à Educação, ao Audiovisual e à Cultura
<b>CE</b>	Comissão Europeia
<b>ECVET</b>	Sistema Europeu de Créditos do Ensino e Formação Profissionais
<b>EL</b>	Grécia / Grego
<b>EN</b>	Inglês
<b>EQAVET</b>	Quadro de Referência Europeu de Garantia da Qualidade para o Ensino e a Formação Profissionais
<b>QEQ</b>	Quadro Europeu de Qualificações
<b>UE</b>	União Europeia
<b>FGs</b>	Grupos de discussão
<b>GA</b>	Acordo de subvenção
<b>RGPD</b>	Regulamento Geral sobre a Proteção de Dados
<b>HI</b>	Ensino superior
<b>HES</b>	Instituições de ensino superior
<b>RH</b>	Croácia / Croata
<b>HU</b>	Hungria / Húngaro
<b>TIC</b>	Tecnologias da informação e da comunicação
<b>TI</b>	Itália / Italiano
<b>KPIs</b>	Indicadores-chave de desempenho
<b>L&amp;D</b>	Aprendizagem e desenvolvimento
<b>LP</b>	Chefe de equipa
<b>M</b>	Mês
<b>EM</b>	Marco histórico
<b>N.S.</b>	Não especificado
<b>OER</b>	Recursos educativos abertos
<b>PC</b>	Coordenador de projetos



<b>PM</b>	Gestão de projetos
<b>PT</b>	Portugal / Português
<b>PU</b>	Público
<b>QAC</b>	Comité de Garantia da Qualidade
<b>R</b>	Relatório
<b>ODS</b>	Objetivos de Desenvolvimento Sustentável
<b>SI</b>	Eslovénia / Esloveno
<b>PME</b>	Pequenas e médias empresas
<b>TBU</b>	A atualizar
<b>EFP</b>	Ensino e formação profissional
<b>VLH</b>	Centro Virtual de Aprendizagem
<b>VOOC</b>	Curso Vocacional Aberto online
<b>WBL</b>	Aprendizagem em contexto de trabalho
<b>WP</b>	Pacote de trabalho



## **Resumo executivo**

O projeto HyPro4ST, financiado pelo Programa Erasmus+, procura ter um impacto social e sustentável positivo no sector do turismo. Visa desenvolver um novo perfil profissional para o sector do turismo sustentável intitulado "Gestor de projetos sustentáveis e híbridos", melhorando as competências dos profissionais na gestão de projetos sustentáveis, híbridos, digitais, criativos e de empreendedorismo, ajudando a atenuar a perda de postos de trabalho, as desigualdades entre outros riscos, construindo uma reserva de talentos que o sector do turismo possa explorar para um crescimento futuro.

Para desenvolver o perfil profissional do "Gestor de Projetos Híbridos e Sustentáveis", foi realizada uma análise do mercado de trabalho em todos os países parceiros (Croácia, Grécia, Hungria, Itália, Portugal, Eslovénia) para avaliar as necessidades do mercado e definir a situação atual. Todo o trabalho da Tarefa 2.2 Identificação das Necessidades do Mercado de Trabalho foi preliminarmente organizado através de diretrizes específicas.

O relatório que se segue contém uma breve introdução ao tema, bem como a elaboração da metodologia que foi seguida para a recolha e análise de dados.

O relatório inclui uma secção de resultados e discussão onde são apresentados os estudos quantitativos e qualitativos. Na realidade, a análise das necessidades foi feita através de uma abordagem quantitativa e qualitativa. No primeiro caso, o método de inquérito utilizou um questionário online administrado a mais de 300 interessados. No segundo caso, a pesquisa qualitativa seguiu dois caminhos: para cada país, por um lado, foi realizado um grupo de discussão e entrevistas (com um total de 37 peritos envolvidos) e, por outro, uma pesquisa documental em documentos adquiridos de fontes indiretas. Por conseguinte, foi analisada uma quantidade considerável de textos técnicos e científicos, tanto durante a preparação das perguntas para o questionário e para as entrevistas, como durante a pesquisa documental.

A identificação de 15 boas práticas completou o trabalho de investigação.

No final do relatório, são enumeradas várias conclusões e recomendações com base na investigação e análise efetuadas. As principais podem ser resumidas da seguinte forma: as práticas turísticas do mundo contemporâneo estão hoje muito centradas nos temas da sustentabilidade, da responsabilidade e da ética; o desenvolvimento das tecnologias digitais tornou-se também um tema crucial; as mudanças em curso no mundo produtivo e na indústria do turismo exigem maiores competências profissionais baseadas em estratégias e flexibilidade. Por isso, é cada vez mais importante assegurar uma abordagem de gestão da produção e distribuição dos serviços turísticos. Atualmente, o desenvolvimento destas competências não é adequadamente apoiado pelo sistema de formação. A criação e consolidação de um perfil avançado e transversal, como o do "Gestor de Projetos Sustentáveis e Híbridos", pode representar uma resposta eficaz à procura da mudança que a sociedade moderna exige.



## **1. Introdução**

O objetivo do Relatório das Necessidades do Mercado de Trabalho D2.1 é implementar uma Análise das Necessidades, inicialmente em cada país participante (Grécia, Eslovénia, Croácia, Itália, Hungria e Portugal), utilizando métodos de investigação quantitativos e qualitativos. O objetivo é mapear as lacunas de competências nos domínios da gestão de projetos híbridos, e sustentáveis no sector do turismo, da digitalização, das competências de resiliência (soft skills) necessárias no sector, bem como os melhores métodos de formação para a realização das formações. Este relatório inclui os resultados, todas as informações necessárias e as conclusões dos relatórios nacionais de análise das necessidades.

Os principais objetivos do relatório são os seguintes:

- a identificação das necessidades de mão de obra e do défice de competências no sector do turismo em cada país participante e a nível europeu;
- a identificação e o resumo das melhores práticas adotadas noutros programas de formação profissional e académica nos domínios acima referidos.

Durante o processo, foram envolvidas 364 pessoas (pelo menos 50 por país) para garantir a igualdade de representação e a validade dos resultados.

O relatório fornece toda a informação relevante necessária para que o consórcio, em cooperação com os parceiros associados, o Órgão Consultivo de Peritos (OCP) e os Grupos de trabalho (FG) nacionais, desenvolvam o novo perfil profissional do "Gestor de Projetos Híbridos e Sustentáveis" para o sector do turismo sustentável, bem como um novo padrão de qualificação para este perfil e o material de formação para a educação destes gestores de projeto, que irá responder às necessidades de competências do mercado de trabalho.

De acordo com as diretrizes metodológicas fornecidas para a realização do T2.2, todos os parceiros realizaram a análise das necessidades nos seus países. Cada relatório nacional foi desenvolvido tendo em conta os documentos preparados pela ConfesercentiPA, enquanto Chefe de equipa (LP) responsável pela Tarefa, com a contribuição de todos os parceiros. Mais precisamente, os documentos desenvolvidos foram:

- Introdução metodológica;
- Esboço das perguntas para o questionário e os FGs/entrevistas;
- Diretrizes para a investigação documental;
- Guia do modelo de relatório nacional.

Para mais informações sobre os documentos desenvolvidos, ver Anexo A.

Todos os relatórios nacionais foram enviados para o chefe de equipa (LP), a fim de integrar o material e formular o relatório final. Por conseguinte, o relatório final representa simultaneamente uma síntese dos relatórios nacionais elaborados pelos parceiros e um instrumento operacional resultante da análise das necessidades.



## 2. Metodologia, resultados e discussão

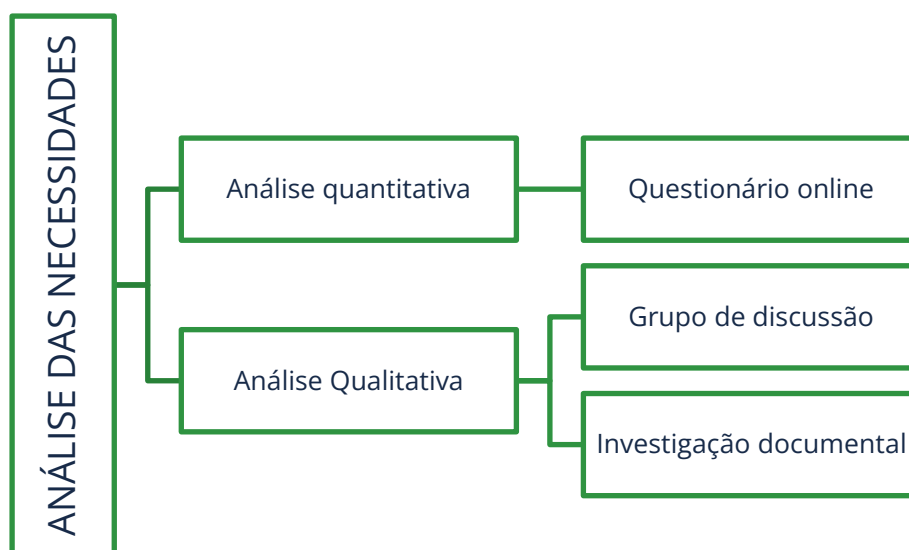
A análise das necessidades de cada país foi realizada segundo uma abordagem quantitativa e qualitativa. As atividades relacionadas com a tarefa envolvem:

1. uma análise quantitativa, efetuada através de um inquérito online (ver Anexo B);
2. uma análise qualitativa, efetuada através de:
  - entrevistas principalmente com os membros dos FG nacionais;
  - uma investigação documental.

As entrevistas foram também alargadas de modo a incluir as respostas dos membros do CBE.

Os resultados do inquérito (questionários) e da pesquisa documental foram consistentemente relatados no relatório nacional, seguindo as orientações sugeridas pelo chefe de equipa do T2.2 e o modelo acordado pelo consórcio.

O padrão adotado para a recolha e análise de dados afigurou-se coerente e operacional e o método que combina a abordagem qualitativa e quantitativa foi particularmente eficaz. De facto, foi utilizado um método misto e convergente, que permitiu aos investigadores canalizar os dados para um único quadro interpretativo, de modo a obter uma análise mais abrangente dos fenómenos (Creswell J. W., 2009; Creswell & Cresswell, 2018).



**Figura 1: O quadro da análise das necessidades**

### 2.1 Análise quantitativa

O questionário online bem utilizado consistia em perguntas de inquérito fechadas que apoiavam a recolha de dados numéricos, através da utilização do método CAWI (Computer

Assisted Web Interviewing). O layout do questionário online foi organizado utilizando "ramificações inteligentes" para reduzir a complexidade.

A ferramenta Google Forms foi utilizada para recolher as respostas do questionário online, que incluía 21 perguntas dos seguintes tipos

- Dicotómico;
- Escolha múltipla;
- Estilo de lista de verificação (caixas de verificação);
- Escala de Likert (escala linear);
- Classificação (grelha de escolha múltipla).

O questionário online era composto pelas seguintes secções:

- Introdução (fornecer informações sobre o projeto e o objetivo do inquérito);
- Dados dos inquiridos (sector de atividade, cargo, faixa etária, sexo);
- Sustentabilidade, competências e formação nos sistemas de turismo (incluindo questões relativas a estes domínios);
- O perfil Híbrido de Gestão de Projetos (incluindo perguntas que ajudam a definir as competências do novo perfil);
- Comunicação final (dados pessoais das pessoas que desejam ser informadas sobre a evolução do projeto).

O questionário foi partilhado com os grupos-alvo do projeto (gestores de topo; gestores de projeto; gestores de recursos humanos; proprietários de empresas; empresários; professores universitários; formadores de EFP/Adultos; profissionais de turismo; outros) através de:

- boletins informativos e/ou mensagens/mensagens eletrónicas personalizadas;
- publicações nas páginas das redes sociais do projeto e/ou dos parceiros.

Para analisar os dados quantitativos, foram utilizadas estatísticas descritivas para os resumir e organizar de forma a serem facilmente compreendidos. Além disso, foram utilizadas a análise de tabulação cruzada (a utilização de tabelas de dados que apresentam os resultados dos inquiridos) e a análise de corte (identificação de grupos de inquiridos que partilham características comuns) (HubSpot, 2021; ScienceDirect, n.d.). Embora o Google Forms ofereça resumos automáticos das respostas e representação gráfica dos dados das respostas, estes não foram considerados adequados e, como os inquéritos foram traduzidos para as línguas dos parceiros, não puderam ser utilizados nos relatórios nacionais. Por conseguinte, outras ferramentas, como o Excel ou outros programas de análise estatística, foram as principais ferramentas utilizadas para o tratamento dos dados.





## 2.2 Análise qualitativa

A recolha de dados qualitativos foi utilizada para obter conhecimentos pormenorizados, subjetivos e individuais sobre vários tópicos.

Os métodos utilizados para recolher os dados para a investigação qualitativa foram os seguintes

- Entrevistas: os membros dos FG nacionais e/ou do CBE foram entrevistados utilizando as 23 perguntas abertas preparadas e assinadas pelo consórcio, centradas nos tópicos:
  - Sustentabilidade, competências e formação nos sistemas de turismo;
  - O perfil da Gestão de Projetos Híbridos;
  - Melhores práticas

As entrevistas foram realizadas individualmente ou em grupo e principalmente online (através da plataforma Zoom), uma vez que não foi possível reunir todos os membros dos grupos acima referidos num local ao mesmo tempo. As respostas foram registadas utilizando o método de tomada de notas.

- Pesquisa de literatura científica baseada em revisão, orientada pelas 23 perguntas abertas utilizadas durante a implementação das entrevistas:
  - Investigação documental interna: parte da informação foi gerada internamente nas organizações;
  - Investigação documental externa: este tipo de investigação refere-se à investigação efetuada fora dos limites da organização.

Os recursos externos utilizados são descritos a seguir:

- Pesquisa documental online: dados disponíveis online na Internet recolhidos através da pesquisa direta de informações específicas em plataformas que disponibilizam artigos científicos e em sítios industriais, de marketing ou comerciais, utilizando motores de busca. A pesquisa foi refinada de forma a que, os resultados fossem promissores, exatos e relevantes.
- Sítios Web dos prestadores de EFP e das universidades/faculdades: os dados foram recolhidos através do acesso aos seus sítios Web e/ou através de entrevistas/discussões com profissionais que trabalham nestas organizações.
- Dados publicados pelo governo: Ministérios da Educação e do Turismo.

Os métodos de análise de dados qualitativos (Hotjar, 2023) basearam-se na análise de conteúdo, que se refere ao processo de categorização de dados verbais ou comportamentais para classificar, resumir e tabular os dados, e na análise do discurso, que é um método de análise da conversa que ocorre naturalmente e de todos os tipos de texto escrito.



### **3. Investigação primária**

#### **3.1 Investigação primária (quantitativa): O questionário**

##### ***3.1.1 Informações técnicas relativas ao inquérito***

O questionário foi estruturado como um teste exploratório e utilizado para recolher e tratar dados qualitativos. Inclui 21 perguntas e não deve demorar mais de 10-15 minutos para ser preenchido, tempo considerado moderadamente adequado para não envolver demasiado o inquirido. O inquérito foi realizado online utilizando o Google Forms. Em alguns casos, o questionário foi também administrado aos participantes no grupo de discussão, por vezes de forma híbrida (questionário e entrevista). Os resultados também foram tratados através de infografias.

##### ***3.1.2 Composição da amostra***

A composição da amostra (N=364) parece ser equilibrada, representativa das categorias que operam principalmente no sector do turismo. O sector privado é a categoria mais representada, seguido dos sectores público e educativo e das ONG. A faixa etária mais representada é a dos 35-49 anos. O inquérito envolveu principalmente inquiridos do sexo feminino.



**Tabela 1: Características sócio psicológicas da amostra**

País	Respostas	Sector empresarial	Categorias de emprego	Grupos etários	Género
<b>Croácia</b>	69	Privado: 35% <b>Público: 41%</b> ONG: 11% Educação: 10% Outros: 3%	<b>Representantes dos conselhos de turismo: 23%</b> Gestores e empresários do sector da restauração e do alojamento: 19%. Outros intervenientes relevantes no sector do turismo: 9%. Professores do ensino superior: 10% Gestores de projetos: 7%	18-24: 6% 25-34: 16% <b>35-49: 55%</b> 50-64: 20% 65-74: 3% 75+: 0%	<b>Feminino: 70%</b> Homem: 30% Homem transexual: 0%. Mulher transexual: 0% Não binário: 0% Recusa de resposta: 0% Outros: 0%
<b>Grécia</b>	55	<b>Privado: 62%</b> Público: 16% ONG: 4% Educação: 13% Outros: 5%	<b>Profissional do sector da hotelaria e restauração: 24%</b> Empresário: 16% Administração/apoio a escritórios: 11% Formador de adultos: 9% Prestador de ensino e formação profissional: 5% Gestor de projetos: 9%. Gestor de destinos: 2% Estudante: 5% Organizador de viagens: 4% Serviços de apoio às empresas: 2% Outros: 13%	18-24: 5% 25-34: 11% <b>35-49: 55%</b> 50-64: 27% 65-74: 2% 75+: 0%	<b>Mulheres: 58%</b> Homem: 40% Homem transexual: 0%. Mulher transexual: 0% Não binário: 0% Recusa de resposta: 2% Outros: 0%

D2.1 Relatório sobre as necessidades do mercado de trabalho

País	Respostas	Sector empresarial	Categorias de emprego	Grupos etários	Género
<b>Hungria</b>	51	<b>Privado: 39%</b> Público: 12% ONG: 23,5% Educação: 26,5% Outros: 0%	Os 4 maiores grupos foram: Empresário: 17.6% Formador de adultos: 15,7% Gestor de projetos: 13,7% Organizador de viagens: 11.8%	18-24: 2% 25-34: 18% <b>35-49: 51%</b> 50-64: 21% 65-74: 8% 75+: 0%	<b>Mulheres: 55%</b> Homens: 43% Homem transexual: 0%. Mulher transexual: 0% Não binário: 2% Recusa de resposta: 0% Outros: 0%
<b>Itália</b>	51	<b>Privado: 45,1%</b> Público: 15.7% ONG: 17,6% Educação: 11,7% Outros: 9.9%	Agência de viagens: 21,6% Empresário: 19.6% Diretor: 11,8% Gestor de destinos: 9,8% Docente do ensino superior: 5,9% formador: 3.9% Professor universitário: 3.9% <b>Outros: 23,5%.</b>	18-24: 2% 25-34: 29% <b>35-49: 37%</b> 50-64: 20% 65-74: 12% 75+: 0%	Mulheres: 41% <b>Homens: 59%</b> Homem transexual: 0%. Mulher transexual: 0% Não binário: 0% Recusa de resposta: 0% Outros: 0%

País	Respostas	Sector empresarial	Categorias de emprego	Grupos etários	Género
<b>Portugal</b>	87	<b>Privado: 97%</b> Público: 3% ONG: 0% Educação: 0% Outros: 0%	<b>Empresários: 41%</b> Profissionais do sector do alojamento/hospitalidade: 20%. Gestores de projetos, gestores de agências de viagens, operadores turísticos e profissionais dos serviços de apoio às empresas: 39%	18-24: 2% 25-34: 5% <b>35-49: 58%</b> 50-64: 31% 65-74: 3% 75+: 1%	<b>Mulheres: 55%</b> Homens 44% Homem transexual: 0%. Mulher transexual: 0% Não binário: 0% Não responderam: 1% Outros: 0%
<b>Eslovénia</b>	51	<b>Privado: 39%</b> Público: 25% ONG: 4% Educação: 22% Outros: 10%	<b>Gestor de projetos: 16%</b> <b>Estudante: 16%</b> Professor do Ensino Superior: 14% Administrador/apoio de escritório: 10% Empresários: 8% Gestor do destino: 6% Formador de adultos: 6%. Outros: 14%	18-24: 14% 25-34: 23% <b>35-49: 53%</b> 50-64: 10% 65-74: 0% 75+: 0%	<b>Mulheres: 76%</b> Homens: 24% Outros: 0% Homem transexual: 0%. Mulher transexual: 0% Não binário: 0% Recusa de resposta: 0%

Os quadros seguintes apresentam as perguntas do questionário e as principais respostas recolhidas através do tratamento dos dados. Por "principais" referimo-nos às respostas mais recorrentes e com maior percentagem de concordância. Por conseguinte, o quadro tem um valor indicativo e só pode ser considerado útil para definir uma representação geral da dinâmica que caracteriza os sistemas turísticos e para destacar as questões consideradas mais importantes pelos inquiridos. Para uma visão mais pormenorizada das respostas, consultar o questionário completo.

**Tabela 2: Perguntas e respostas predominantes do questionário da secção 1. Sustentabilidade, competências, formação nos sistemas de turismo**

Não	Questão	Respostas predominantes
1	Que ações concretas deveria a sua organização implementar para tornar as práticas turísticas mais sustentáveis?	<ul style="list-style-type: none"> <li>- Ações para combater/mitigar as alterações climáticas: 21,3%</li> <li>- Ações de conservação da biodiversidade: 19%</li> <li>- Ações para desenvolver a economia circular: 18,2%</li> <li>- Ações para melhorar a gestão e as finanças: 15%.</li> </ul>
2	Quais são, na sua opinião, as razões pelas quais a sua organização aborda ou poderia abordar questões de sustentabilidade?	<ul style="list-style-type: none"> <li>- Alinhar-se com os nossos objetivos, missão e valores: 21%</li> <li>- Satisfazer as expectativas dos consumidores/clientes: 17.7%</li> <li>- Desenvolver novas oportunidades de crescimento: 17%</li> <li>- Melhorar a eficiência operacional: 13%</li> </ul>
3	Quais das seguintes ações de sustentabilidade social devem ser consideradas prioritárias?	<ul style="list-style-type: none"> <li>- Garantir a segurança no local de trabalho: 19,2%</li> <li>- Promoção do emprego dos jovens, nomeadamente das mulheres jovens: 18,4%.</li> <li>- Promoção de um ambiente geral de tolerância zero em relação à violência e ao assédio, incluindo a violência baseada no género: 17.6%</li> <li>- Inclusão de trabalhadores com deficiência na força de trabalho do turismo: 13,1%</li> </ul>
4	Quais das seguintes ações/medidas devem ser implementadas para revitalizar o sector do turismo?	<ul style="list-style-type: none"> <li>- Competências, educação e formação: 19,3%</li> <li>- Transição verde: 17.5%</li> <li>- Envolvimento das comunidades locais: 17.5%</li> <li>- Transição digital e tecnologias inteligentes: 13%</li> </ul>
5	Quais das seguintes competências e capacidades são as mais importantes para as pessoas que querem trabalhar no sector do turismo?	<ul style="list-style-type: none"> <li>- Flexibilidade e adaptabilidade: 20,7%</li> <li>- Foco no cliente: 20,1%</li> <li>- Criatividade e inovação: 18.9%</li> <li>- Capacidade de trabalhar em equipa: 16.5%</li> </ul>
6	Qual das seguintes competências ambientais deve ser implementada para melhorar a competitividade dos sistemas turísticos?	<ul style="list-style-type: none"> <li>- Capacidade de gerir os resíduos, as águas residuais, a reciclagem e a compostagem: 20,8%</li> <li>- Promoção de atividades e produtos respeitadores do ambiente: 19.9%</li> <li>- Capacidade para minimizar o consumo e maximizar a eficiência energética e hídrica: 19.1%</li> <li>- Promoção de formas de transporte sustentáveis: 15.2%</li> </ul>
7	Quais das seguintes competências digitais devem ser implementadas para melhorar a competitividade dos sistemas de turismo?	<ul style="list-style-type: none"> <li>- Competências de marketing e comunicação online: 26.3%</li> <li>- Competências em redes sociais: 17.9%</li> <li>- Competências em matéria de análise de dados, inteligência empresarial e grandes volumes de dados: 13.9%</li> <li>- Competências de desenvolvimento de sítios Web: 10.8%</li> </ul>

Não	Questão	Respostas predominantes
8	Em qual das seguintes áreas do empreendedorismo gostaria de melhorar as suas competências?	<ul style="list-style-type: none"> <li>- Desenvolvimento de estratégias de marketing: 18.7%</li> <li>- Criatividade e inovação: 16.1%</li> <li>- Metodologia de design thinking para o desenvolvimento de produtos/serviços/experiências centrados no cliente: 15.8%</li> <li>- Desenvolvimento da estratégia empresarial: 13.6%</li> <li>- Desenvolvimento de estratégias de marca: 13.5%</li> </ul>
9	Quais das seguintes competências transversais acha que precisa de melhorar?	<ul style="list-style-type: none"> <li>- Gestão da mudança: 11%</li> <li>- Comunicação: 9,9%</li> <li>- Liderança: 9,6%</li> <li>- Lançamento de ideias: 9,5%</li> <li>- Networking: 9,2%</li> </ul>
10	Qual é a forma mais eficaz de formar um profissional de turismo?	<ul style="list-style-type: none"> <li>- Tutores no trabalho: 33.5%</li> <li>- Formação presencial: 28,3%</li> <li>- Aprender fazendo: 26,9%</li> </ul>

**Tabela 3: Perguntas e respostas predominantes do questionário da Secção 2. O perfil da Gestão Híbrida de Projetos**

Não	Questão	Respostas predominantes
1	Quais das seguintes práticas utiliza para realizar as suas tarefas diárias?	<ul style="list-style-type: none"> <li>- Não aplico nenhuma destas práticas: 40.6%</li> <li>- Indicadores-chave de desempenho para medir a qualidade, o impacto e o sucesso: 23.8%</li> <li>- Modelos específicos de gestão de projetos: 23.1%</li> </ul>
2	Indique em que medida utiliza os seguintes processos para executar os seus projetos e/ou realizar as suas tarefas diárias	<ul style="list-style-type: none"> <li>- Gestão do tempo do projeto→ Muito: 48,4%</li> <li>- Gestão dos custos do projeto→ Muito: 45,3%</li> <li>- Projeto Gestão de Recursos Humanos→ Muito: 40,7%</li> <li>- Gestão das comunicações do projeto→ Até certo ponto: 47%</li> <li>- Gestão dos riscos do projeto→ Até certo ponto: 45.9%</li> <li>- Gestão da integração de projetos→ Até certo ponto: 45.6%</li> <li>- Gestão da qualidade do projeto→ Até certo ponto: 44.2%</li> <li>- Gestão do âmbito do projeto→ Até certo ponto: 42.6%</li> <li>- Gestão das aquisições de projetos→ Até certo ponto: 40.7%</li> </ul>
3	Considera que é mais vantajoso para uma empresa de turismo ser flexível, gerir a mudança e seguir o mercado do que aplicar um planeamento a médio-longo prazo?	<ul style="list-style-type: none"> <li>- Concordo: 34,9%</li> <li>- Concordo plenamente: 32,7%</li> </ul>
4	Na sua organização, a abordagem à gestão de projetos (ou seja, a utilização de conhecimentos, competências, ferramentas e técnicas específicas para fornecer algo de valor às pessoas) é:	<ul style="list-style-type: none"> <li>- Abordagem híbrida: 26,1%</li> <li>- Abordagem ágil: 25,3%</li> <li>- Abordagem Lean: 16,5%</li> <li>- Abordagem em cascata: 15,7%</li> </ul>
5	Indique se e em que medida a sua organização utiliza as seguintes metodologias de gestão de projetos na execução de projetos/operações	<ul style="list-style-type: none"> <li>- Metodologia em cascata→ Até certo ponto: 36.3%</li> <li>- Metodologia Ágil→ Até certo ponto: 31.3%</li> <li>- Metodologia híbrida→ Até certo ponto: 29.4%</li> </ul>

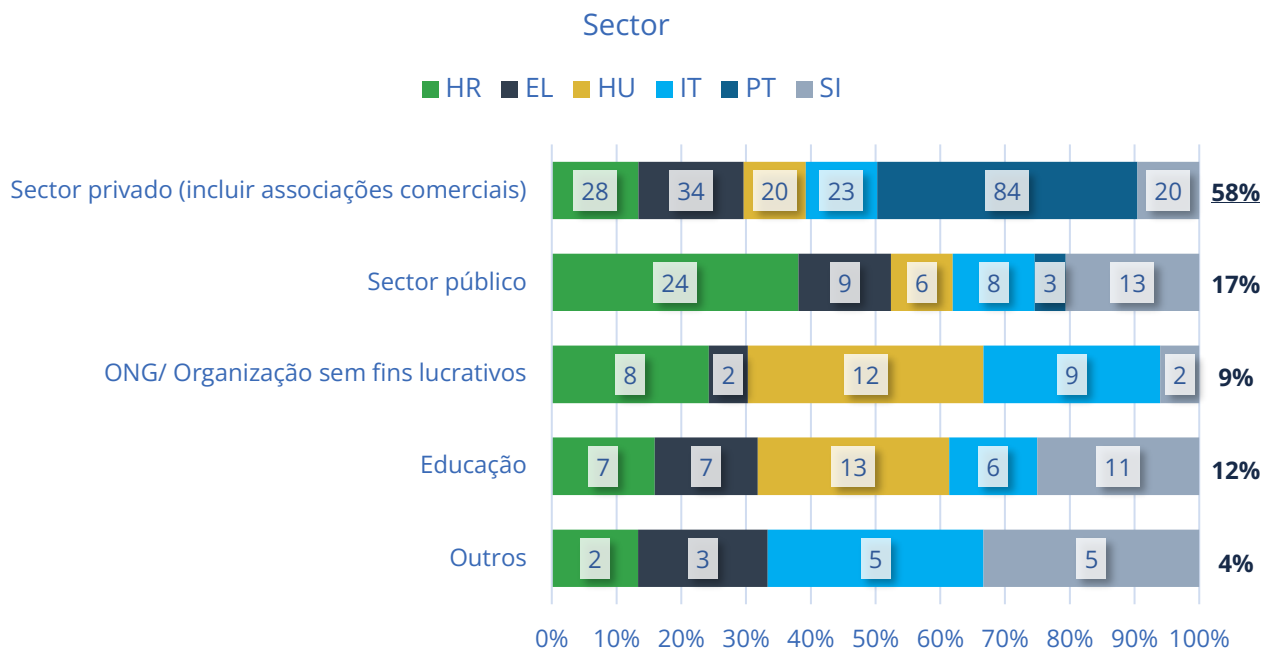
Não	Questão	Respostas predominantes
	quotidianas: Metodologia de gestão de projetos: princípios, ferramentas e técnicas utilizados para planear, executar e gerir projetos.	<ul style="list-style-type: none"> <li>- PRINCE2→ De modo algum: 39,6%</li> <li>- Extreme Programming (XP)→ De modo algum: 33,8%</li> <li>- Seis Sigma→ De modo algum: 33,8%</li> <li>- Metodologia Kanban→ De modo algum: 33%</li> <li>- Gestão de projetos da cadeia crítica (CCPM)→ De modo algum: 31,3%</li> <li>- Metodologia Lean→ De modo algum: 31,3%</li> <li>- Metodologia Scrum→ De modo algum: 31,3%</li> <li>- Project Management Body of Knowledge (PMBOK)→ de modo algum: 30,2%</li> <li>- Método do caminho crítico (CPM)→ De modo algum: 30,2%</li> <li>- Metodologia PM Verde→ De modo algum: 25,8%</li> </ul> <p>Nota: Não sei / Não estou familiarizado com estes termos→ 30-50%</p>
6	Na sua opinião, um gestor de projetos híbridos, capaz de implementar um planeamento eficaz mas também de se adaptar rapidamente às mudanças, pode ser considerado um recurso competitivo para as empresas turísticas e para os organismos públicos responsáveis pelas políticas de turismo?	<ul style="list-style-type: none"> <li>- Concordo: 38,5%</li> <li>- Concordo plenamente: 31,9%</li> </ul>
7	A sua organização inclui no seu organigrama um posto de trabalho oficial intitulado "Gestor de projeto"?	<ul style="list-style-type: none"> <li>- Não: 61,8%</li> </ul>
8	Indique se concorda com a seguinte afirmação: "As minhas competências de gestão de projetos são satisfatórias".	<ul style="list-style-type: none"> <li>- Concordo: 45,3%</li> <li>- Não sei: 29,9%</li> </ul>
9	Tem alguma certificação em gestão de projetos?	<ul style="list-style-type: none"> <li>- Não: 86,3%</li> </ul>
10	Estaria interessado em participar numa ação de formação gratuita intitulada "Gestão de projetos híbridos sustentáveis para o sector do turismo"?	<ul style="list-style-type: none"> <li>- Sim: 74,5%</li> </ul>
11	Em caso afirmativo, especificar porquê:	<ul style="list-style-type: none"> <li>- Quero melhorar os meus conhecimentos atuais: 63,8%</li> <li>- Quero aprender algo novo: 29,9%</li> </ul>

### 3.1.3 Resultados a nível europeu

Com base nos resultados extraídos dos relatórios nacionais (N=364) e nos dados recolhidos através dos inquéritos online, os gráficos abaixo descrevem a situação do mercado de trabalho até à data nos países parceiros.

A grande maioria dos inquiridos trabalha no sector privado, seguido do sector público, do sector da educação e, por último, do sector não governamental. É de notar que 15 dos inquiridos indicaram que trabalham num sector diferente.





**Gráfico 1: Sectores de trabalho dos inquiridos**

A maioria dos inquiridos descreve a sua função atual como Empresários e Gestores de Projetos.

Emprego / Função

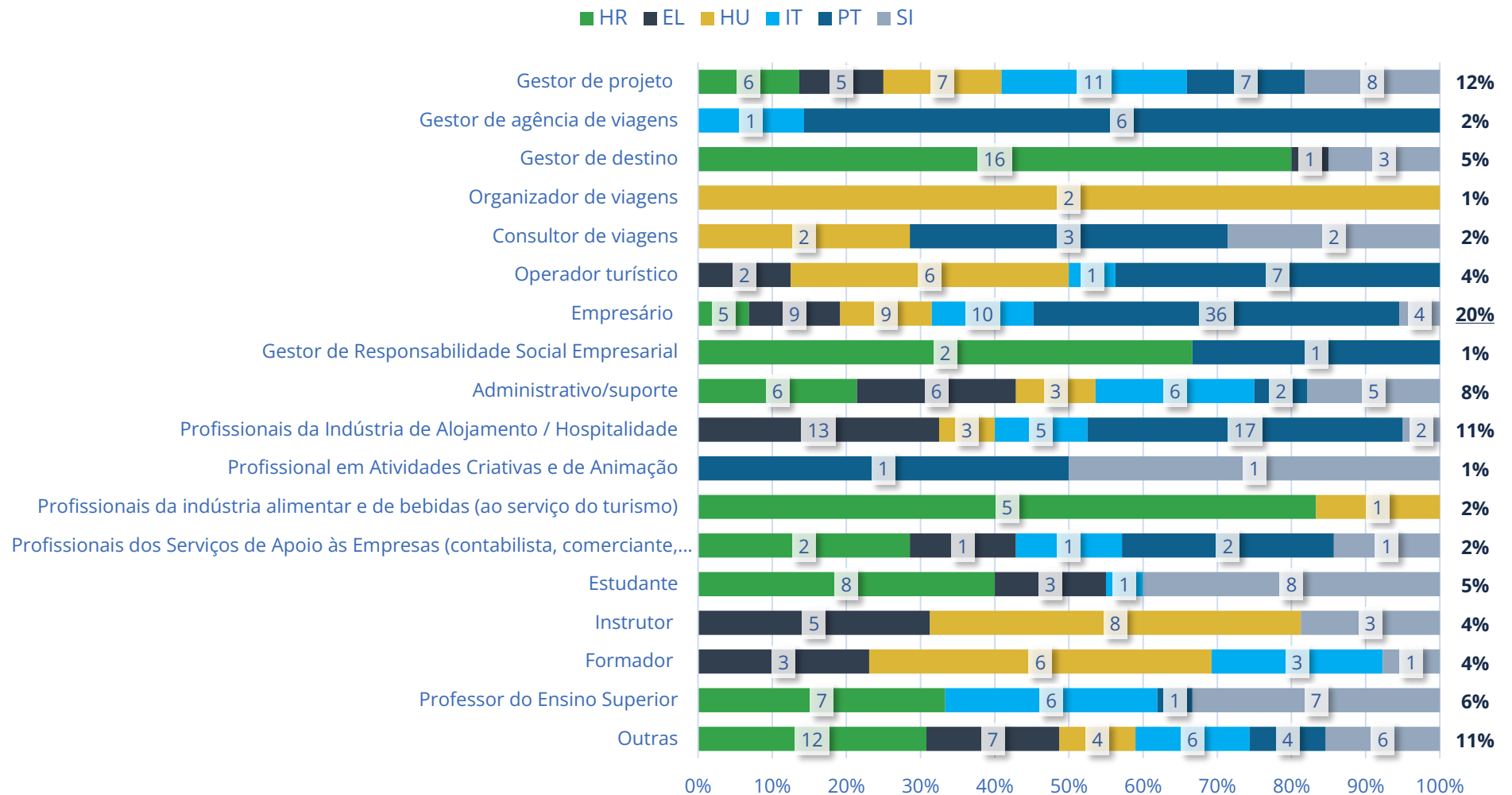
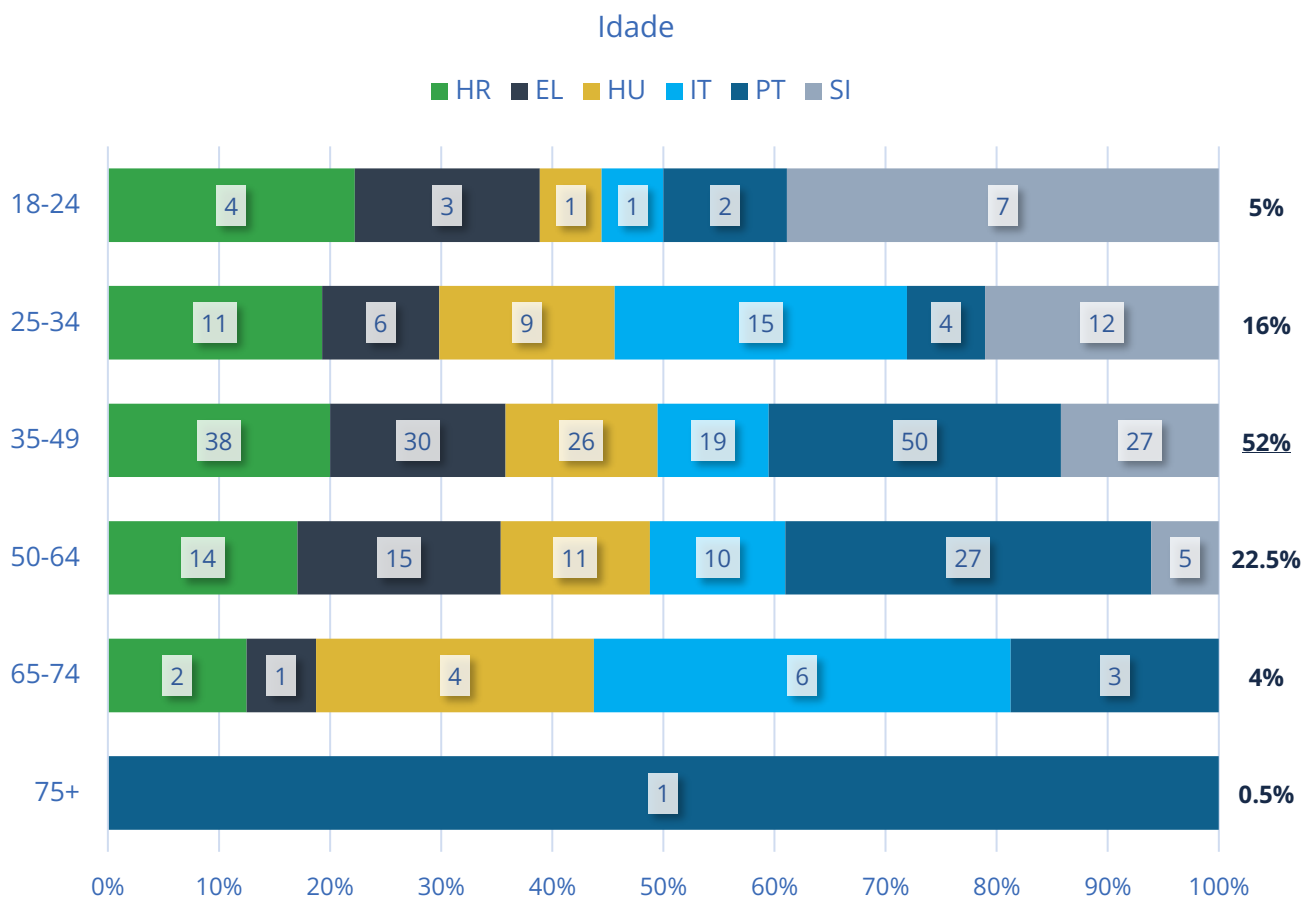
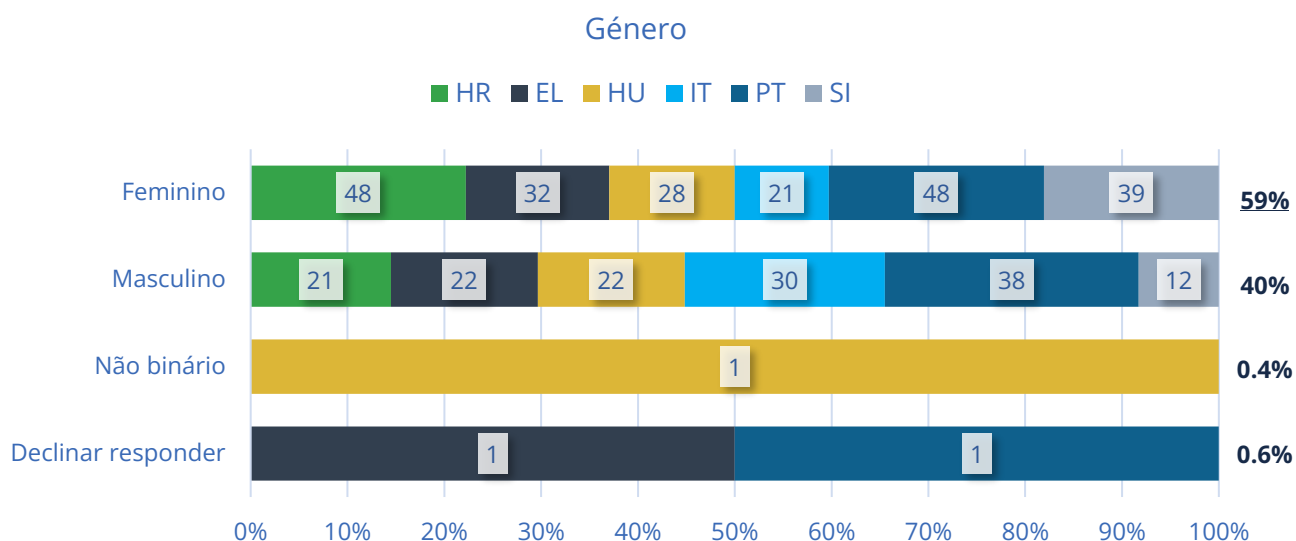


Gráfico 2: Emprego/funções atuais dos inquiridos

Os dois principais grupos etários são os 30-49 (52%) e os 50-64 (22%) anos.



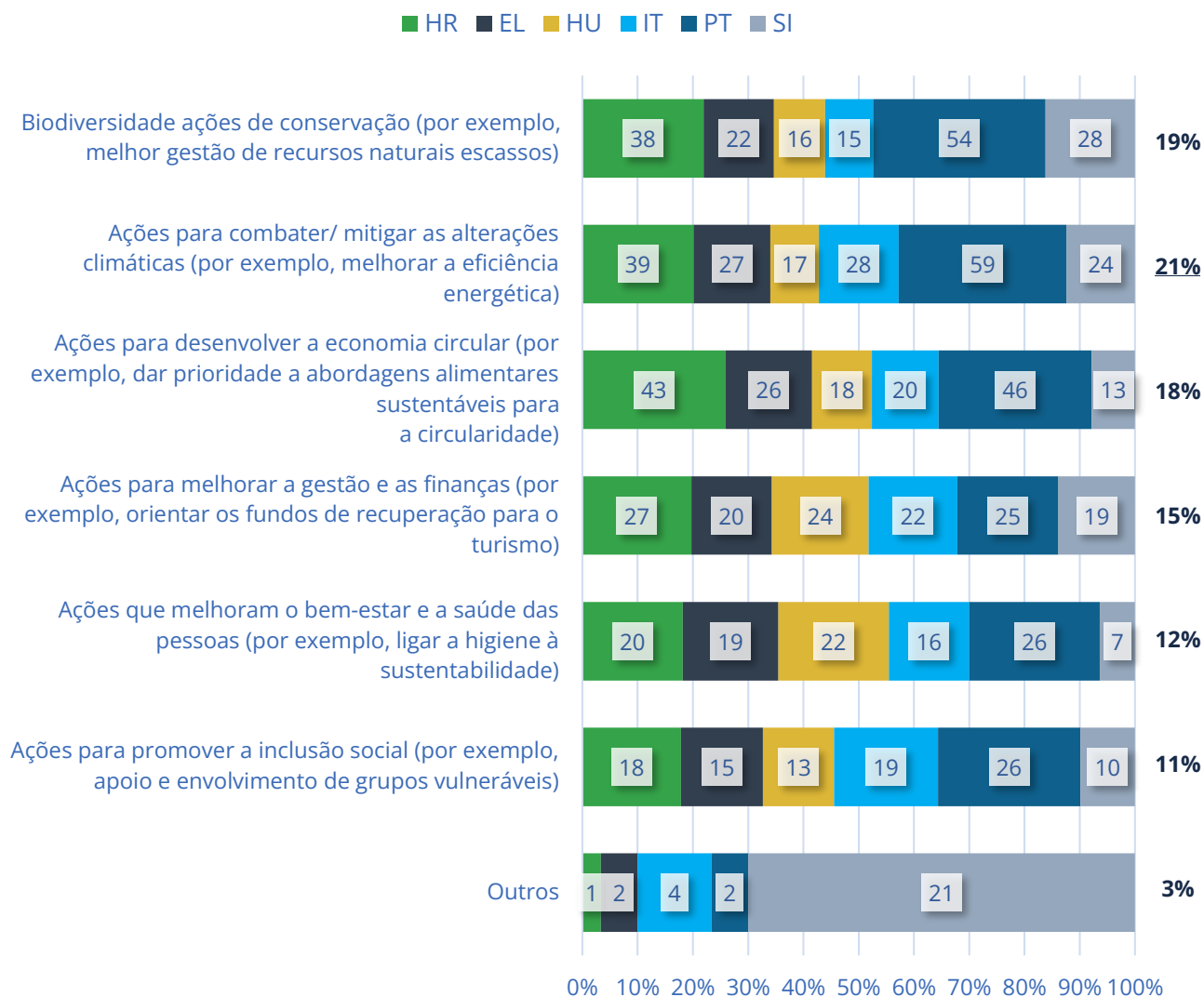
**Gráfico 3: Grupos etários dos inquiridos**



**Gráfico 4: Género dos inquiridos**

Os inquiridos consideram que as ações relacionadas com a atenuação das alterações climáticas, a conservação da biodiversidade e a economia circular são as mais cruciais. No entanto, a elevada percentagem de outras respostas indica que estas ações também são consideradas significativamente importantes.

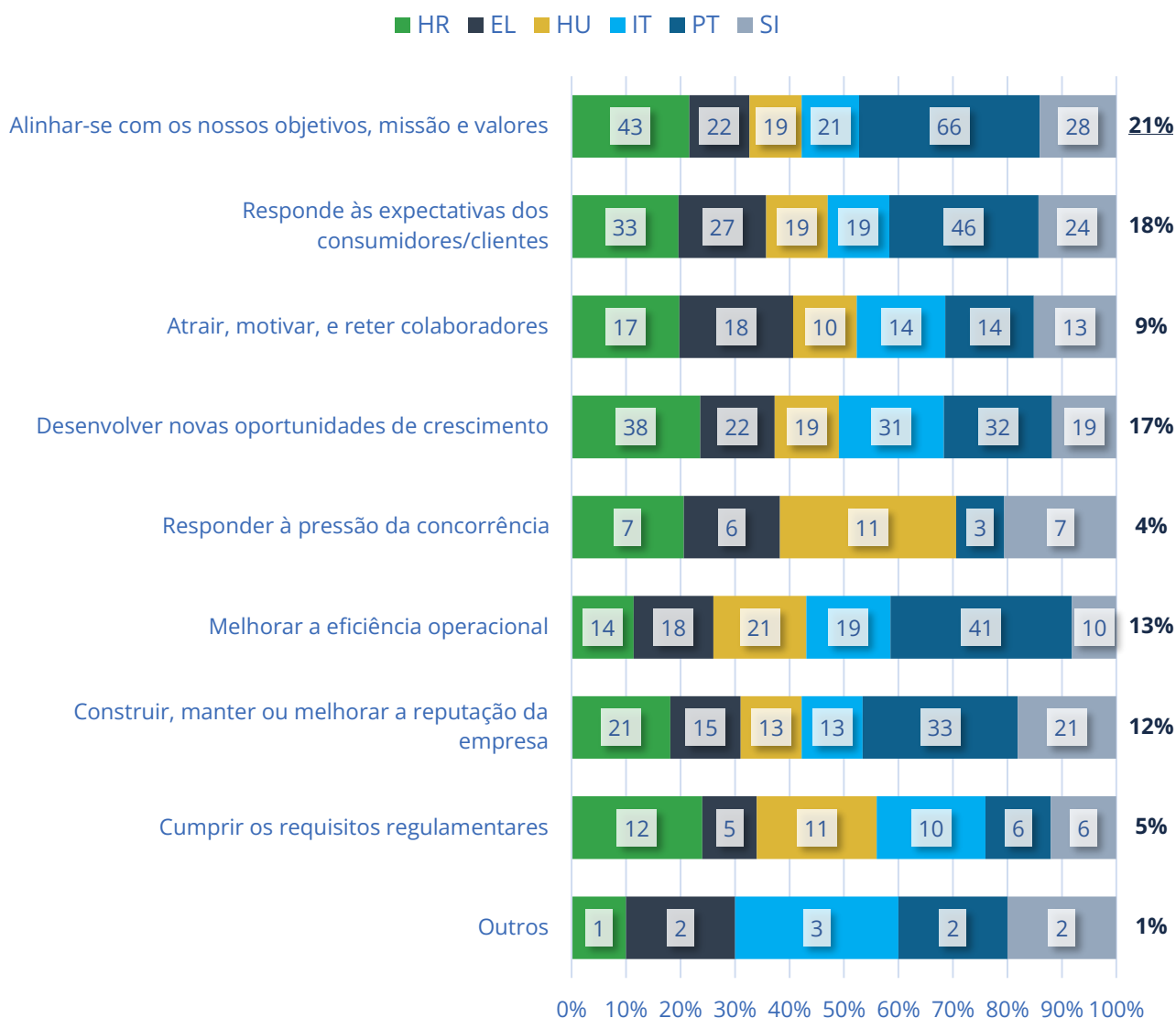
Questão 1: Práticas de turismo sustentável



**Gráfico 5: Ações que deveriam ser implementadas nas organizações dos inquiridos para tornar as práticas turísticas mais sustentáveis.**

A primeira razão para os inquiridos abordarem as questões da sustentabilidade é o alinhamento com os objetivos, a missão e os valores da sua organização, a satisfação das expectativas dos consumidores/clientes e o desenvolvimento de novas oportunidades de crescimento. É de salientar que a razão menos preferida é responder à pressão da concorrência.

Questão 2: Razões para abordar questões de sustentabilidade



**Gráfico 6: Razões que levam as organizações dos inquiridos a abordar as questões da sustentabilidade.**

A prioridade, segundo os inquiridos, é garantir a segurança no local de trabalho, seguida da promoção do emprego dos jovens e da promoção de um ambiente geral de tolerância zero em relação à violência e ao assédio, incluindo a violência baseada no género. Em último lugar na sua lista de prioridades está a integração dos migrantes.

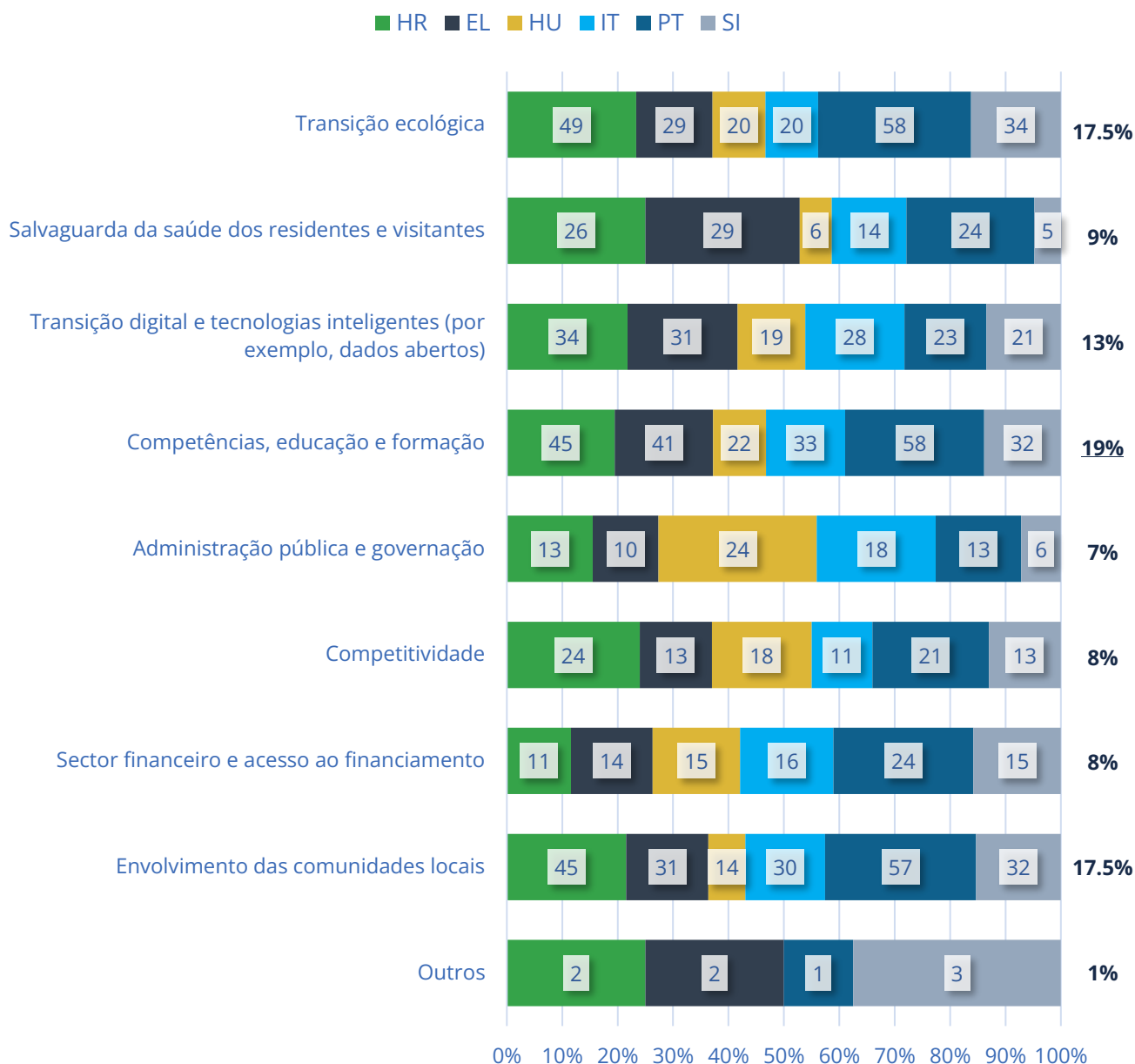
Questão 3: Prioridades nas ações de sustentabilidade social



Gráfico 7: Ações de sustentabilidade social consideradas prioritárias pelos inquiridos.

A ação mais importante a implementar para revitalizar o sector do turismo é a melhoria das competências, a educação e a formação dos trabalhadores e a menos importante é a administração pública e a governação.

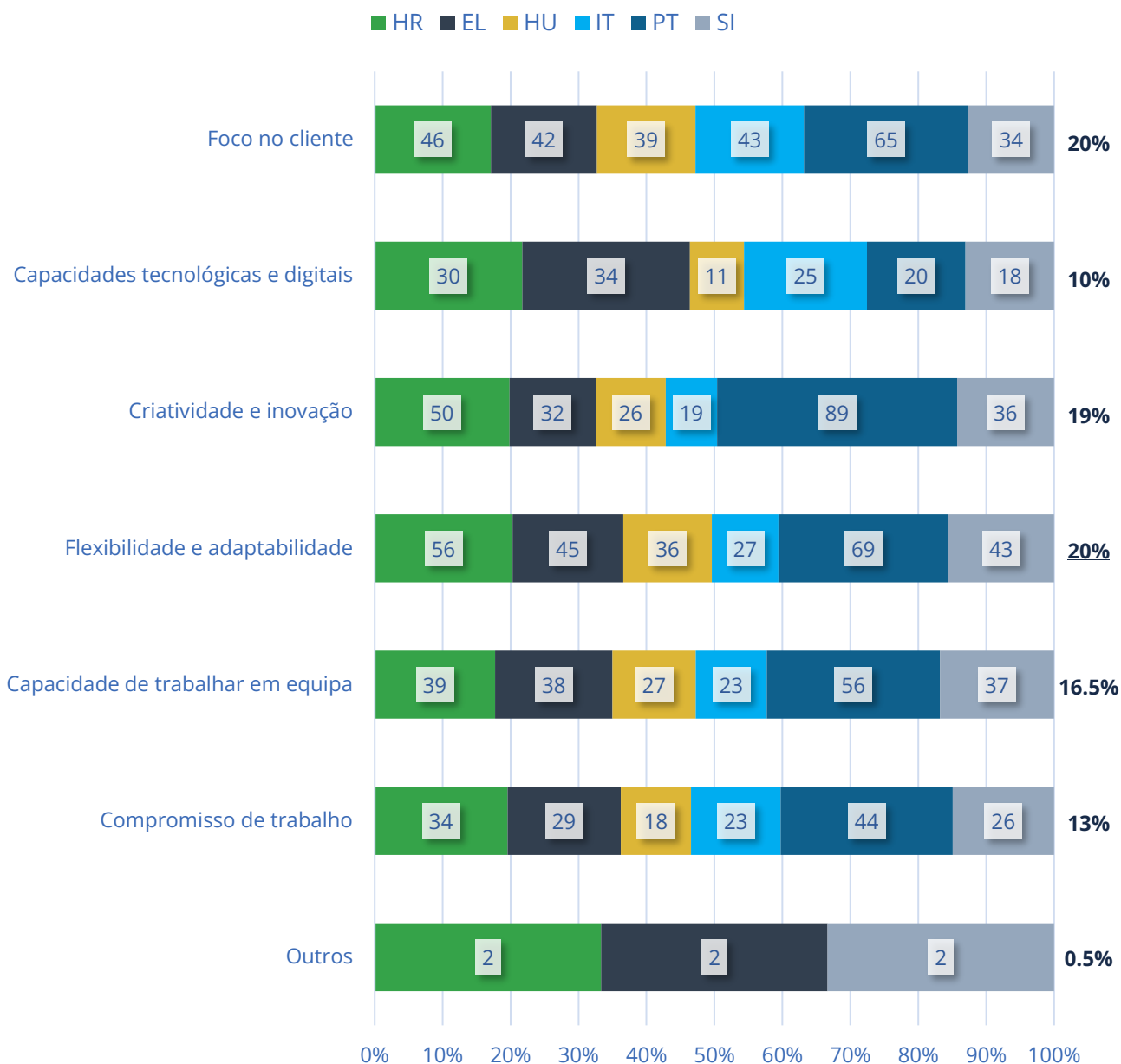
Questão 4: Ações para revitalizar o sector do turismo



**Gráfico 8: Medidas que devem ser implementadas para revitalizar o sector do turismo.**

As competências mais importantes para os atuais ou futuros trabalhadores do sector do turismo são a flexibilidade e a adaptabilidade e a focalização no cliente, enquanto as menos importantes são as capacidades tecnológicas e digitais.

Questão 5: Competências e aptidões



**Gráfico 9: Competências e aptidões mais importantes para as pessoas que querem trabalhar no sector do turismo**



A capacidade de gerir os resíduos, a água, a reciclagem e a compostagem é a primeira preferência da maioria dos inquiridos, ao passo que o conhecimento das alterações climáticas.

Questão 6: Competências ambientais para melhorar a competitividade dos sistemas de turismo

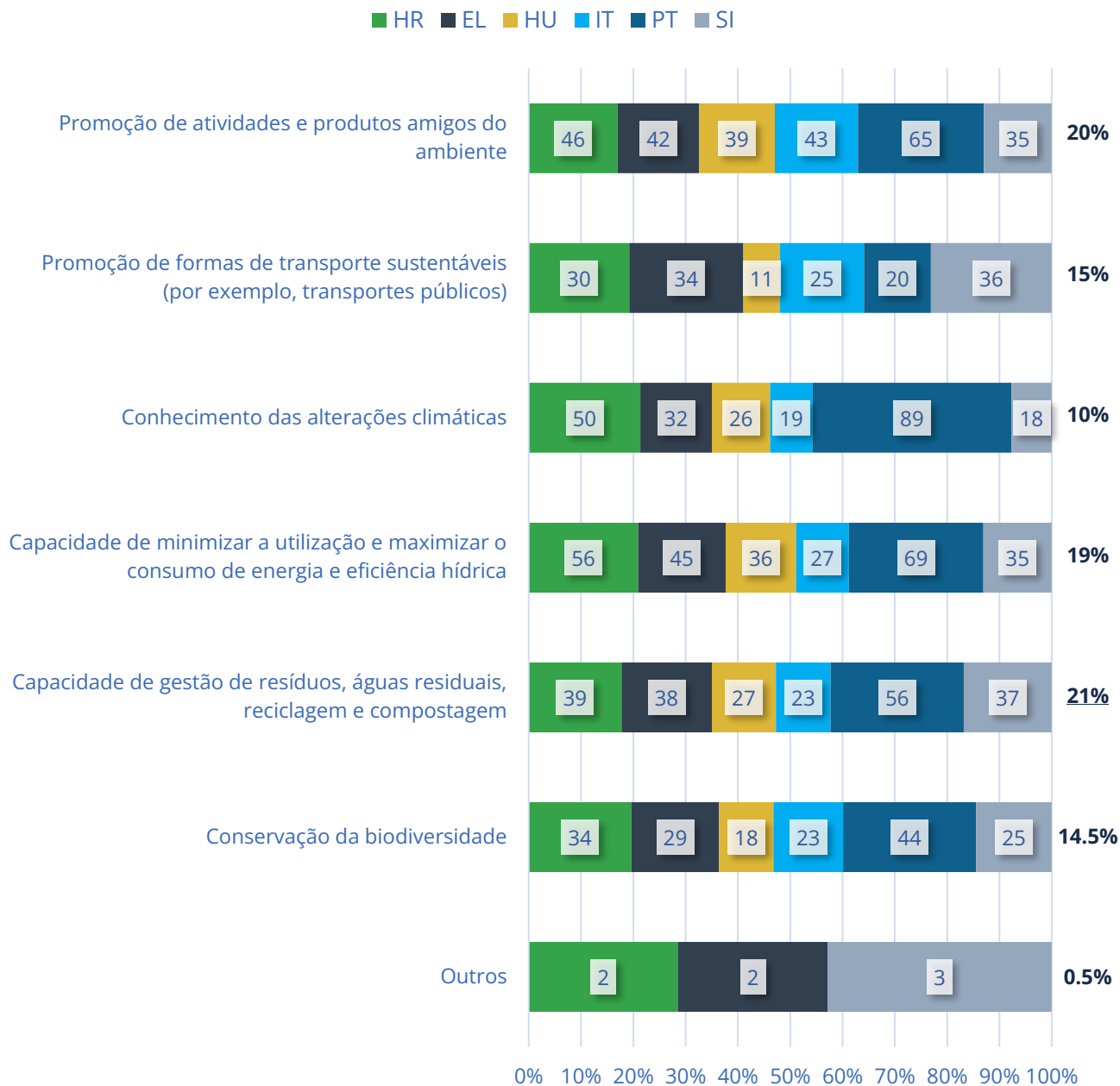


Gráfico 10: Competências ambientais para melhorar a competitividade dos sistemas de turismo.

As competências em matéria de marketing online, comunicação e redes sociais são claramente as mais populares, enquanto as competências em matéria de IA e robótica não parecem ser relevantes para os sistemas de turismo.

Questão 7: Competências digitais para melhorar a competitividade dos sistemas de turismo

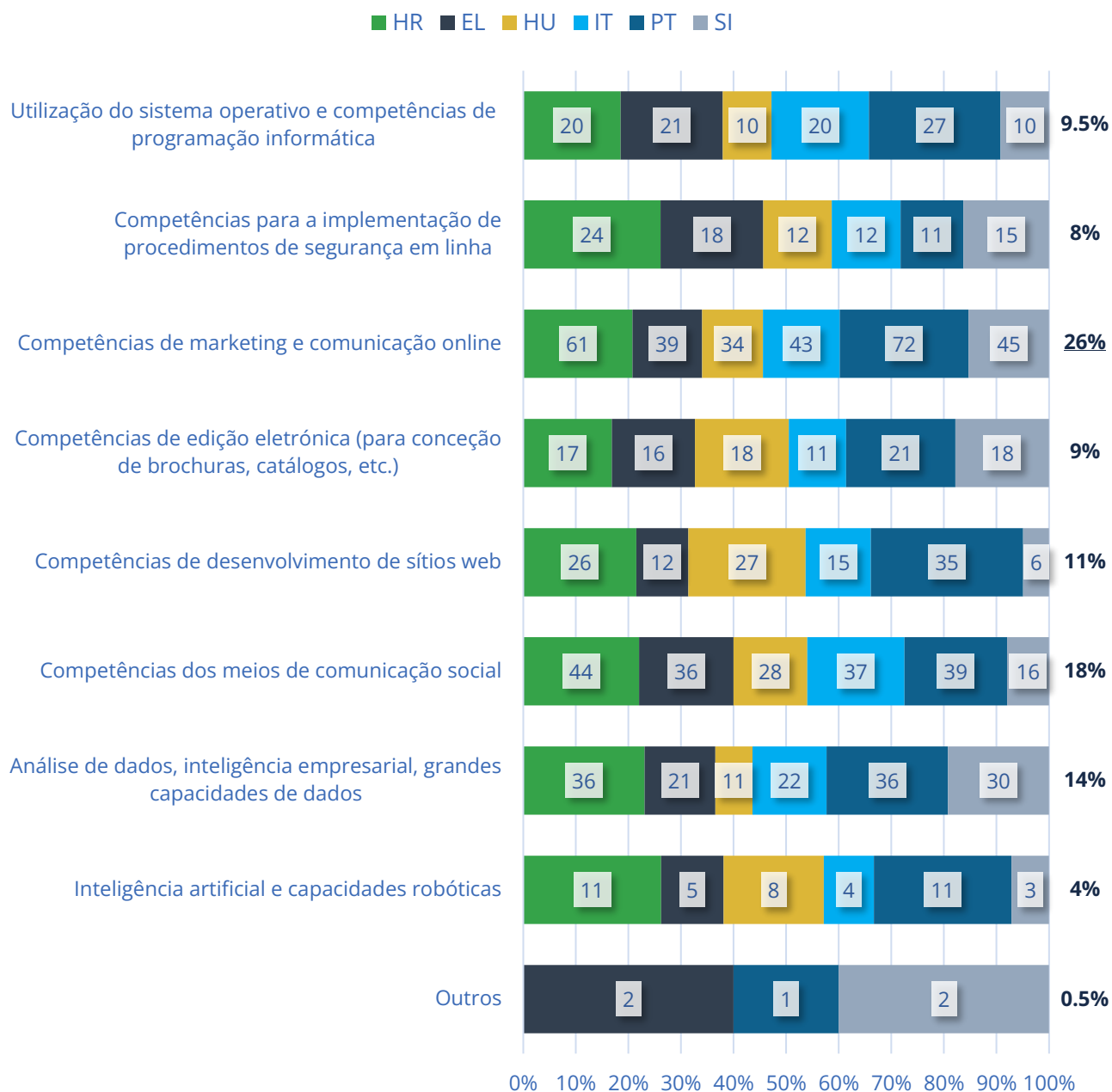
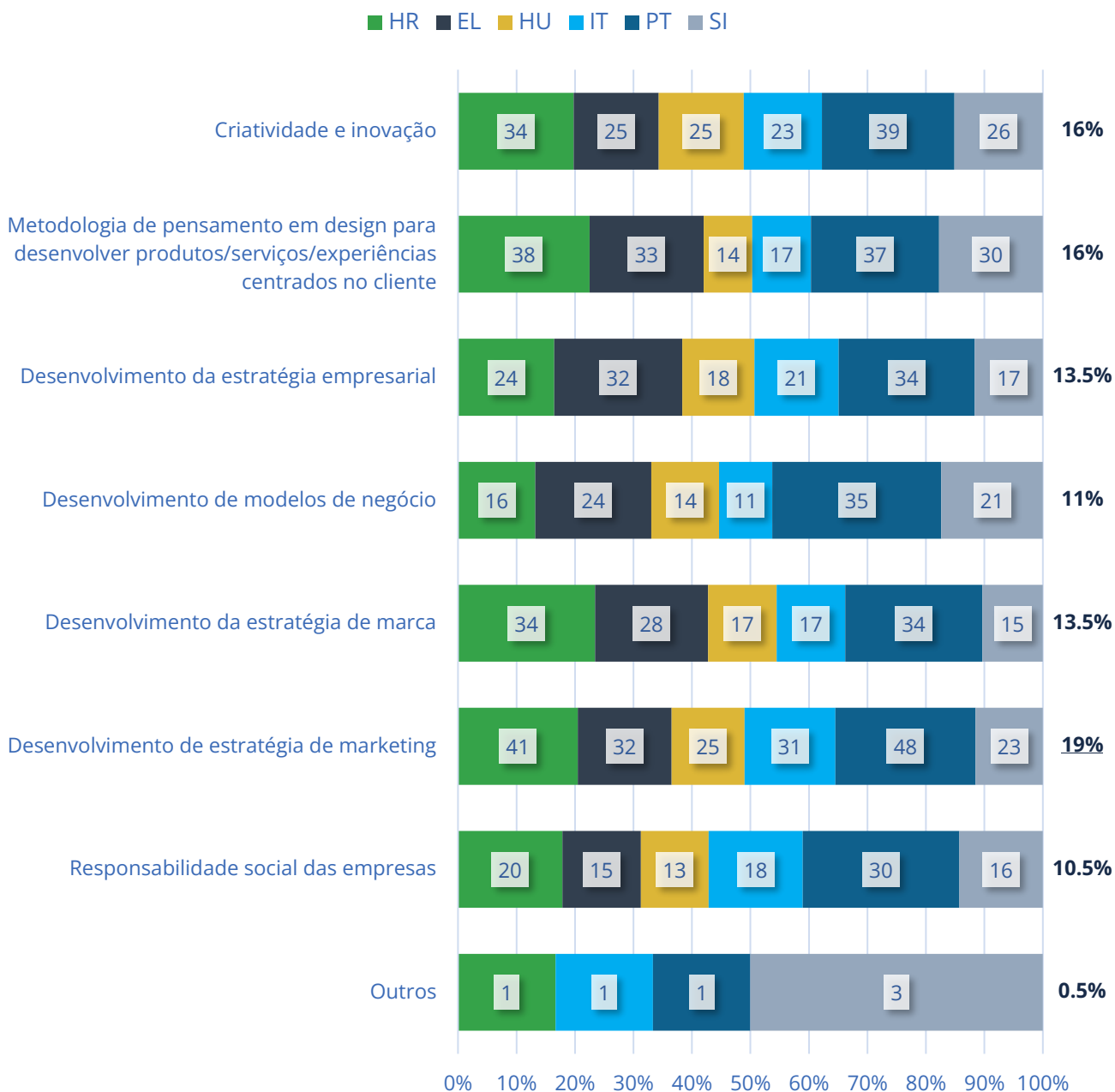


Gráfico 11: Competências digitais para melhorar a competitividade dos sistemas de turismo.

Os inquiridos mostraram-se interessados em quase todas as áreas do empreendedorismo, sendo o desenvolvimento de estratégias de marketing a mais proeminente entre as respostas.

Questão 8: Melhoria das competências (espírito empresarial)



**Gráfico 12: Áreas do empreendedorismo em que os inquiridos gostariam de melhorar as suas competências.**

Em termos de competências transversais, a gestão da mudança é a mais bem classificada, enquanto o serviço ao cliente é o menos preferido.

Questão 9: Melhoria das competências (competências transversais)

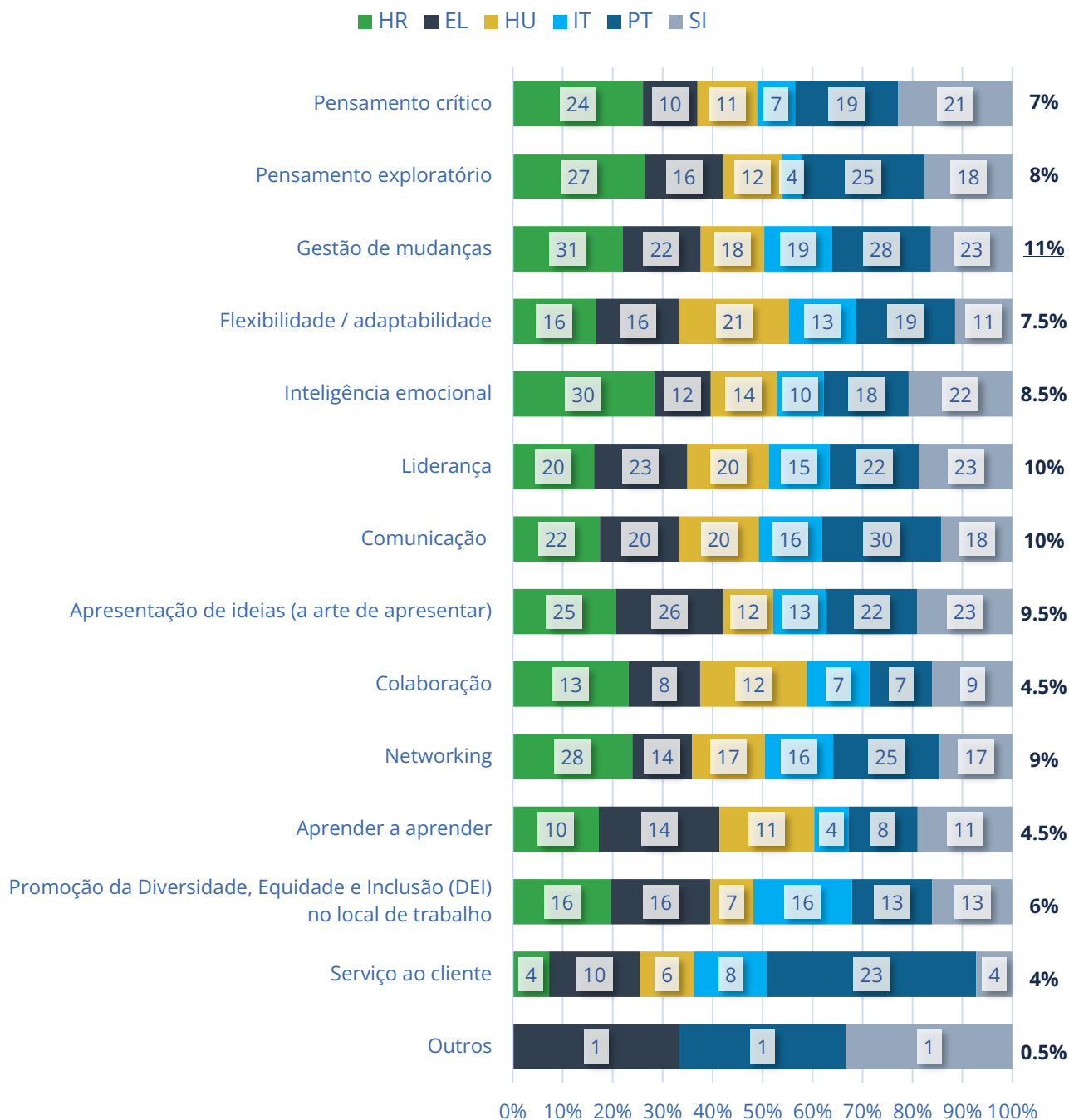


Gráfico 13: Competências transversais que os inquiridos gostariam de melhorar.

33,5% dos inquiridos consideram que a forma mais eficaz de formação é através de tutores no local de trabalho, 28% preferem as formações presenciais, enquanto 27% consideram que a melhor forma é aprender fazendo. A opção menos preferida é a formação online, com 10% das respostas.

Questão 10: Formulários de formação eficazes

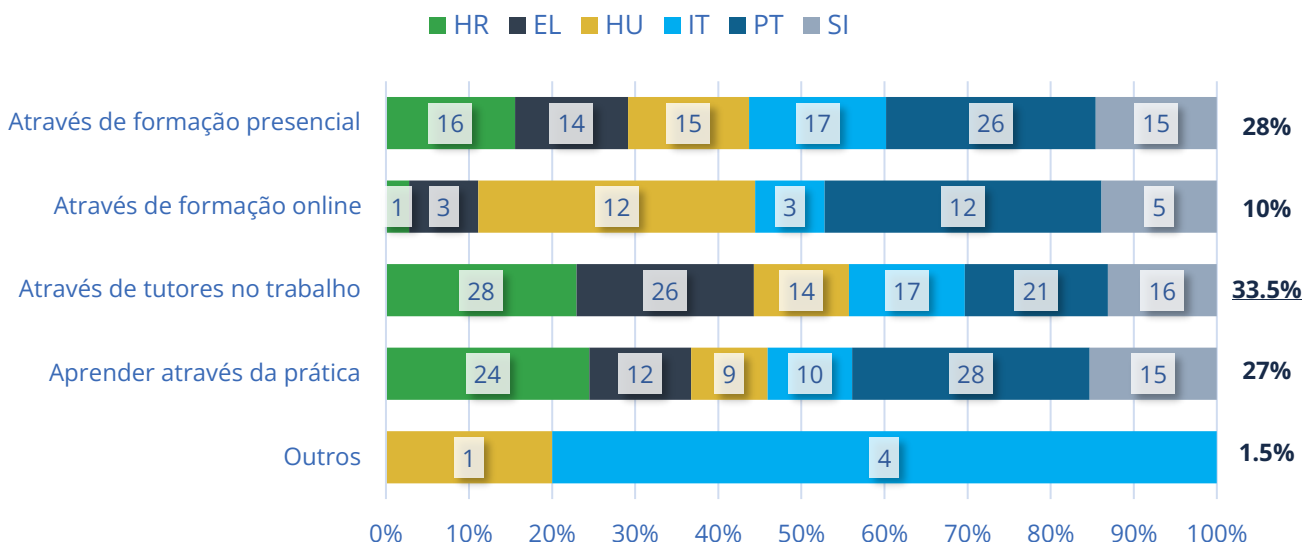


Gráfico 14: Eficácia das diferentes formas de formação dos profissionais do turismo.

É de salientar que a maioria dos inquiridos não aplica nenhuma das práticas-chave dos procedimentos de gestão de projetos. A mais preferível das opções dadas é a utilização de indicadores-chave de desempenho para medir a qualidade, o impacto e o sucesso.

Questão 11: Práticas utilizadas para realizar tarefas diárias

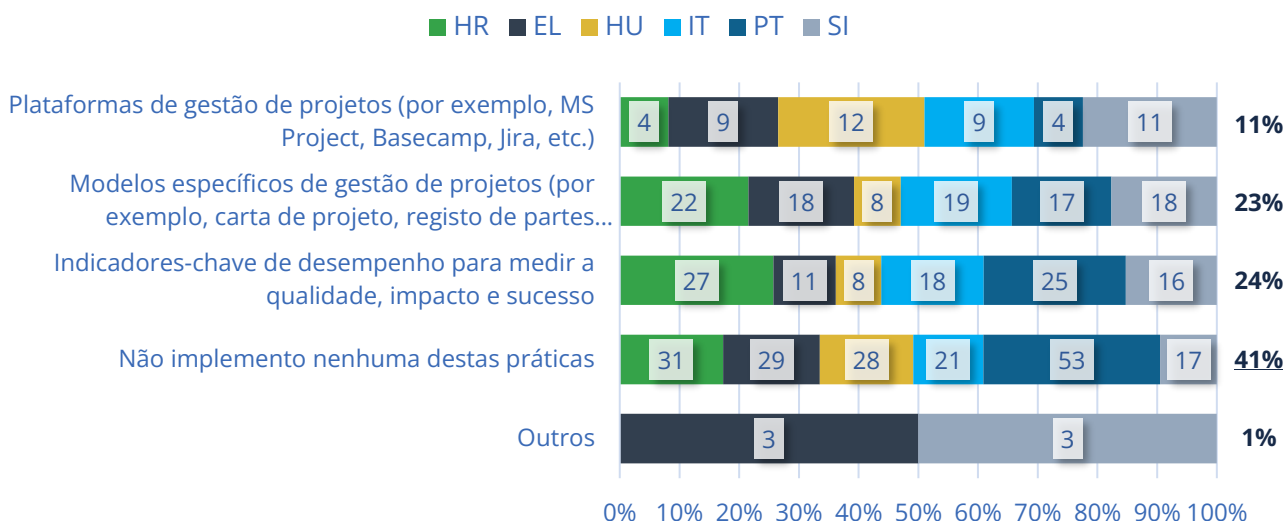


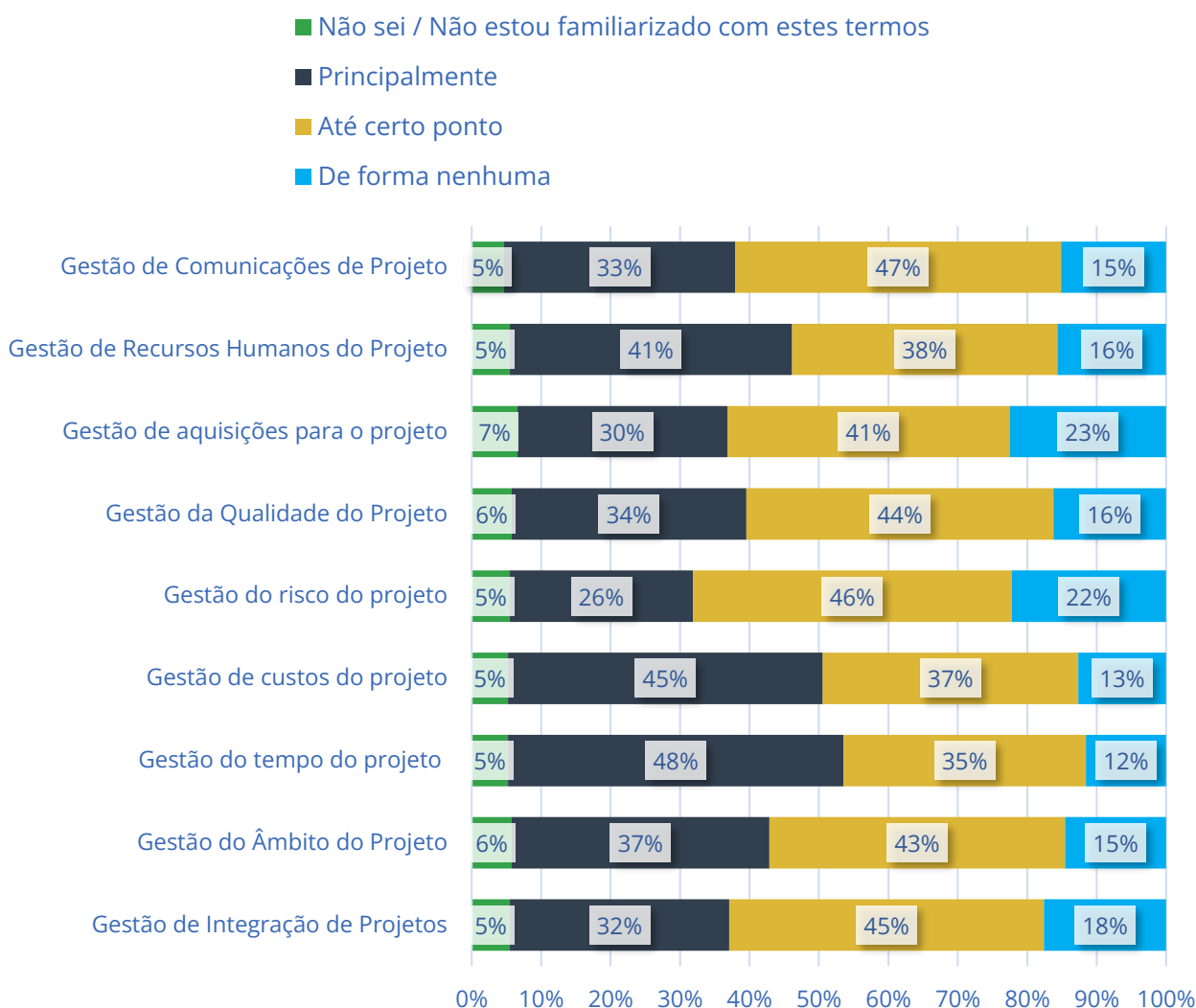
Gráfico 15: Práticas utilizadas pelos inquiridos para realizar as suas tarefas diárias.

Como se mostra a seguir, a maioria dos inquiridos tem conhecimentos básicos dos vários processos de gestão de projetos e utiliza-os, em certa medida, para realizar as suas tarefas diárias, enquanto uma percentagem significativa tem um elevado nível de conhecimentos e aplica-os diariamente.

Há uma percentagem pequena a média de inquiridos que não utilizam de todo estes procedimentos.

Por último, há uma percentagem estável e, por conseguinte, extremamente reduzida, como o demonstram as respostas, que nem sequer conhece estes termos.

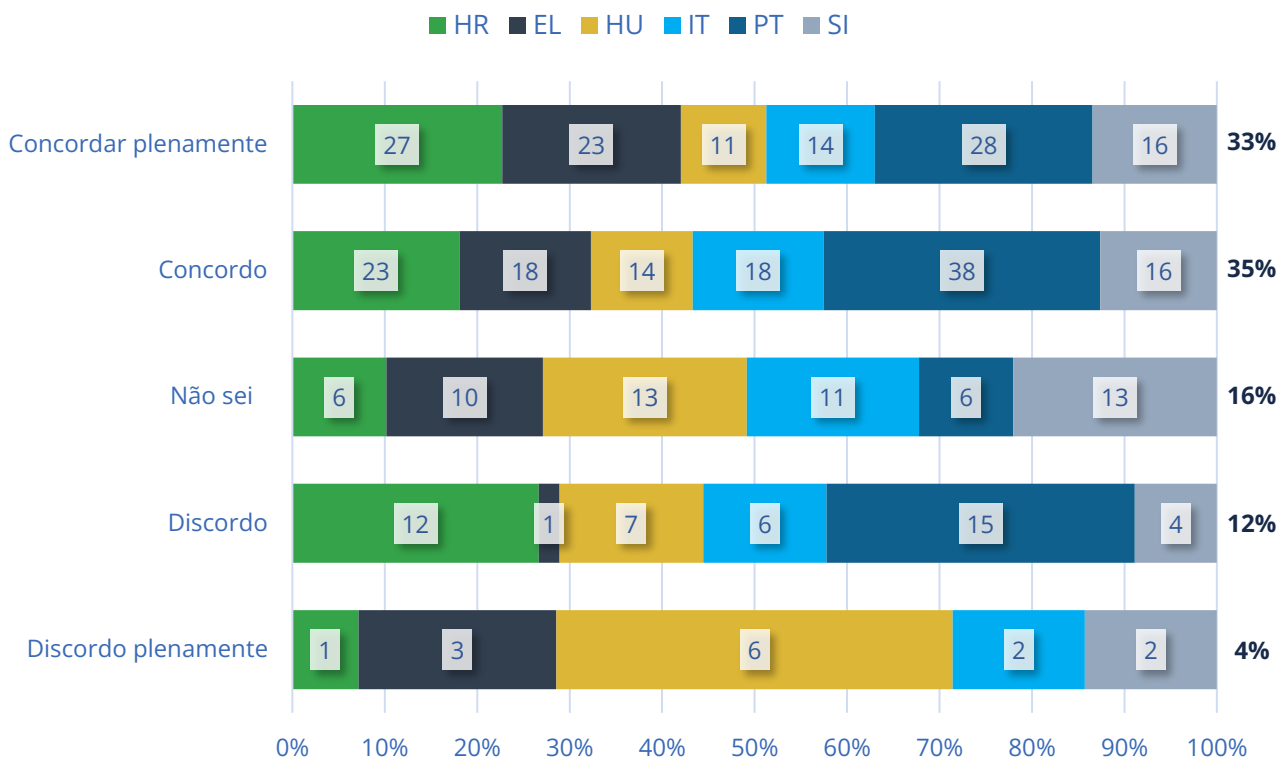
### Questão 12: Alargar a utilização de processos para implementar projetos e/ou tarefas diárias



**Gráfico 16: Medida em que os inquiridos utilizam diferentes processos de gestão de projetos para executar os seus projetos e/ou realizar as suas tarefas diárias.**

68% dos inquiridos concordam ou concordam fortemente que é benéfico para uma empresa de turismo ser flexível, gerir a mudança e seguir o mercado do que aplicar um planeamento a médio-longo prazo, enquanto 16% discordam ou discordam fortemente. Há ainda 16% que afirmaram não concordar nem discordar.

Questão 13: Flexibilidade e gestão da mudança ou planeamento a médio-longo prazo?



**Gráfico 17: Se é ou não vantajoso para uma empresa de turismo ser flexível, gerir a mudança e seguir o mercado do que aplicar um planeamento a médio-longo prazo.**

As duas abordagens de gestão de projetos mais populares entre os inquiridos são a "híbrida" (26%) e a "ágil" (25%). 16% dos inquiridos não estão familiarizados com estes termos ou não sabem se a sua organização está envolvida na gestão de projetos.

Questão 14: Abordagem de gestão de projetos



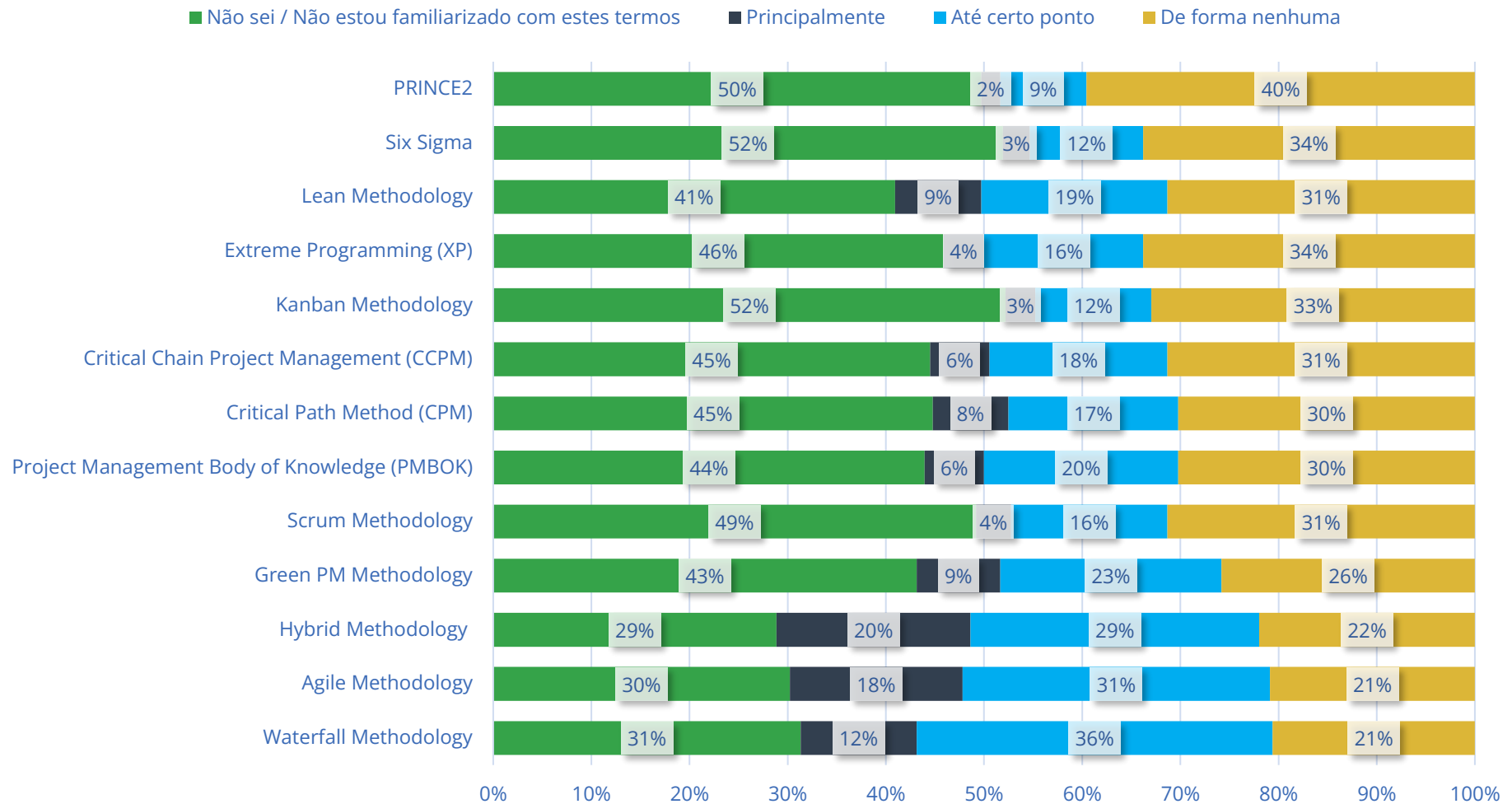
**Gráfico 18: As abordagens de gestão de projetos utilizadas nas organizações dos inquiridos.**

A grande maioria dos inquiridos não aplica metodologias de gestão de projetos nas suas atividades diárias ou nem sequer está familiarizada com estes termos.

No entanto, quando se trata de metodologias híbridas, ágeis e em cascata, há uma elevada percentagem que as utiliza em certa medida. Estas metodologias são também aquelas em que se registam as maiores percentagens de grande utilização.



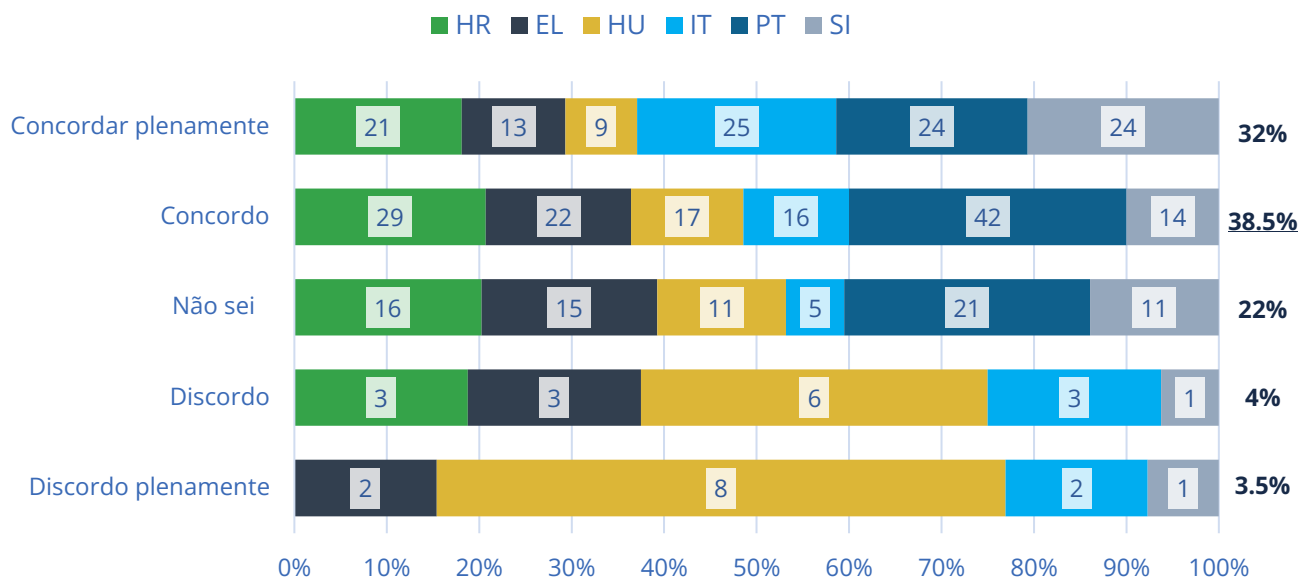
Questão 15: Extensão das metodologias de gestão de projetos utilizadas



**Gráfico 19: Se, e em que medida, a organização inquirida utiliza metodologias de gestão de projetos na execução de projetos/operações quotidianas.**

70,5% dos inquiridos concordam ou concordam fortemente que um gestor de projetos híbridos pode ser considerado um recurso competitivo, enquanto 7,5% discordam ou discordam fortemente. Há ainda 22% que afirmaram não concordar nem discordar.

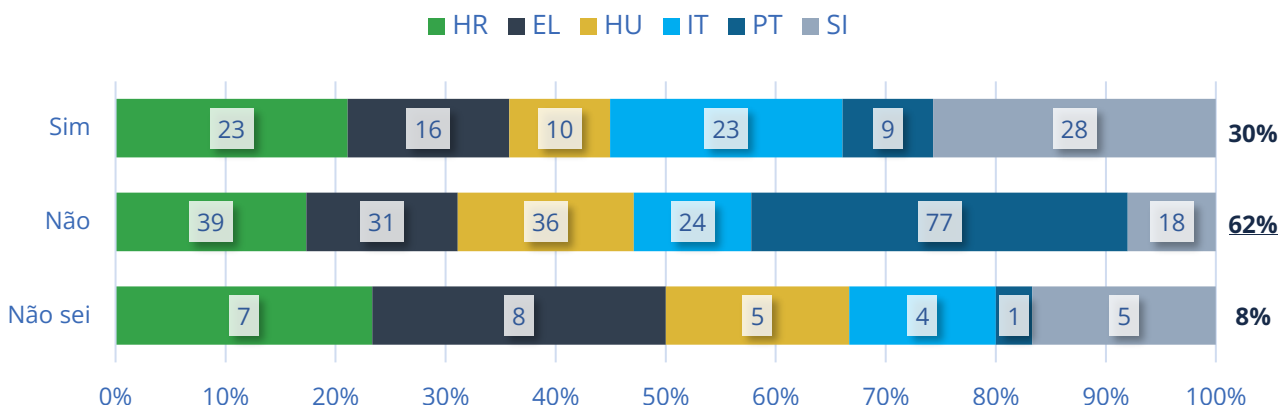
Questão Q16: O gestor de projetos como um recurso competitivo para as empresas do sector do turismo



**Gráfico 20: Se um gestor de projeto híbrido pode ou não ser considerado um recurso competitivo para as empresas de turismo e para os organismos públicos responsáveis pelas políticas de turismo.**

62% dos inquiridos afirmaram que não existe um posto de trabalho oficial intitulado "Gestor de projetos" no organigrama, enquanto apenas 30% afirmaram que existe. Há ainda 8% que desconhecem a existência ou não deste posto de trabalho específico.

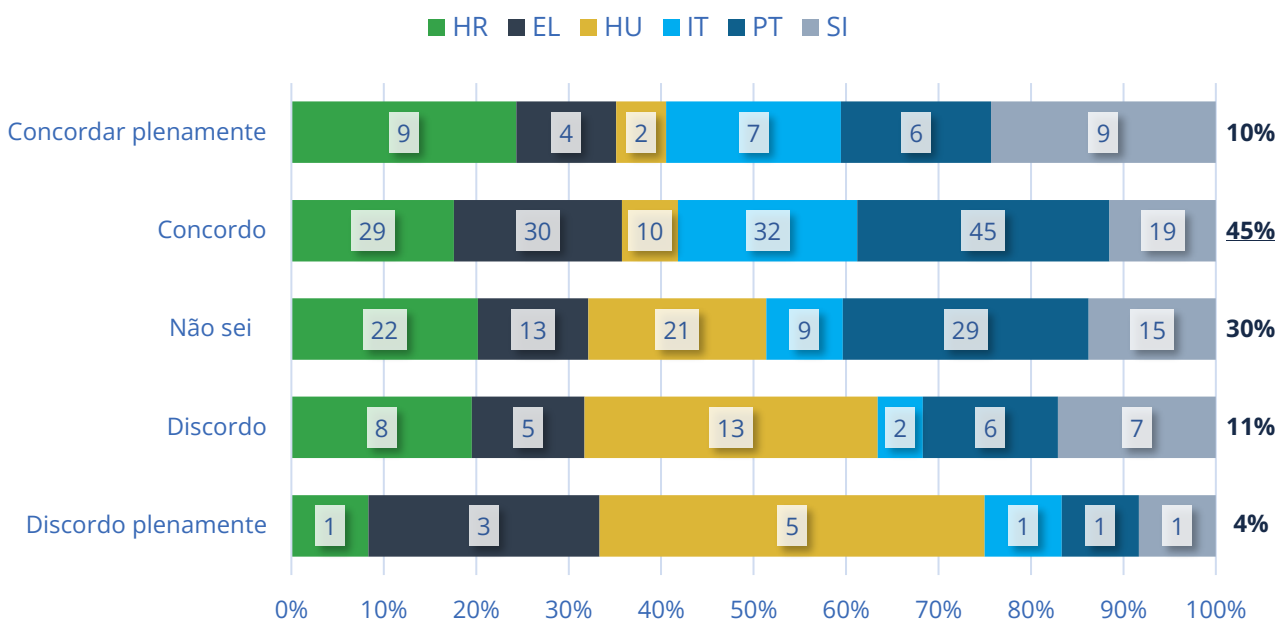
Questão 17: Título oficial do trabalho "Gestor de projectos" no organigrama



**Gráfico 21: Se existe ou não um posto de trabalho oficial intitulado "Gestor de projeto" no organigrama da organização.**

55% dos inquiridos consideram as suas competências de gestão de projetos satisfatórias, enquanto 15% pensam o contrário. Há ainda 30% que não concordam nem discordam da afirmação.

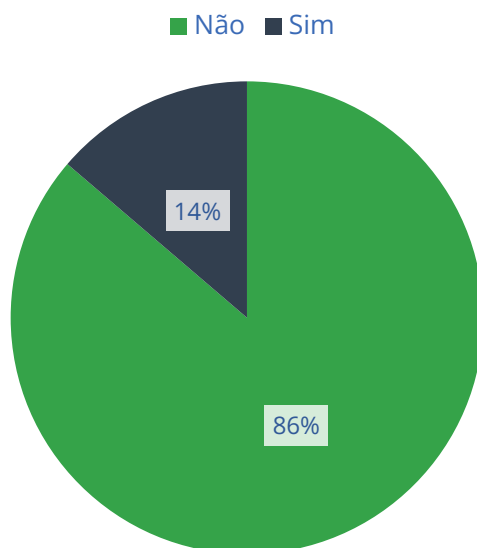
Questão 18: As minhas competências PM são satisfatórias



**Gráfico 22: Grau de concordância dos inquiridos com a afirmação "As minhas competências de gestão de projetos são satisfatórias".**

É evidente que apenas uma percentagem extremamente pequena dos inquiridos (14%) possui uma certificação em gestão de projetos.

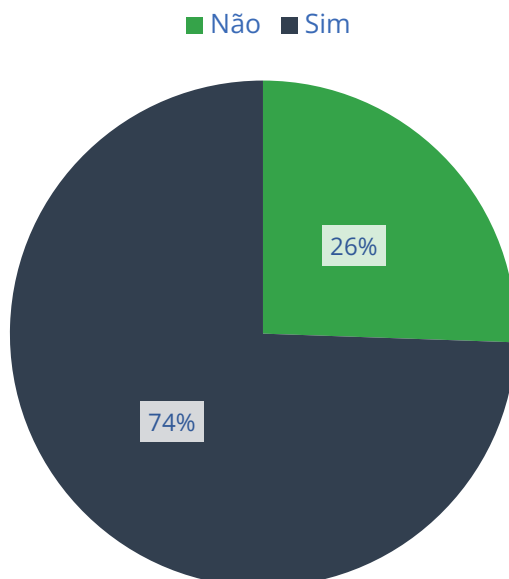
Questão 19: Certificação em PM



**Gráfico 23: Percentagem de inquiridos que possuem uma certificação em gestão de projetos.**

74% dos inquiridos estão dispostos a frequentar o curso de formação oferecido pelo projeto HyPro4ST, enquanto 26% não estão interessados.

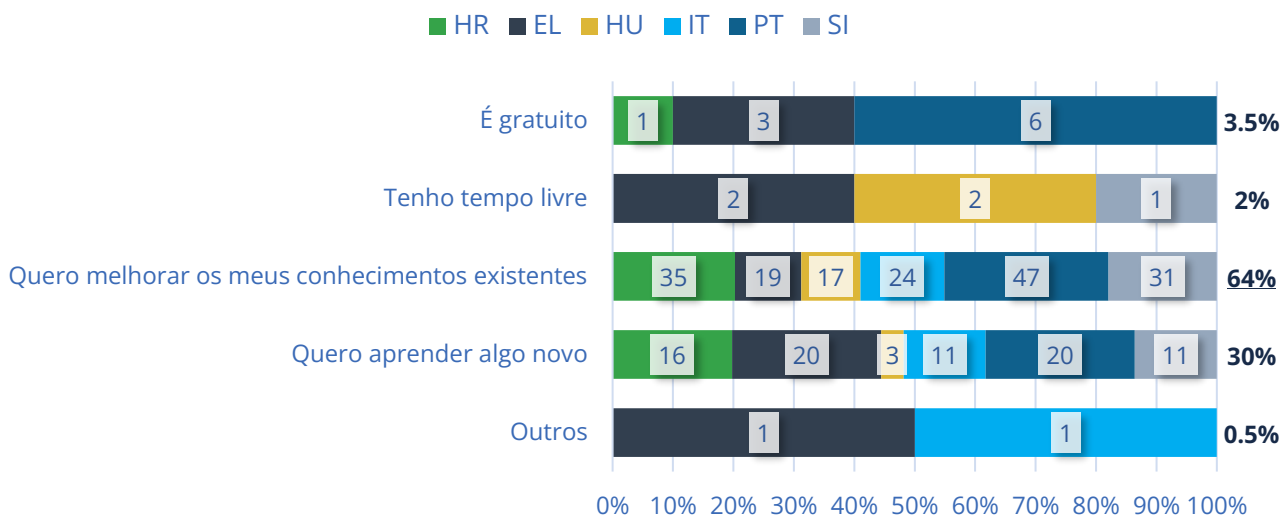
Questão 20: Interesse na frequência do curso HyPro4ST



**Gráfico 24: Percentagem de inquiridos interessados em frequentar o curso de formação HyPro4ST.**

As duas principais razões para participar no curso de formação são a vontade de aprender algo novo (44%) e a melhoria dos seus conhecimentos atuais (42%).

#### Questão 21: Razões para frequentar o curso HyPro4ST



**Gráfico 25: Razões para frequentar o curso de formação HyPro4ST.**

### 3.1.3 Resultados do inquérito (resumo)

Relativamente ao macro ambiente do turismo (sustentabilidade, competências, formação nos sistemas de turismo), os resultados de todos os relatórios nacionais são os seguintes

- As transições ecológica e digital são vistas como prioridades não só sociais, como também económicas;
- As entidades públicas, as empresas, os formadores e as ONG que operam no sector do turismo estão todos conscientes da necessidade de se adaptarem a estes fenómenos, melhorando as competências duras (técnicas) e suaves (sociais);
- Estes objetivos podem ser alcançados através da melhoria dos níveis de formação - especialmente se for ministrada no local de trabalho - e dos níveis de flexibilidade, criatividade e inovação;
- Os inquiridos são sensíveis à questão da segurança no local de trabalho.

Relativamente ao perfil da Gestão de Projetos Híbridos, os resultados de todos os relatórios nacionais são os seguintes

- A gestão de projetos é vista como um valor empresarial e os processos de organização da gestão são utilizados diariamente na execução das tarefas;
- Há uma ligeira preferência por abordagens ágeis ou híbridas, mas os sistemas tradicionais continuam a ser considerados eficazes.

- Parece que a aplicação prática dos conceitos de gestão de projetos está limitada a uma parte do mundo produtivo ou que uma parte consistente das empresas e das instituições públicas não está totalmente familiarizada com estes conceitos.
- Existe um grande interesse e abertura em relação a esta questão.

Foram criados diagramas de cada pergunta para melhor resumir os resultados a nível da UE. Todos estes diagramas estão disponíveis no Anexo J.

## 3.2 Investigação primária (qualitativa): O grupo de discussão/as entrevistas

### 3.2.1 Informações técnicas sobre os FGs/entrevistas

As entrevistas com os FG nacionais foram conduzidas pelos parceiros de diferentes formas; na maioria dos casos, a participação foi feita online (tendo em conta as distâncias, os horários e a disponibilidade); muitas vezes, as entrevistas com os membros do grupo de discussão foram conduzidas individualmente. Em qualquer dos casos, foi seguida a estrutura considerada adequada para este tipo de investigação qualitativa.

### 3.2.2 Composição dos FG e das entrevistas

**Tabela 4: Composição dos grupos de discussão/entrevistas na Croácia**

País	Detalhes	Composição
Croácia	5 pessoas no FG e 1 entrevista	Diretor do conselho local de turismo de um pequeno destino turístico costeiro
		Diretores de turismo que cobrem as zonas interiores específicas próximas dos destinos turísticos costeiros de renome (2)
		Diretor de um estabelecimento de ensino secundário vocacionado para a formação profissional nos domínios do turismo, da hotelaria e da restauração
		Diretor de uma empresa de consultoria do sector privado, especializada no domínio da gestão sustentável dos recursos humanos
		Representante do sector da hotelaria (coordenador da gestão da reputação de uma cadeia de hotéis)
		Diretor de uma empresa privada de relevância nacional orientada para a consultoria e a formação no domínio da gestão de projetos

**Tabela 5: Composição dos grupos de discussão/entrevistas na Grécia**

País	Detalhes	Composição
Grécia	6 Entrevistas	Proprietário do hotel
		Formador de educação de adultos
		Diretor do hotel
		Professor de Desenvolvimento e Finanças do Turismo, Presidente de uma organização regional de turismo
		Gestor de projetos e consultor empresarial
		Empresário

**Tabela 6: Composição dos grupos de discussão/entrevistas na Hungria**

País	Detalhes	Composição
Hungria	6 Entrevistas	Governo de Fejér
		Associação para a Vida nas Terras Altas do Lago Balaton
		Município de Székesfehérvár
		Associação Green Sárrét
		Associação de Desenvolvimento Regional do Lago Velence
		Universidade da Panónia Departamento de Turismo

**Tabela 7: Composição do grupo de discussão/entrevistas em Itália**

País	Detalhes	Composição
Itália	4 pessoas no FG e 2 Entrevistas	Gestor de projetos, com experiência em teatro, organização de eventos culturais, turismo e turismo sustentável
		Gestor de turismo, com especialização em gestão hoteleira e organização de viagens, com experiência em gestão de projetos comunitários
		Professor universitário (Universidade de Palermo), especialista no sector do turismo
		Perito no sector do turismo, com experiência também no domínio sindical
		Professor universitário (Universidade de Messina), especialista no sector do turismo
		Gestor de projetos, presidente de um itinerário cultural declarado pelo Conselho da Europa, com experiência em gestão de projetos da UE

**Mesa 8: Composição do grupo de discussão/entrevistas em Portugal**

País	Detalhes	Composição
Portugal	7 pessoas no FG / 7 Entrevistas	HRESP - Associação da Hotelaria, Restauração e Similares de Portugal
		Vertiriva
		Explore Iberia
		TOOBRA - Ofertas turísticas sobre o belo e rico Alto Alentejo
		Agroturismo Xistos
		Escola de Hotelaria e Turismo do Oeste

**Tabela 9: Composição do grupo de discussão/entrevistas na Eslovénia**

País	Detalhes	Composição
Eslovénia	4 pessoas no FG e 2 Entrevistas	Diretor do parque de aventuras GEOSS, conselheiro municipal do município de Litija e presidente da comunidade local de Vače
		Gestor de projetos no Centro de Desenvolvimento
		Gestor de projetos no Centro de excelência empresarial nos domínios da educação, da transferência de conhecimentos e da consultoria em turismo
		Funcionário público do Ministério da Transformação Digital da Eslovénia (antigo gestor de projeto na Universidade de Liubliana sobre turismo e antigo gestor de projeto na Associação de Cidades e Municípios da Eslovénia)
		Diretor de Alojamento, Turismo e Hotelaria
		Diretor do Instituto Público de Turismo, Cultura e Desporto do Município de Ormož

### 3.2.3 Resultados do grupo de discussão/entrevistados (resumo)

Relativamente ao macro ambiente do turismo (sustentabilidade, competências, formação nos sistemas de turismo), os resultados de todos os relatórios nacionais são os seguintes

- As questões relacionadas com a sustentabilidade estão a merecer cada vez mais atenção, especialmente na sequência da pandemia de Covid-19;
- Esta fase caracteriza-se por uma maior atenção às comunidades e territórios locais, condição que se manifesta também no sucesso do turismo de experiência;
- A sustentabilidade no turismo é um conceito muito difundido e considerado importante, mas não é devidamente apoiado nos cursos de formação;
- A transição digital é também uma tendência cada vez mais generalizada na sociedade e no mundo do turismo;



- As competências digitais, criativas e empresariais relacionadas com o turismo sustentável estão ainda por desenvolver;
- O turismo regenerativo não é muito conhecido, mas pode tornar-se uma prática turística importante no futuro;
- As competências em matéria de criatividade, inovação e liderança são consideradas decisivas.

Relativamente ao perfil da Gestão de Projetos Híbridos, os resultados de todos os relatórios nacionais são os seguintes

- A profissionalização do perfil do gestor de projetos nas organizações privadas e públicas é considerada necessária, mas ainda não é suficientemente reconhecida;
- Nos próximos anos, serão necessários conhecimentos de gestão de projetos no domínio digital, das TIC, do marketing e das competências operacionais;
- As pessoas compreendem o potencial do perfil "Gestor de Projetos Híbridos e sustentáveis", mas os sistemas de turismo ainda não estão familiarizados com o conceito.
- A abordagem holística é certamente a mais interessante, mas também a mais imprevisível, porque ainda não existe um esquema exato a aplicar, mas sim um modelo a adaptar em função das mudanças.

### **3.3 Investigação secundária (qualitativa): A investigação documental**

#### ***3.3.1 Informações técnicas sobre os FGs/entrevistas***

A pesquisa documental realizada pelos parceiros foi exaustiva e envolveu o estudo de muitos documentos. Foram analisados materiais de várias fontes oficiais, tais como planos de marketing de organismos públicos responsáveis pela gestão do turismo, planos estratégicos regionais, documentos produzidos por agências governamentais responsáveis pelo emprego, documentos relacionados com o sector da educação, relatórios universitários, etc.

Para a análise dos estudos de caso e das experiências profissionais, foi analisada informação recolhida principalmente através da Internet. No que diz respeito aos cursos de formação e ao tema da gestão de projetos, foi utilizada principalmente literatura académica e relatórios de institutos especializados.

#### ***3.3.2 Resultados da investigação documental (síntese)***

O quadro seguinte apresenta (de forma muito sintética) alguns extratos dos resultados da investigação documental realizada pelos parceiros em cada país. Para uma análise mais

aprofundada dos conteúdos da investigação, consultar os documentos originais elaborados pelos parceiros (ver [Anexo C a Anexo H](#)).

**Mesa 10: Resumo dos resultados da investigação documental mencionada nos relatórios nacionais**

País	Resumo da investigação documental
<b>Croácia</b>	A investigação documental foi dividida em três fases: a primeira consistiu na análise de documentos produzidos por organismos institucionais; a segunda centrou-se em instituições profissionais e académicas a nível nacional, regional e local; a terceira analisou, por um lado, revistas científicas e livros sobre gestão de projetos de turismo sustentável a nível nacional e, por outro, as experiências das ONG. Alguns dos temas que emergiram são: o desenvolvimento dos recursos humanos na indústria do turismo deve ser considerado uma prioridade; a necessidade de investir em ferramentas de aprendizagem digitais/híbridas de alta qualidade; existe uma oferta de formação significativa no domínio da gestão de projetos nas universidades croatas; os académicos devem prestar mais atenção ao facto de o conhecimento da gestão de projetos ter de ser aplicado e integrado na indústria do turismo e nos seus projetos; o sector das ONG envolvidas na gestão de projetos é vibrante.
<b>Grécia</b>	A investigação documental destacou a forma como o sector do turismo na Grécia está a evoluir, impulsionado por megatendências como o desenvolvimento tecnológico e a digitalização, a evolução demográfica e a sustentabilidade. As mudanças em curso conduzirão a um aumento da procura de competências e conhecimentos e à qualificação de um perfil profissional mais adequado para o satisfazer. O conceito de desenvolvimento sustentável nas instituições de ensino de turismo gregas é ao mesmo tempo muito popular e esquivo, uma vez que o tema não é abordado em todos os níveis de ensino. Uma consideração semelhante pode ser feita em relação à formação em gestão de projetos: os programas educativos, especialmente os cursos de pós-graduação em gestão do turismo, incluem cursos de gestão de eventos e de administração de empresas, mas nenhum deles inclui um curso específico de gestão de projetos, muito menos de gestão de projetos sustentáveis, ágeis ou híbridos.
<b>Hungria</b>	A investigação documental foi desenvolvida através da consulta de três tipos de documentos: 1. Documentos de desenvolvimento do turismo; 2. Documentos de desenvolvimento relacionados com a educação; 3. Formação relacionada com o turismo em instituições de ensino individuais. No primeiro caso, alguns documentos (sobretudo os de âmbito nacional) têm dado especial atenção às questões da sustentabilidade e da formação como instrumento de desenvolvimento turístico. No caso do segundo grupo de documentos, a questão da sustentabilidade é mencionada, embora de uma forma bastante geral e sem referência ao turismo. O terceiro grupo de documentos destaca os pontos fortes e as contradições do sistema de ensino do turismo: o ensino relacionado com o turismo é ministrado maioritariamente a dois níveis na Hungria, mas o ensino superior no domínio do turismo e da hotelaria está muito fragmentado e não existe coerência entre as universidades.

País	Resumo da investigação documental
<b>Itália</b>	A pesquisa documental foi realizada segundo dois percursos: o primeiro baseou-se na análise de quatro documentos estratégicos relativos, sobretudo, à sustentabilidade e organização empresarial, ao mercado de trabalho e competências turísticas, ao perfil de gestão de projetos. O outro caminho envolveu a análise de alguns documentos e sítios online sobre alguns temas considerados úteis para efeitos de investigação, incluindo a formação. A pesquisa documental evidenciou as mudanças em curso no sector do turismo e as possibilidades oferecidas pela criação de figuras profissionais como a do Gestor de Projetos Híbridos. Tendo em conta, ao mesmo tempo, a aplicação ainda limitada dos princípios avançados da gestão de projetos no turismo. De facto, enquanto o perfil do gestor de projetos híbridos já está estabelecido em muitos sectores (TI, indústria transformadora, etc.), as aplicações no domínio do turismo ainda estão por desenvolver. No entanto, existem áreas no sistema turístico em que a Gestão Híbrida de Projetos pode funcionar eficazmente no futuro.
<b>Portugal</b>	A pesquisa documental foi utilizada como ferramenta para recolher informações gerais e preparar as entrevistas com os membros do grupo de discussão local. Desta forma, foi possível definir o enquadramento da investigação tendo em conta os desafios do mercado de trabalho português e as necessidades de formação. A pesquisa documental foi desenvolvida através da consulta de materiais publicados em relatórios, artigos ou documentos semelhantes.
<b>Eslovénia</b>	A investigação documental centrou-se em alguns temas particularmente importantes. No que diz respeito à sustentabilidade, às competências e à formação nos sistemas de turismo: a necessidade crescente de uma transição para o desenvolvimento sustentável e mesmo regenerativo exige uma formação significativa nas aptidões e competências ecológicas dos trabalhadores a todos os níveis; embora os tópicos relacionados com a sustentabilidade sejam abordados nos currículos a diferentes níveis, existe uma falta de compreensão sobre a forma como as práticas sustentáveis podem ser implementadas especificamente entre os operadores turísticos (indústria do turismo). Relativamente ao perfil híbrido de gestão de projetos: As competências de gestão de projetos são cruciais para as operações do negócio do turismo. A criação de ecossistemas turísticos e o aumento do papel da partilha de dados exigem competências ainda mais avançadas em matéria de coordenação, comunicação e tomada de decisões com base em dados.

## 4. Melhores práticas

O quadro seguinte descreve as melhores práticas (por país) detetadas durante a investigação documental, tal como mencionadas nos relatórios nacionais.

**Mesa 11: Boas práticas mencionadas nos relatórios nacionais**

País	Melhores práticas	Descrição	URL
Croácia	<b>Gestão de projetos ecológicos - WYG Consulting</b>	A WYG Consulting, uma empresa de consultoria privada na Croácia, está a prestar serviços de formação certificada em gestão de projetos ecológicos. Integra e implementa as melhores práticas internacionais no domínio da sustentabilidade, incluindo os ODS da ONU, as Normas do Conselho de Normas de Contabilidade Sustentável, as Normas da Iniciativa de Relatórios Globais e a Metodologia P5 (Norma P5 para a Sustentabilidade em Projetos). Está centrado no PriSM™ (Projetos que integram Métodos Sustentáveis) como metodologia de gestão de projetos sustentável e baseada em princípios para uma melhor compreensão do ciclo de vida total dos ativos e que se estende para além do ciclo de vida típico do projeto. Esta abordagem integrada do projeto é uma das formas mais eficazes para as organizações alcançarem este equilíbrio.	<a href="#">Ligação</a>
	<b>Certificado de hotel UPUHH sustentável</b>	Há alguns anos, hotéis de toda a Croácia participaram no projeto-piloto da UPUHH - a Associação de Empregadores na Indústria Hoteleira da Croácia, atribuindo o rótulo "Hotel Sustentável". A UPUHH certifica as operações ecológicas do hotel, incluindo a gestão da sustentabilidade, a proteção ambiental, a eficiência energética, a formação do pessoal, a poupança no consumo de energia e de água, o controlo das emissões de CO2, entre outros.  Na primeira fase, foram organizados workshops para os hotéis registados e foram realizadas auditorias no terreno, em que cada hotel teve de nomear o seu próprio representante, o chamado Coordenador Verde, a quem se destinou o primeiro ciclo de workshops. Na segunda fase, os hotéis tiveram de implementar o projeto e assegurar a execução do plano de ação durante um período de três a cinco meses, após o que foi organizado um segundo ciclo de workshops para analisar os resultados alcançados. Até à data, 49 hotéis receberam o rótulo de "Hotel Sustentável".	<a href="#">Ligação</a>

País	Melhores práticas	Descrição	URL
Grécia	<b>Luxuoso Hotel Costa Navarino em Messinia</b>	A estratégia da Costa Navarino Hotel considera que os associados/trabalhadores estão no centro dos seus esforços para promover o turismo sustentável nas áreas em que operam. A criação de postos de trabalho de qualidade num ambiente de trabalho seguro que encoraja a inovação, combinada com a oferta de formação de alta qualidade baseada nos talentos e necessidades de cada indivíduo, são essenciais para que os seus empregados se tornem os embaixadores da sua visão, enquanto prestam um serviço da mais alta qualidade aos seus visitantes. Além disso, a sua política de emprego reforça os laços com a comunidade local e contribui, direta e indiretamente, para o desenvolvimento económico e social da região.	<a href="#">Ligação</a>
	<b>SANI-IKOS Group Resort Hotel</b>	O hotel está empenhado no desenvolvimento dos seus funcionários e investe na sua formação, ao mesmo tempo que oferece programas para facilitar a atualização de competências e o desenvolvimento da carreira. Os empregados, desde o seu primeiro dia e ao longo das suas carreiras no Resorts, beneficiam de formação externa, certificações profissionais, oportunidades de educação contínua e associações profissionais. Alguns dos cursos de formação que são ministrados incluem conhecimentos sobre processos sustentáveis, tais como desperdício zero, conformidade ambiental, eficiência energética e hídrica, biodiversidade, saúde e segurança.	<a href="#">Ligação</a>
	<b>GRECOTEL Hotel Resort</b>	O principal objetivo da empresa é reduzir o impacto ambiental e social negativo das suas atividades comerciais. A GRECOTEL contribui ativamente para a proteção dos ecossistemas gregos, todos os funcionários recebem formação para se familiarizarem com os valores fundamentais e o código de conduta da empresa e, por último, frequentam programas de formação completos para desenvolverem as suas competências e aumentarem as suas oportunidades de carreira.	<a href="#">Ligação</a>
Hungria	<b>HUB online e currículo de e-learning sobre turismo circular e sustentável para operadores turísticos em destinos excecionais. Projeto RE-CONNECT</b>	O projeto RE_CONNECT é um projeto em curso financiado pelo programa Erasmus+. Envolve 6 parceiros de 5 países. O RE-CONNECT tem como objetivo acelerar o desenvolvimento de competências e aptidões do turismo comunitário em destinos excecionais, implementando uma abordagem de desenvolvimento mais ecológica e digital para garantir um turismo mais sustentável ao longo da abordagem do turismo circular. No âmbito do projeto, foi desenvolvido um centro de colaboração online que proporciona o desenvolvimento de competências e aptidões no domínio do turismo circular de base comunitária. Para além do HUB online, o outro resultado principal do projeto é um currículo de e-learning com módulos sobre turismo circular e sustentável.	<a href="#">Ligação</a>

País	Melhores práticas	Descrição	URL
	<b>Licenciatura em Turismo Sustentável e Baseado na Economia Circular, Universidade de Pannon</b>	O objetivo da formação é formar profissionais para o sector do turismo que tenham uma compreensão profunda do funcionamento da economia circular, para além dos conhecimentos básicos de turismo; são capazes de conceber e operar as partes interessadas, organizações com e sem fins lucrativos do sector com métodos baseados numa abordagem circular, tudo numa lógica regional e de destino, com base numa abordagem sistémica, com base no turismo quase natural.	<a href="#">Ligação</a>
Itália	<b>Festival das energias alternativas</b>	O festival Alter-native energies foi lançado em Gibellina, na Sicília, em 2007, com a ideia de criar um evento inovador a realizar todos os anos na Sicília em locais únicos. A missão do festival era criar uma comunidade de artistas, empresas, organismos públicos e cidadãos que se reunissem para promover as aplicações das energias renováveis e da sustentabilidade, e que pudessem expressar a sua alternatividade.  O festival Energias Alternativas promove encontros com talk-shows de sensibilização para as energias renováveis, workshops para escolas, desfiles de moda com roupas recicladas, concertos e espetáculos de teatro e dança que representam a relação entre o ser humano e as energias renováveis.	<a href="#">Ligação</a>
	<b>Ecomuseu de Rocche del Roero</b>	O ecomuseu é, portanto, um museu ao ar livre onde a cultura local, os testemunhos antropológicos da comunidade, e o conhecimento do território se tornam um bem cultural imaterial. E, de um ponto de vista pós-moderno, um produto turístico.  As atividades desenvolvidas pelo Ecomuseu de Rocche di Roero abrangem vários domínios: promoção do território, didática para as escolas, aplicação das tecnologias da informação à oferta turística, digitalização da informação, etc.	<a href="#">Ligação</a>
Portugal	<b>Empresas do projeto Turismo 360 by Turismo de Portugal</b>	O projeto Empresas Turismo 360 do Turismo de Portugal dedica-se à formação e consultoria de empresas para o desenvolvimento de conceitos de sustentabilidade com base no referencial europeu de sustentabilidade. A aposta é no desenvolvimento de ações que passam pela capacitação das empresas turísticas para incorporarem indicadores Ambientais, Sociais e de Corporate Governance (ESG) nos seus processos de gestão, pela disponibilização de ferramentas de monitorização e modelos de relatórios de sustentabilidade e pela promoção do reconhecimento público das organizações.	<a href="#">Ligação</a>

País	Melhores práticas	Descrição	URL
	<b>Agroturismo Xistos</b>	O Agroturismo Xistos tem desenvolvido projetos com o objetivo de valorizar a realidade rural e a componente social, utilizando o turismo como ferramenta de mensagem e comunicação. Destacando ideias associadas ao turismo como a valorização da produção agrícola, a sustentabilidade, o uso eficiente da água, dos recursos florestais e a eficiência energética. A Escola de Hotelaria e Turismo do Oeste que tem vindo a trabalhar os conteúdos do turismo regenerativo, em parceria com a Agrobio para trabalhar os conteúdos formativos disponíveis no curso de e-learning da academia digital. Este curso faz a ligação entre o Turismo e a agricultura biológica e desenvolve assim a ideia de regeneração de atitudes e comportamentos, bem como a regeneração de produtos turísticos e alimentares.	<a href="#">Ligação</a>
	<b>Academia Digital do Turismo de Portugal</b>	A Academia Digital tem como objetivo promover o desenvolvimento das pessoas e a capacitação das empresas. Criada pelo Turismo de Portugal, a Academia Digital destina-se a todos os que pretendem fazer formação, aceder a workshops e seminários, ou mesmo subscrever serviços de formação à medida disponibilizados pelas 12 Escolas do Turismo de Portugal.	<a href="#">Ligação</a>
<b>Eslovénia</b>	<b>Coordenadores Verdes e gestão do regime verde do turismo esloveno</b>	Trata-se de um programa de certificação nacional que reúne todos os esforços de turismo sustentável no país sob a marca SLOVENIA GREEN. O principal objetivo estratégico do programa é introduzir modelos sustentáveis no turismo esloveno, nos prestadores de serviços turísticos e nos destinos. Centra-se na oferta de ferramentas a destinos e prestadores de serviços que lhes permitam avaliar e melhorar os seus esforços de sustentabilidade e na promoção destes esforços ecológicos através da marca SLOVENIA GREEN. Embora o GSST trate de uma abordagem mais ampla e sustentável, quase metade dos indicadores estão (in)diretamente ligados à economia circular, as estimativas desenvolvem planos de ação com medidas para melhorar a eficiência energética dos edifícios, as práticas de gestão de resíduos e a eficiência da utilização da água, utilizando fontes de energia verdes e estabelecendo objetivos rigorosos para a eliminação e reciclagem de resíduos. Além disso, é uma ferramenta para avaliar e melhorar o desempenho de sustentabilidade dos destinos e fornecedores. Os objetivos do regime consistem também em introduzir modelos empresariais sustentáveis ao nível das unidades mais pequenas individuais, de acordo com o método de avaliação da sustentabilidade. Para a aquisição, manutenção e renovação do Selo de Destino Verde da Eslovénia, os destinos têm de seguir 11 etapas. Estas 11 etapas são coordenadas, supervisionadas e monitorizadas pelo Coordenador Verde e pela Equipa Verde.	<a href="#">Ligação</a>

País	Melhores práticas	Descrição	URL
	<p><b>Programa de ensino superior "Práticas Turísticas Contemporâneas" na Faculdade de Turismo, Universidade de Maribor, Eslovénia</b></p>	<p>A Faculdade de Turismo da Universidade de Maribor decidiu, a 1 de outubro de 2020, alterar o programa de ensino de Estudos de Turismo. Decidiram, em primeiro lugar, abrir dois níveis diferentes do programa, ou seja, o nível de ensino superior e o nível universitário foram abertos à escolha dos estudantes.</p> <p>Em cada ano, podemos encontrar tipos de disciplinas que apoiam as aptidões, as competências e os conhecimentos necessários para uma gestão e um enquadramento bem-sucedidos do sector do turismo. Os cursos incluídos apoiam o desenvolvimento de novas competências-chave já entre os jovens, tais como Empreendedorismo no turismo, Comunicação digital no turismo, Marketing e pesquisa de mercados turísticos, Criatividade na promoção do turismo, Gestão de estabelecimentos de restauração, etc. A razão para alterar o programa nos seus fundamentos é a mudança das condições no sector do turismo que permite a necessidade de novos conhecimentos, aptidões e competências. A Faculdade de Turismo está consciente da importância de eliminar as lacunas entre o ensino e a prática, pelo que deve também adaptar-se a este tipo de situação no mercado turístico.</p>	<p><a href="#">Ligação</a></p>
	<p><b>Fazer crescer a Eslovénia com a Google</b></p>	<p>Grow with Google Slovenia (Google, 2023) é um programa que oferece formação gratuita a todos os interessados em melhorar as suas competências em marketing digital e na utilização das ferramentas Google. A formação Grow with Google centra-se em três áreas: Noções básicas de marketing digital e competências digitais; Noções básicas de marketing digital e competências digitais no sector do turismo; Noções básicas de inteligência artificial no marketing e nas vendas online. Foram abordados diferentes temas como Marketing digital, Otimização de páginas Web, Publicidade online, Publicidade nas redes sociais, etc. A Google ofereceu formação de nível básico, mas muito prática, sobre a utilização das suas ferramentas digitais, destinada principalmente a proprietários e gestores de PME. Ilustradas pelos exemplos locais, estas ações de formação de elevada qualidade foram disponibilizadas a todos os que pretendem melhorar as suas competências em matéria de marketing digital, com o apoio das inúmeras ferramentas da Google e da sua reputação de líder de mercado.</p>	<p><a href="#">Ligação</a></p>

A lista de boas práticas é vasta e articulada e ultrapassa a previsão de 10 exemplos. A heterogeneidade das experiências propostas é particularmente interessante. Vão da formação certificada em gestão de projetos verdes da Croácia às experiências de hotéis de turismo sustentável da Grécia, dos projetos de formação realizados na Hungria às experiências de valorização do território italiano, das iniciativas de governação sustentável de Portugal aos projetos de gestão verde e à formação especializada da Eslovénia. Estas iniciativas envolvem todos os sectores de atividade (público, privado, educativo e ONG). A variedade de propostas pode ser considerada uma mais-valia e permite ao projeto HyPro4ST experimentar soluções transversais.



## **5. Conclusões e recomendações**

O quadro da Análise das Necessidades tentou organizar de forma coerente um conjunto de informações, cuja síntese foi apresentada primeiro nos relatórios nacionais (aos quais se faz referência para mais informações) e depois no presente relatório final. Evidentemente, através da síntese, o Relatório Final perde alguns dados, mas permite-nos compreender os pontos mais importantes.

Os principais resultados de todos os relatórios nacionais realizados são os seguintes

- As sociedades estão a passar por grandes mudanças e as pessoas estão muito mais conscientes desse facto do que antes. As instituições públicas, as empresas e as comunidades locais consideram as transições ecológica e digital como um passo necessário para o seu desenvolvimento futuro.
- O turismo, talvez mais do que outros sectores, conhece esta dinâmica, como o demonstra o sucesso dos produtos ditos "experienciais" e a importância de práticas responsáveis como a do turismo regenerativo.
- Para enfrentar os desafios sociais, económicos e ambientais do nosso tempo, precisamos de cada vez mais competências de organização e de gestão. Estas competências dizem respeito não só aos aspetos técnicos, mas também à ética, à criatividade e à inovação.
- A formação desempenha um papel crucial neste sentido, mas nem sempre consegue acompanhar a evolução dos tempos.
- Quando a gestão das organizações se inspira nos métodos de gestão de projetos, uma solução mista (e, portanto, híbrida) entre abordagens tradicionais e flexíveis parece ser a mais eficaz. No entanto, este conceito não está muito difundido nas organizações turísticas, sobretudo se forem de pequena dimensão.

Alguns aspetos foram salientados pelos parceiros nos seus respetivos relatórios nacionais. Estes aspetos são muito interessantes, pelo que é útil referi-los nas conclusões. Na sua maioria, são temas gerais que dizem respeito a todos os países participantes, mas nalguns casos, referem-se especificamente ao contexto de um único país. Assim, devem ser entendidos considerando esta dupla perspetiva; global e nacional. Como mencionado nos relatórios nacionais:

- Há uma necessidade urgente de desenvolver os recursos humanos na indústria do turismo devido à falta de certas competências, especialmente as competências transversais e a literacia digital.
- Os programas de gestão de projetos não se centram na ligação entre as práticas de gestão de projetos e o turismo sustentável e a gestão de projetos híbridos.

- Os gestores de projetos devem tornar-se peritos multidisciplinares capazes de colaborar com várias partes interessadas no desenvolvimento do turismo sustentável.
- A sustentabilidade não é um conceito desconhecido, pode ser encontrado em muitos sítios, mas na maioria dos casos como um elemento obrigatório sem qualquer conteúdo subjacente.
- No ensino superior, o turismo é uma disciplina estabelecida em muitas instituições, mas o número de estudantes está a diminuir e o currículo não está à altura dos padrões modernos.
- A abordagem de gestão está completamente ausente tanto da educação como da implementação prática do turismo. Nesta perspetiva, o perfil do "Gestor de Projetos Híbridos e Sustentáveis" e a formação necessária para o efeito são urgentemente necessários.
- Surgiu uma necessidade de competências transversais e flexíveis, uma função que pode ser bem desempenhada pelo Gestor de Projetos Híbridos e Sustentáveis.
- O perfil do novo gestor ainda não é totalmente compreendido por quem trabalha no mundo do turismo e, por conseguinte, deve ser implementada uma estratégia que facilite a correspondência entre a oferta e a procura.
- São necessárias novas competências para os profissionais do turismo, entendendo que as competências transversais são tão importantes como as competências técnicas, bem como a criatividade, a inovação, o empreendedorismo, a sustentabilidade e outras competências que podem ser alinhadas com as tendências do mercado.
- Apesar da necessidade de novas competências a que o Gestor de Projetos Híbridos e Sustentáveis pode dar resposta, a qualidade da formação em turismo [em Portugal] é avaliada positivamente.
- Existe uma boa compreensão da transição sustentável e os trabalhadores vêem o seu papel e o da empresa nessa transição. Menos compreendida é a necessidade de melhorar as competências digitais.
- Embora as empresas dos entrevistados utilizem práticas de gestão de projetos e desenvolvam abordagens híbridas, os trabalhadores estão menos sensibilizados para essas práticas.
- Existe um grande interesse por parte dos inquiridos em participar no curso "Gestor de projetos híbridos em turismo sustentável".
- As competências que podem beneficiar o perfil do Gestor de Projetos Híbridos e Sustentáveis no turismo sustentável dizem respeito a múltiplas competências relacionadas com a capacidade de trabalhar com dados e informações, competências

básicas de literacia digital e a capacidade de traduzir os princípios de sustentabilidade na prática.

- Há uma sensibilização para a transição digital e ecológica; no entanto, é necessário intensificar as soluções inovadoras e implementar competências ecológicas e digitais através da atualização das qualificações.
- A gestão de projetos sustentáveis e híbridos para o turismo sustentável não está totalmente refletida nas atuais qualificações para o turismo, mas essa qualificação está a tornar-se mais relevante.

Algumas recomendações finais, resultantes da investigação efetuada através da Análise das Necessidades em todos os países parceiros, levam-nos a concluir que tal seria necessário:

1. investir em ferramentas de aprendizagem digitais/híbridas de alta qualidade: são necessárias novas competências altamente especializadas, mas ao mesmo tempo flexíveis, capazes de se adaptarem às mudanças económicas, sociais e culturais que a sociedade está a viver e de garantirem serviços mais modernos e adequados para todos. As universidades e os sistemas de formação têm uma grande responsabilidade neste sentido, e um projeto como o HyPro4ST pode ajudar nesse aspeto se for devidamente divulgado;
2. ligar cada vez mais os organismos públicos e privados aos territórios, ou seja, ter mais em conta as necessidades expressas pelas comunidades locais, também no sector do turismo. De facto, as melhores práticas são frequentemente as que emergem das experiências locais, incluindo as atividades empresariais;
3. melhorar os níveis de conhecimento e de aplicação das estratégias de gestão de projetos: isto deve ser feito especialmente nas pequenas empresas e nos organismos públicos. A análise das necessidades revelou uma falta de conhecimento dos modelos de gestão, incluindo o modelo híbrido, mas também a necessidade de aplicar competências e estratégias deste tipo nos contextos organizacionais analisados pelo inquérito;
4. pensar o turismo tendo em conta, por um lado, as questões emergentes (sustentabilidade, transição verde, digitalização, inovação, criatividade, ética e responsabilidade, etc.) e, por outro, as respostas eficazes que podemos dar, tentando combinar os dois fatores: neste sentido, o projeto HyPro4ST pode constituir uma boa base de experimentação porque propõe uma abordagem de gestão para a produção e distribuição de serviços turísticos em conformidade com as tendências do mercado. No entanto, deve ser bem-apresentado ao mundo do turismo.

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**NOTICE: FROM THIS POINT ONWARDS, THE INFORMATION CONTAINED IN THE FOLLOWING CHAPTERS (ANNEXES) IS QUOTED EXACTLY AS IT WAS INCLUDED IN THE ORIGINAL FILE OF D2.1 LABOUR MARKET NEEDS REPORT AND IN THE OFFICIAL LANGUAGE OF THE PROJECT (ENGLISH).**

## **Anexo A. Diretrizes para a elaboração dos relatórios nacionais**

### **Annex A. Guidelines for the development of the national reports**

In this annex the documents prepared for the partners and approved by the consortium to use as a basis to develop their national reports are presented. The documents include: a general overview of trends and labour market in the tourism sector, the questions developed for the online survey and the FGs/interviews, the methodological introduction to be followed, the guidelines for the desk research and also the document template (including structure and guidelines) proposed for the national reports.



General overview of trends and the labor market in the tourism sector (excerpts from the main official documents)						
N.	AUTHOR	DOCUMENT TITLE	YEAR	KEY TRENDS	ACTIONS TO TAKE	EMERGING THEMES
1	International Labour Organization (ILO)	The future of work in the tourism sector: Sustainable and safe recovery and decent work in the context of the COVID-19 pandemic	2022	<p>Emerging generations will become increasingly important in terms of overall tourism spending through 2040.</p> <p>Consumers are increasingly interested in sustainability, products and services that respect local cultures and protect the environment and biodiversity, creating a demand for a whole range of ecotourism-related services.</p> <p>The development of domestic, non-traditional and small scale tourism and ecotourism – as opposed to large-scale, mainstream tourism – is on the rise to meet the demands of emerging groups of consumers.</p>	<p>The tourism sector requires a range of skills for occupations in order to respond to new and emerging trends such as the advance of digitalization.</p> <p>There is a need to sustainably support conservation efforts through tourism and to invest in sustainable solutions for tourism that mitigate the impacts of tourism on the environment through, for example, better management of natural resources and promotion of use of sustainable materials</p> <p>The rebuilding process in the wake of the COVID-19 pandemic provides the opportunity to rethink the future of the tourism sector and introduce greener, more sustainable models of tourism and generate green jobs within the sector.</p> <p>In addition to occupation-specific technical skills, a focus on multiskilling and core skills – including soft skills, information and communication technologies, customer interaction, workplace organization and management – is of key importance to the sector.</p>	There is a strong demand for sustainable products and experiences. It is strengthened by the effects of the COVID-19. The tourism sector needs specialist and transversal skills.
2	International Labour Organization (ILO)	ILO guidelines on decent work and socially responsible tourism	2017	Today's customers are increasingly interested in products and services respecting local cultures and protecting the environment and biodiversity.	The development of non-traditional tourism and small-scale tourism as opposed to large scale mainstream tourism is on the rise. This includes adventure tourism, cultural tourism, ecotourism, agro-tourism, medical and wellness cultural tourism, ecotourism, agro-tourism, medical and wellness tourism, technology-driven and on-demand accommodation platforms, tourism, technology-driven and on-demand accommodation platforms, low-cost services in transport, online booking and multigenerational travel.	People-oriented tourism products, those involving the use of new technologies and slow tourism are successful models.
3	Organization for Economic Cooperation and Development (OECD)	Preparing the Tourism Workforce for the Digital Future	2021	<p>Digitalisation initiatives have had some difficulties in engaging SMEs, and especially smaller SMEs (micro-businesses), which may stem from some systemic challenges to helping those firms most likely to benefit from digital transformation.</p> <p>In all sectors (including tourism) survival in the jobs market requires an appropriate mix of [...] digital competencies with cognitive skills (such as problem-solving, creativity, learning to learn, etc.) and socio-emotional skills (such as communication, collaboration, etc.).</p>	<p>Building SME digitalisation and skills adjustment exemplars through 'pathfinder' or similar initiatives to identify good practices in digital transformation, and the benefits of building COVID-19 recovery and resilience at the enterprise level.</p> <p>Digital skills deemed essential to underpin a quality tourism experience in the context of growing digitalisation in the sector: 1) digital tourism marketing sales professionals; 2) specialists in new technologies and tourism innovations; 3) tourism business development managers; 4) tourism information technology services.</p>	Today the digital transition is a fundamental step in development.

**Figure 2: General Overview of trends and labour market in tourism – Page 1**



General overview of trends and the labor market in the tourism sector (excerpts from the main official documents)						
N.	AUTHOR	DOCUMENT TITLE	YEAR	KEY TRENDS	ACTIONS TO TAKE	EMERGING THEMES
4	Organization for Economic Cooperation and Development (OECD)	Better Use of Skills in the Workplace. Why It Matters for Productivity and Local Jobs	2017	Expected changes in the workplace as a result of the megatrends – technological change, population ageing and globalisation suggest that making good use of skills will be critical.	<p>Specialised, technical expertise is needed to get employer buy-in and affect change.</p> <p>Facilitation experience and skills can best be developed, particularly in terms of the ability to be flexible, innovative and resilient when things did not go to plan or organisations are less responsive than anticipated.</p>	Flexibility, innovation and resilience are important characteristics of contemporary skills.
5	Organization for Economic Cooperation and Development (OECD)	OECD Tourism Trends and Policies 2022	2022	<p>Tourism remains seriously challenged by the unprecedented depth and duration of the COVID-19 shock. The recovery is fragile and uneven across countries however, with new uncertainties from the economic slowdown and geopolitical instability, precipitated by Russia's war in Ukraine. Domestic tourism has helped sustain the sector, but cannot compensate for the loss of international tourism. The full recovery of international tourism is now expected to take up until 2025, or beyond.</p> <p>Tourism businesses, already struggling to recover from the pandemic, are now also facing rising energy, food and other input costs, as well as labour shortages and skills gaps.</p> <p>Job retention schemes helped mitigate the impact of the pandemic on tourism employment, but labour shortages and skills gaps risk constraining the recovery.</p>	<p>Restoring safe mobility and consumer confidence continues to be a priority, along with supporting fragile tourism businesses and destinations confronted by labour and skills shortages, and investment needs to diversify the tourism offer. Looking forward, accelerated action is needed on greening the recovery and climate change, and the mitigation and adaptation measures required, including financing and investment, for tourism to play its part. At the same time, actions are needed to ensure that the sector is fully able to benefit from opportunities presented by the digital transition</p> <p>Foster a business environment where tourism SMEs can succeed and get stronger, by improving access to finance, building skills and capacity, and promoting greener, digital practices.</p> <p>Businesses are at the forefront of the green transition, with the many small and medium sized businesses (SMEs) that connect the visitor with the place through creating experiences having a particularly critical role to play.</p> <p>Invest in skills to ensure the availability of a qualified workforce and attractive careers in the ecosystem.</p> <p>Goals of the EC include: 1) strengthening the attractiveness of the tourism sector and knowledge of the diversity of jobs and professional opportunities; 2) facilitating recruitment, particularly in jobs with significant needs for the coming seasons and in view of the major events to come; 3) attracting more young people to training courses leading to these professions.</p>	Supporting fragile tourism businesses and communities, deploying labour force and skills, greening recovery and climate change mitigation measures are the new priorities of the modern productive systems. Investing in sustainability can be a competitive factor.

Figure 3: General Overview of trends and labour market in tourism – Page 2

General overview of trends and the labor market in the tourism sector (excerpts from the main official documents)						
N.	AUTHOR	DOCUMENT TITLE	YEAR	KEY TRENDS	ACTIONS TO TAKE	EMERGING THEMES
6	World Travel & Tourism Council (WTTTC)	Travel & Tourism Economic Impact 2022	2022	<p>Forecast for Europe: in 2022, the region's Travel &amp; Tourism sector is estimated to expedite its pace of recovery to 31.4% and nearly reach its prepandemic level by the end of 2023. Between 2022 and 2032, the sector is forecasted to grow at an average annual rate of 3.3%— outpacing the 1.5% growth estimated for the regional economy. By the end of 2032, the sector is also estimated to create nearly 8 million new jobs compared to 2022.</p> <p>Following a period of lockdowns and isolation, travellers are showing a preference to travel to less crowded and even unfamiliar destinations. Indeed, there has been increased interest in exploring secondary destinations and nature. During this period, travellers have become more committed to sustainability, which in turn is affecting their travel choices. The lockdowns have also shone a brighter light on wellness and overall health, driving more consumers to seek out further wellness experiences.</p> <p>As demand for travel and jobs starts to rise, a sufficient labour force is required to fill the available vacancies and enable the sector to recover.</p>	<p>Recommendations: 1) facilitate labour mobility; facilitate flexible and remote work; 2) enable decent work and provide competitive employee benefits; 3) develop and support a skilled workforce; 4) promote opportunities within the sector; 5) strengthen coordination and collaboration at all levels; 6) adopt technological and digital solutions.</p>	Increases the interest of the tourist market towards alternative destinations and products. Tourists' choices are more responsible. The labor market requires new strategies to improve skills and abilities.
7	World Tourism Organization (UNWTO)	The Future of Work and Skills Development in Tourism	2019	<p>Emerging realities: 1) the emergence of the so-called exponential organizations (ExOs) -newly created organizations, of reduced structure, that, in a very short time, with the advanced use of technology boost their exponential growth and with a disruptive concept of market (Uber, Airbnb, Instagram, etc.), are now top-of-mind among consumers; 2) the emergence of 'regulated innovation' environment -a context where new organizations act in areas not sufficiently legislated; 3) the emergence of agile organizations; 4) the emergence of the 'liberation' of the workforce phenomenon -growth of independent and autonomous work, mobility, flexibility or project-based work are redefining the [...] traditional work context;</p>	<p>Consequences: 1) for public policies, the need to identify [...] what new functions and jobs are being created; 2) for the organizations' leaders, their ability to adapt structures to the new forms of work will be key, especially in areas related to the management of people and the promotion of autonomy in decisionmaking at all levels; 3) for any professional, it will be critical to develop their skills continuously.</p>	The labour market in the tourism sector has been hit hard by the crises and now the old models have been replaced. It is necessary to rethink the traditional organization of work.
8	UNWTO	Recommendations for the Transition to a Green Travel and Tourism Economy	2021			
9	World Tourism Organization (UNWTO)	UNWTO World Tourism Barometer	2022	<p>The uncertain economic environment seems to have nonetheless reversed prospects for a return to pre-pandemic levels in the near term. The economic environment continues to be the main factor weighing on the recovery of international tourism. Rising inflation and the spike in oil prices results in higher transport and accommodation costs, while putting consumer purchasing power and savings under pressure.</p>		The world tourism market is recovering but time is still needed for it to return to pre-COVID-19 levels.

Figure 4: General Overview of trends and labour market in tourism – Page 3

General overview of trends and the labor market in the tourism sector (excerpts from the main official documents)						
N.	AUTHOR	DOCUMENT TITLE	YEAR	KEY TRENDS	ACTIONS TO TAKE	EMERGING THEMES
10	Deloitte	2022 Deloitte travel outlook. The winding path to recovery	2022	The pandemic has brought changes to the way we live and work. Some of those changes are likely to continue to affect travel once the health crisis subsides.	Half of the interviewed companies say they are optimizing their business travel policies to support sustainability goals. Increased interest in alternative accommodations will likely continue to push hospitality providers to evolve.	The changes caused in consumption patterns by the pandemics need adequate, dynamic responses.
11	Next Tourism Generation (NTG) Alliance, European Commission	Plan for Sectoral Cooperation to Address Skills Needs in the Tourism Sector. Blueprint for Tourism Sectoral Skills	2020	Digitalization, innovation, and societal changes have also emerged as some of the main concerns of the industry and changes have also emerged as some of the main concerns of the industry and changes have also emerged as some of the main concerns of the industry and education providers	Policies to be implemented: 1) facilitating and Strengthening Cooperation and Exchange of Good Practices in the Tourism Sector; 2) upskilling and Reskilling in the Tourism Sector, Promoting a Culture of Lifelong Learning for All; 3) establishing a Tourism Strategy for the Recovery of the Sector, Supporting, Creating and Taking Concrete Steps Towards Sustainability and Resilience; 4) education and Skills Development for Sustainability; 5) promoting Access to Education, Life-long Learning and Training in Tourism in Europe;	
				To build recovery in the next five years and the future, key priority policies must involve response measures to maintain capacity in the tourism sector and address skills needs and gaps. In addition, the importance of investing in reskilling and upskilling for tourism and hospitality recovery is fundamental.		
				Digitalization continues to accelerate, with higher use of contactless payments, services, virtual experiences and real time information. Training and retaining employees, subsidizing training for tourism industry workers, supporting sustainability through greening and digitalization and investing in training service providers are all key actions to prepare for the future, to develop competitiveness and to build resilience.		
12	Regerative Travel, CatchOn	Regenerative Travel Principles for Hospitality. White Paper	2020			
	Various authors	Scientific papers on the subject of Hybrid Project Management				
	Lalmia, A. , Fernandesb, G., Boudemagh Souada, S.	A conceptual hybrid project management model for construction projects, <i>ScienceDirect</i> : 921-930	2021			

**Figure 5: General Overview of trends and labour market in tourism – Page 4**

General overview of trends and the labor market in the tourism sector (excerpts from the main official documents)						
N.	AUTHOR	DOCUMENT TITLE	YEAR	KEY TRENDS	ACTIONS TO TAKE	EMERGING THEMES
13	Reiff, J., Schlegel, D.	Hybrid project management – a systematic literature review, <i>International Journal of Information Systems and Project Management</i> , 10(2):45-63	2022			
	Burukina, O.A.	Project Management in the Tourism Industry: the Basics of TMBOK, <i>MIR (Modernizatsiia. Innovatsii. Razvitie) = MIR (Modernization. Innovation. Research</i> , 10(1): 26–37	2019			

**Figure 6: General Overview of trends and labour market in tourism – Page 5**

Multiple options are allowed where indicated.

\* indicates mandatory question

**A. General instructions**

This survey is launched as the first consultation activity of the project “Sustainable Tourism Innovation Through Hybrid Project Management (HyPro4ST)”, a three-year project co-funded by the European Union under the Erasmus+ Programme, KA2: Cooperation Among Organizations and Institutions: Alliances for Innovation. The project aims to develop a new job “Sustainable and Hybrid Project Manager” profile for the Sustainable Tourism Sector and upskill professionals in sustainable, hybrid, digital, creative and entrepreneurship project management. The answers to this survey will help us determine the profile of the new Manager and make his/her placement on the labour market more effective. The survey takes about 10 minutes. Responses will be treated anonymously and the results will be used for research purposes only.

**B. Data of respondents**

\* Please indicate the sector in which you work

Private sector (include trade associations)	Public sector	NGO/ Not-for-profit organization	Educational	Other:

\* Which of the following describes best your current job/role?

Project manager	
Travel agency manager	
Destination manager	
Tour organizer	
Travel consultant	
Tour operator	
Entrepreneur	
Corporate Social Responsibility Manager	
Office Administrator/Support	
Professional in the Accommodation/Hospitality Industry	
Professional in the Creative and Entertainment Activities	
Professional in the Transportation Industry	
Professional in the Food & Beverage Industry (serving tourism)	
Professional in the Business Support Services (accountant, marketer, business consultant etc.)	
Student	
Adult Trainer	
Vocational Education and Training Provider	
Higher Education Professor	
Other, please specify:	

\* Age group

18 - 24	25 - 34	35 - 49	50 - 64	65 - 74	75+

\* Gender

Female	Male	Transmale	Transfemale	Nonconforming	Decline to answer	Other:

Figure 7: Survey questions – Part 1

**C. Sustainability, skills, training in the tourism systems**

1*	<p>What concrete actions should your organization implement to make tourism practices more sustainable?</p> <p><b>Please choose up to 3 answers (max).</b></p>	<p>Biodiversity conservation actions (e.g. better management of scarce natural resources)</p>	<p>Actions to tackle/mitigate climate change (e.g. improve the energy efficiency)</p>	<p>Actions to develop the circular economy (e.g. prioritize sustainable food approaches for circularity)</p>	<p>Actions to improve governance and finance (e.g. steer recovery funds towards tourism)</p>	<p>Actions that improve people's well-being and health (e.g. connect hygiene with sustainability)</p>	<p>Actions to promote social inclusion (e.g. support and involve vulnerable groups)</p>	<p>Other:</p>											
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2*	<p>What do you think are the reasons why your organization address or could address sustainability issues?</p> <p><b>Please choose up to 3 answers (max).</b></p>	<p>Align with our goals, mission and values</p>	<p>Meets consumer/customer expectations</p>	<p>Attract, motivate, and retain employees</p>	<p>Develop new growth opportunities</p>	<p>Response to competitive pressure</p>	<p>Improve operational efficiency</p>	<p>Build, maintain or improve corporate reputation</p>	<p>Comply with regulatory requirements</p>	<p>Other:</p>									
<table border="1" style="width: 100%; height: 20px;"> <tr> <td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td> </tr> </table>																			
3*	<p>Which of the following social sustainability actions should be considered a priority?</p> <p><b>Multiple answers are allowed.</b></p>	<p>Promotion of youth employment, particularly for young women</p>	<p>Measures that facilitate the transition of workers from the informal to the formal economy</p>	<p>Inclusion of workers with disabilities in the tourism labour force</p>	<p>Integration of migrants in the tourism labour force</p>	<p>Promoting a general environment of zero tolerance of violence and harassment, including gender-based violence</p>	<p>Ensure safety in the workplace</p>	<p>Ensure maternity protection</p>	<p>Other:</p>										
<table border="1" style="width: 100%; height: 20px;"> <tr> <td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td> </tr> </table>																			
4*	<p>Which of the following actions/measures should be implemented to revitalize the tourism sector?</p> <p><b>Multiple answers are allowed.</b></p>	<p>Green transition</p>	<p>Safeguard of the health of residents and visitors</p>	<p>Digital transition and smart technologies (e.g. open data)</p>	<p>Skills, education and training</p>	<p>Public administration and governance</p>	<p>Competitiveness</p>	<p>Financial sector and access to finance</p>	<p>Involvement of local communities</p>	<p>Other:</p>									
<table border="1" style="width: 100%; height: 20px;"> <tr> <td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td> </tr> </table>																			
5*	<p>Which of the following skills and abilities are the most important for people who want to work in the tourism sector?</p> <p><b>Multiple answers are allowed.</b></p>	<p>Focus on the client</p>	<p>Technological and digital capabilities</p>	<p>Creativity and innovation</p>	<p>Flexibility and adaptability</p>	<p>Ability to work in a team</p>	<p>Commitment to work</p>	<p>Other:</p>											
<table border="1" style="width: 100%; height: 20px;"> <tr> <td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td> </tr> </table>																			
6*	<p>Which of the following environmental skills should be implemented to improve the competitiveness of tourism systems?</p> <p><b>Multiple answers are allowed.</b></p>	<p>Promotion of environmentally friendly activities and products</p>	<p>Promotion of sustainable forms of transport (e.g. public transport)</p>	<p>Knowledge of climate change</p>	<p>Ability to minimize use and maximize energy and water efficiency consumption</p>	<p>Ability to manage waste, waste water, recycling and composting</p>	<p>Conservation of biodiversity</p>	<p>Other:</p>											
<table border="1" style="width: 100%; height: 20px;"> <tr> <td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td> </tr> </table>																			
7*	<p>Which of the following digital skills should be implemented to improve the competitiveness of tourism systems?</p> <p><b>Multiple answers are allowed.</b></p>	<p>Operating system usage and computer programming skills</p>	<p>Skills for implementing online safety procedures</p>	<p>Online marketing and communication skills</p>	<p>Desktop publishing skills (for designing brochures, catalogues, etc.)</p>	<p>Website development skills</p>	<p>Social media skills</p>	<p>Data analytics, business intelligence, big data skills</p>	<p>Artificial intelligence and robotics skills</p>	<p>Other:</p>									
<table border="1" style="width: 100%; height: 20px;"> <tr> <td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td> </tr> </table>																			

Figure 8: Survey questions – Part 2

8\* In which of the following areas of entrepreneurship would you like to improve your skills?  
**Multiple answers are allowed.**

Creativity and innovation	Design thinking methodology for developing customer-centred products/services/experiences	Business strategy development	Business model development	Branding strategy development	Marketing strategy development	Corporate social responsibility	Other:
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

9\* Which of the following soft skills do you think you need to improve?  
**Multiple answers are allowed.**

Critical thinking	Exploratory thinking	Change management	Flexibility/adaptability	Emotional intelligence	Leadership	Communication	Idea pitching (the art of presenting)	Collaboration	Networking	Learning how to learn	Promoting Diversity, Equity and Inclusion (DEI) in the workplace	Customer service	Other:
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

10\* What is the most effective form for training a tourism professional?

Through face-to-face training	Through online training	Through tutors at work	Learning-by-doing	Other:
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**D. The Hybrid Project Management profile**

11\* Which of the following practices do you use to perform your daily tasks?  
**Multiple answers are allowed.**

Project management platforms (e.g. MS Project, Basecamp, Jira etc)	Specific project management templates (e.g. project charter, stakeholders register, status report, meeting agenda/minutes etc.)	Key performance indicators for measuring quality, impact and success	I do not implement any of these practices	Other:
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

12\* Please indicate the extent to which you use the following processes to implement your projects and/or perform your daily tasks.

	Not at all	To some extent	Greatly
Project Integration Management (coordinating all elements of a project, including tasks, resources, stakeholders and deliverables)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Project Scope Management (defines and outlines all of the work that is included within a project, including objectives, tasks, outputs and deadlines)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Project Time Management (processes required for the on-time completion of the project)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Project Cost Management (processes involved in planning, estimating, budgeting and controlling costs)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Project Risk Management (the process of identifying, analyzing and responding to any risks that arise)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Project Quality Management (the process of continually measuring the quality of all activities and taking corrective actions to achieve the desired quality)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Project Procurement Management (processes required to purchase or acquire the products, services or results needed from outside the project team)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Project Human Resource Management (includes the organization and management of the project team – assigning roles and responsibilities)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Project Communications Management (processes required to ensure timely and appropriate generation, collection, distribution, storage, retrieval and ultimate disposal of project information)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

13\* Do you think it is more beneficial for a tourism business to be flexible, manage change and follow the market than to apply medium-long term planning?

strongly agree	agree	don't know	disagree	strongly disagree
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Figure 9: Survey questions – Part 3

14*	In your organization the approach to project management (i.e. the use of specific knowledge, skills, tools and techniques to deliver something of value to people) is:	Traditional, i.e. based on the breakdown of project activities into linear sequential phases ('waterfall' approach)	Flexible and innovative, able to adapt quickly to change with versatile strategies and targeted interventions ('agile' approach)	Primarily focused on user/customer satisfaction ('lean' approach)	Holistic, i.e. combines some or all of the previous approaches ('hybrid' approach)	I don't think my organization deals with project management	I don't know / I am not familiar with these terms	Other:

15*	Please indicate whether and to what extend your organization uses the following project management methodologies when implementing projects/day-to-day operations:  Project management methodology: principles, tools and techniques used to plan, execute and manage projects. Waterfall Methodology Agile Methodology Hybrid Methodology Green PM Methodology Scrum Methodology Project Management Body of Knowledge (PMBOK) Critical Path Method (CPM) Critical Chain Project Management (CCPM) Kanban Methodology Extreme Programming (XP) Lean Methodology Six Sigma PRINCE2	Not at all	To some extent	Greatly	I don't know / I am not familiar with these terms

16*	In your opinion, can a hybrid project manager, able to implement planning effectively but also to adapt quickly to changes, be considered a competitive resource for tourism businesses and public bodies responsible for tourism policies?	Strongly agree	Agree	I don't know	Disagree	Strongly disagree

17*	Does your organisation include in its organizational chart an official job position entitled "Project Manager"?	Yes	No	I don't know

Figure 10: Survey questions – Part 4



18*	Please indicate you agree with the following statement: "My project management skills are satisfactory."	Strongly agree	Agree	I don't know	Disagree	Strongly disagree						
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19*	Do you have any certification in project management?	Yes	No									
		<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; height: 20px;"></td> <td style="width: 50%;"></td> </tr> </table>										
20*	Would you be interested in attending a free training course entitled "Sustainable Hybrid Project Management for the Tourism Sector"?	Yes	No									
		<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; height: 20px;"></td> <td style="width: 50%;"></td> </tr> </table>										
21	If yes, please specify why:	It is free of charge	I have spare time	I want to improve my existing knowledge	I want to learn something new	Other:						
		<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 20%; height: 20px;"></td> <td style="width: 20%;"></td> <td style="width: 20%;"></td> <td style="width: 20%;"></td> <td style="width: 20%;"></td> <td style="width: 20%;"></td> </tr> </table>										

**E. Final communications**

Thanks for your collaboration! If you wish to be kept informed of the progress of the project, please provide us with the data below, which will be treated in compliance with current privacy regulations.

Name	
Surname	
Organization	
Email	

*Figure 11: Survey questions - Part 5*

What should emerge from the Focus Groups/Interviews		
1	The most relevant changes that the interviewee observes in the world of tourism on a global scale - What are the most important changes that you observe in the world of tourism on a global scale?	<p>Greater attention to sustainability and ethical behavior (less consumption, greater respect for local populations, etc.)</p> <p>Less propensity to travel (a phenomenon that could persist)</p> <p>Greater interest in alternative and less known destinations (rural villages, trails, etc.)</p> <p>Need for stronger cooperation and alliances to face the challenges of the global market and to improve competitiveness</p> <p>Development of digital experiences, automation and new technologies</p> <p>Other</p>
		Some examples:
2	Also in their own country - What is the state of sustainable tourism in your country?	The discussion should also concern the region or territory of the interviewee, where the perception of changes is more direct
3	Which of these social sustainability actions should be considered a priority?	The question aims to have 'points of view' not only on the workforce made up of migrants but also on the issues of social sustainability in work
		Youth employment promotion, particularly for young women
		Measures that facilitate the transition of workers from the informal to the formal economy
		Integration of workers with disabilities in the tourism labour force
		Integration of migrants in the tourism labour force
		Promoting a general environment of zero tolerance of violence and harassment, including gender-based violence
		Ensure safety in the workplace
		Ensure safety in the workplace
Ensure maternity protection		
Other		
4	Are you familiar with the term "regenerative tourism"?	The moderator should first know this type of tourism and possibly explain it during/after the participants' speeches
5	(Follow up question) Do you think it is a tourism practice that will be increasingly successful in the future? If so, what should a tourist destination do to implement it?	The answers should be preparatory to the reasoning that will be developed immediately after regarding the skills and the function of the Hybrid Project Manager
	Responsible behavior is typical of regenerative tourism (for example, buying from local businesses and establishments, helping clean up and restoring the environment, collaborating on social projects that need help). Do you think it would be useful to create a professional regenerative tourism management system?	
6	Is the concept of sustainable tourism taught in regular (higher) education programs, in vocational training (VET) or in adult training in general?	

Figure 12: Focus Groups/Interviews and desk research questions – Part 1



Sustainability, skills, training in the tourism systems

7	Which institutions offer courses on sustainable tourism (Universities, VET providers, adult training institutions, private institutes/schools, etc)?									
8	Does the provision of the training on sustainable tourism incorporate creativity and entrepreneurship skills (Designing and implementing customer-centred projects by deploying Design Thinking, Essential Entrepreneurial Skills for the Sustainable Hybrid Project Manager or other)?	These are questions that involve knowledge of the topics in question. Then the researcher will have to introduce the topics with an explanation.								
8	Does the provision of the training on sustainable tourism incorporate digital skills (Online Management Systems, Operating Systems Use skills, MS Office, Social Media Management, Website Management or other)?									
10	Does the provision of the training on sustainable tourism incorporate resilient skills such as Leadership, Emotional Intelligence, Adaptability, Flexibility and Change Management, Communication and Collaboration, Idea Pitching, Becoming an Independent Learner, Inclusion and Diversity in the Workplace?									
11	<i>If the interviewee is of the opinion that training projects of this type (even if not known directly) can bring benefits to the tourism system of his country - Do you believe that this type of projects can bring benefits to the tourism system of his country?</i>	It is advisable that the reflections on the possible benefits also concern the interviewee's territory (local tourism system), with which they might have greater confidence								
12	<i>If the current training system for the tourism sector is considered by the interviewee to be adequate for the challenges of the market - Do you believe that the current training system for the tourism sector is adequate for the challenges of the market?</i>	The reasons for a positive or negative response should be explored								
13	<i>If the interviewee has opinions and suggestions regarding training paths that should be created or implemented - What training methods and techniques are mostly used and are suitable for tourism professionals' training?</i>	The opinion may concern higher education or professional courses, university courses, or other								
14	What would tourist places and destinations need today to improve inbound tourism?	The question should lead the interviewee to reflect on the professional skills needed to develop tourist flows								
15	What will be the most requested profiles in the tourism sector in the next five years?	The interviewer can choose one of the following profiles	<table border="1"> <tr><td>Direct customer service/customer care</td></tr> <tr><td>Commercial</td></tr> <tr><td>Digital/IT</td></tr> <tr><td>Operations</td></tr> <tr><td>Data analytics</td></tr> <tr><td>Leadership/management</td></tr> <tr><td>Administration/finance</td></tr> </table>	Direct customer service/customer care	Commercial	Digital/IT	Operations	Data analytics	Leadership/management	Administration/finance
Direct customer service/customer care										
Commercial										
Digital/IT										
Operations										
Data analytics										
Leadership/management										
Administration/finance										
16	What are the environmental issues that will condition the future of our society?	The answer must indicate one of the following possibilities	<table border="1"> <tr><td>Promotion of environmentally friendly activities and products</td></tr> <tr><td>Promotion of sustainable forms of transport (e.g. public transport)</td></tr> <tr><td>Knowledge of climate change</td></tr> <tr><td>Ability to minimize use and maximize energy and water efficiency consumption</td></tr> <tr><td>Ability to manage waste, wastewater, recycling and composting</td></tr> <tr><td>Conservation of biodiversity</td></tr> <tr><td>Other</td></tr> </table>	Promotion of environmentally friendly activities and products	Promotion of sustainable forms of transport (e.g. public transport)	Knowledge of climate change	Ability to minimize use and maximize energy and water efficiency consumption	Ability to manage waste, wastewater, recycling and composting	Conservation of biodiversity	Other
Promotion of environmentally friendly activities and products										
Promotion of sustainable forms of transport (e.g. public transport)										
Knowledge of climate change										
Ability to minimize use and maximize energy and water efficiency consumption										
Ability to manage waste, wastewater, recycling and composting										
Conservation of biodiversity										
Other										

Figure 13: Focus Groups/Interviews and desk research questions – Part 2



17	Which digital skills, among the following, should be implemented to improve the competitiveness of tourism systems?	The answer must indicate one of the following possibilities	Operating system use an computer programming skills
			Skills for implementing online safety procedure
			Online marketing and communication skills
			Desktop publishing skills (for designing brochures, catalogues, etc.)
			Website development skills
			Data analytics, business intelligence, big data skills
Artificial Intelligence and robotics skills			
18	What is the best approach that a project manager should have when performing their work?	The answer should make it clear whether the respondent knows the project management sector and above all if, according to them, the "hybrid" approach can generate greater effectiveness. Given the specificity of the question, it is suggested that the moderator/interviewer first delves into the topic	
			The answer must indicate one of the following possibilities
			Traditional, i.e. based on the breakdown of project activities into linear sequential phases ('waterfall' approach)
			Flexible and innovative, able to adapt quickly to change with versatile strategies and targeted interventions ('agile' approach)
19	Do you know who the Hybrid Project Manager is? And what kind of work do they do?	The question will probably require explanation	Primarily focused on user/customer satisfaction ('lean' approach)
			Holistic, i.e. combines some or all of the previous approaches ('hybrid' approach)
20	Do you know any training courses or University courses dealing with the subject of Hybrid Project Management?	If the answer is positive, it is useful to take note of it for further information related to the project	
21	What are the identified best practices in your country regarding the above-mentioned fields (offered trainings, training methods, recognition paths/qualification validation methods)?		
	What are the best practices you may have identified at European level while implementing your research regarding the above-mentioned fields?		
22			
23	Do you have final thoughts to share?		

**Glossary - Definitions**

1	Regenerative Tourism	<p>Regenerative tourism represents a sustainable way of travelling and discovering new places. Its main goal is for visitors to have a positive impact on their holiday destination, meaning that they leave it in a better condition than how they found it. A concept that goes beyond "not damaging" the environment and that aims to actively revitalise and regenerate it, resulting in a positive cycle of impacts on local communities and economies: sustainable regeneration. Concrete examples include farmers that together with tourism professionals restore degraded lands (desert), local communities conserving pristine rainforest with ecologists, or restoring biodiversity by stopping livestock grazing and reintroducing wild animals.</p> <p>Source: <a href="https://tinyurl.com/2dmrvx3y">https://tinyurl.com/2dmrvx3y</a></p>
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Figure 14: Focus Groups/Interviews and desk research questions – Part 3

2	Sustainable Tourism	<p>Tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities.</p> <p>Source: <a href="https://tinyurl.com/yz4d73z8">https://tinyurl.com/yz4d73z8</a></p>
3	Hybrid Project Management	<p>Hybrid project management blends the best elements of traditional and agile project management approaches in order to deliver superior results. Hybrid project management refers to a combination of Agile (modern) and waterfall (traditional) methodologies.</p> <p>Source: <a href="https://www.4pmti.com/learn/hybrid-project-management/">https://www.4pmti.com/learn/hybrid-project-management/</a></p>
4	Design Thinking	<p>Design thinking is thinking about design or maybe even thinking before design. It's a process of watching people work, learning how they live their lives, and finding solutions to the difficulties they face each day. The next step is to gather up all that information, sort it, and look for patterns. Using those patterns, decide on a plan of action, brainstorm ideas with diverse and multidisciplinary teams, make a model or prototype, and then rework and tweak the invention until it does what it is supposed to.</p> <p>Source: <a href="https://tinyurl.com/4pkbdk7m">https://tinyurl.com/4pkbdk7m</a></p>

**Figure 15: Focus Groups/Interviews and desk research questions – Part 4**



## Work Package 2 Labour Market Needs Analysis and Development of a New Job Profile

### Methodological introduction

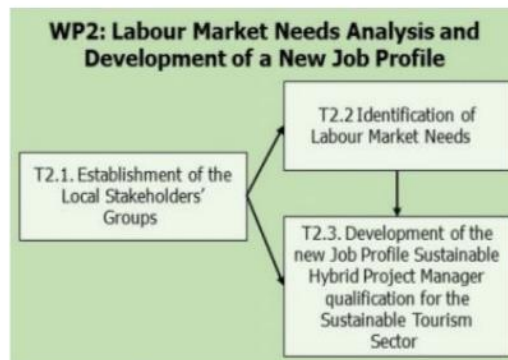
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#### Objectives

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«The main objectives of WP2 include the establishment of the Consultative Body of Experts (CBE), the creation of 6 focus groups and the development of an effective process allowing the flow and co-creation of applied knowledge between vocational education and training, higher education, research, and the public and business sector, providing the opportunity for staff members of organisations in the tourism sector to be involved into market-based research activities. Moreover, it seeks to identify specificities and challenges in each country regarding the sustainable tourism sector, by reaching and involving actively at least 300 stakeholders and to identify existing models of best practices, approximately 10, for the development of innovative hybrid project management, sustainable/green, ICT, creative, design thinking and soft skills acquisition, assessment tools and best training practices in vocational and adult training. Lastly, the ultimate objective of this WP is the development of a new Job Profile of the “Sustainable Hybrid Project Manager” qualification for the Sustainable Tourism Sector, that will respond to the skills and needs of the labour market».

Source: D1.1 Project Management Plan - WP1 - Project Management-Coordination and Reporting



**Figure 16: Methodological Introduction – Page 1**

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## Description of the activities

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The CBE will be composed of at least 12 experts in the fields of project management, sustainable tourism, vocational education and training and higher education.

### Task T2.1

The focus groups, one in each partner country, will be composed by 6 members, consisting of entrepreneurs, project and event managers, trainers and educators of higher and vocational education.

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«The aim of these two stakeholders' groups will be: To assure that the identification of the best practices in vocational and higher education and training in the fields of hybrid project management, sustainability in tourist sector, digitalisation of the sector, resilience skills (soft skills) education and training will be materialised, as well as the differences in each partner country (T2.2); Support the skills' gap discovery in the tourist sector in the aforementioned fields (T2.2); Validate the proposed new job profile "Sustainable Hybrid Project Manager" qualification for the Sustainable Tourism Sector (T2.3); Test the proposed curriculum, training material, the Virtual Learning Hub and the online training course (VOOC) (WP3, WP4); Disseminate the results of the HyPro4ST project and further exploit its deliverables (WP6). SCN will lead this task with the contribution of all partners except for TUVA».

Source: D1.1 Project Management Plan - WP1 - Project Management-Coordination and Reporting

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## About the CBE

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It is advisable that each country identifies 2 subjects to be included in the Consultative Body of Experts (CBE). They should be experts in the fields of project management, sustainable tourism, vocational education and training and higher education. The purpose of its creation is to support the project by providing their expertise on the outcomes of the WP2, WP3, WP4, and WP5.

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## About the focus groups

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«The Focus Groups will be created with the participation of end-users appointed by the partners with sector specific expertise. The purpose of the focus groups will be to contribute to the project evaluation, review, and curricula development.



Focus groups feedback will be provided through questionnaires that will be filled in electronically. Six (6) Focus Groups will be created, one in each partner country, consisting of 6 members».

Source: D1.1 Project Management Plan - WP1 - Project Management-Coordination and Reporting

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### Task T2.2

Identify and summarise the best practices (approximately 10) deployed in other vocational/academic training programmes on hybrid project management, sustainability in the tourism sector, digitalisation, resilience skills (soft skills) needed in the sector, as well as the best training methods for the delivery of the trainings

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Conduct a Needs Analysis, using qualitative and desk research methods, in order to map the skills' gaps in the above-mentioned educational fields and the labour needs of the tourism industry in each country and at European level. At least 300 people, 50 per country, will be involved in this process.

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«The output will be a report, which will provide all the relevant information needed in order the partnership, in cooperation with the associated partners, the CBE and the Focus Groups, to develop a new job profile "Sustainable Hybrid Project Manager for the Sustainable Tourism Sector", which will be a new qualification standard for this profile and the training material for the education of these project managers».

Source: D1.1 Project Management Plan - WP1 - Project Management-Coordination and Reporting

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### About the best practices

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The 10 best practices will be identified through the focus groups and the desk research. Indications on case studies can be acquired also through interviews, if deemed appropriate. It is recommended that the 10 best practices cover various operational sectors of tourism: entrepreneurial, DMO or similar, University and training, related to local communities, business networks, in the digital, green and social sectors. To harmonize the contributions, each partner country will be able to cite 2 to 4 examples.

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### About the Needs Analysis

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The desk research is conducted first of all by analyzing some strategic documents of the main international institutions and companies operating in the market research sector. The information taken from the documents must be interpreted also taking into account the results of the questionnaire and the focus groups, as well as the interviews if deemed appropriate.



The following documents were used for the preparation of the questionnaire and the outlines of the focus group:

- Burukina, O.A. (2019), Project Management in the Tourism Industry: the Basics of TMBOK, *MIR (Modernizatsiia. Innovatsii. Razvitie) = MIR (Modernization. Innovation. Research*, 10(1): 26–37
- Deloitte (2022), 2022 Deloitte travel outlook. The winding path to recovery  
URL <https://www2.deloitte.com/us/en/pages/consumer-business/articles/travel-hospitality-industry-outlook.html>
- International Labour Organization (ILO) (2022), The future of work in the tourism sector: Sustainable and safe recovery and decent work in the context of the COVID-19 pandemic  
URL [https://www.ilo.org/sector/Resources/publications/WCMS\\_840403/lang--en/index.htm](https://www.ilo.org/sector/Resources/publications/WCMS_840403/lang--en/index.htm)
- International Labour Organization (ILO) (2017), ILO guidelines on decent work and socially responsible tourism  
URL [https://www.ilo.org/sector/activities/sectoral-meetings/WCMS\\_546337/lang--en/index.htm](https://www.ilo.org/sector/activities/sectoral-meetings/WCMS_546337/lang--en/index.htm)
- Lalmia, A., Fernandesb, G., Boudemagh Souada, S. (2021), A conceptual hybrid project management model for construction projects, *ScienceDirect*: 921-930
- Next Tourism Generation Alliance (NTG), European Commission (2020), Plan for Sectoral Cooperation to Address Skills Needs in the Tourism Sector. Blueprint for Tourism Sectoral Skills  
URL <https://nexttourismgeneration.eu/wp-content/uploads/2022/06/Final-Next-Tourism-Generation-Blueprint-Report.pdf>
- Organization for Economic Cooperation and Development (OECD) (2021), Preparing the Tourism Workforce for the Digital Future  
URL <https://www.oecd.org/publications/preparing-the-tourism-workforce-for-the-digital-future-9258d999-en.htm>
- Organization for Economic Cooperation and Development (OECD) (2021), OECD Tourism Trends and Policies 2022  
URL <https://www.oecd.org/cfe/tourism/oecd-tourism-trends-and-policies-20767773.htm>
- Organization for Economic Cooperation and Development (OECD) (2017), Better Use of Skills in the Workplace. Why It Matters for Productivity and Local Jobs  
URL <https://www.oecd.org/publications/better-use-of-skills-in-the-workplace-9789264281394-en.htm>
- Reiff, J., Schlegel, D. (2022), Hybrid project management – a systematic literature review, *International Journal of Information Systems and Project Management*, 10(2):45-63



Regenerative Travel, CatchOn (2020), Regenerative Travel Principles for Hospitality. White Paper  
URL <https://www.regenerativetravel.com/principles-whitepaper/>

World Tourism Organization (UNWTO) (2022), UNWTO World Tourism Barometer  
URL <https://www.e-unwto.org/loi/wtobarometereng>

World Tourism Organization (UNWTO) (2021), Recommendations for the Transition to a Green Travel and Tourism Economy  
URL <https://webunwto.s3.eu-west-1.amazonaws.com/s3fs-public/2021-05/210504-Recommendations-for-the-Transition-to-a-Green-Travel-and-Tourism-Economy.pdf>

World Tourism Organization (UNWTO) (2019), The Future of Work and Skills Development in Tourism  
URL <https://www.e-unwto.org/doi/book/10.18111/9789284421213>

Other documents will be consulted during the work to ensure alignment with the objectives. These documents form the basis of knowledge and information for the development of the survey. The questionnaire was in fact drawn up taking into account the problems highlighted by each document analyzed.

Here are the steps: some **key trends** (excerpts from the documents) have been summarized in one column; in the next column, the **actions to take** (excerpts from the documents) that the authors consider particularly effective for adapting to trends have been highlighted; a third column indicates the **emerging themes** considered crucial for defining the design of the questionnaire and for conducting the interviews and focus groups.

General overview of trends and the labor market in the tourism sector (excerpts from the main official documents)					
AUTHOR	DOCUMENT TITLE	YEAR	KEY TRENDS	ACTIONS TO TAKE	EMERGING THEMES

See the file "Questionnaire+focus groups\_interviews\_draft DATE"

In particular, the following sources were taken into account for the technical elaboration of the questionnaire and questions to ask in focus groups:

European Centre for the Development of Vocational Training (CEDEFOP) (2016), The European skills and jobs survey (ESJS);

European Commission, Eurostat (2017), Qualitative Methodologies for Questionnaire Assessment;

Next Tourism Generation Alliance (NTG) (2020), Skills Assessment Methodology;

World Tourism Organization (UNWTO) (2019), The Future of Work and Skills Development in Tourism.



The topics covered by the questions and the content of the proposed answers have been reworked taking inspiration from official documents. In addition to those listed above, the following were consulted:

- i.e. for the question no. 1: UNWTO (2021), Recommendations for the Transition to a Green Travel and Tourism Economy  
URL <https://webunwto.s3.eu-west-1.amazonaws.com/s3fs-public/2021-05/210504-Recommendations-for-the-Transition-to-a-Green-Travel-and-Tourism-Economy.pdf>
- i.e. for the question no. 2 reworked from McKinsey & Co. (2021), How companies capture the value of sustainability: Survey findings  
URL <https://www.mckinsey.com/capabilities/sustainability/our-insights/how-companies-capture-the-value-of-sustainability-survey-findings>
- i.e. for the question no. 3: reworked from Sustainability for All, Regenerative Tourism: Discovering the World Sustainability  
URL [https://www.activesustainability.com/sustainable-development/regenerative-tourism/?\\_adin=02021864894](https://www.activesustainability.com/sustainable-development/regenerative-tourism/?_adin=02021864894)

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### Questionnaires guidelines

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Purpose	Conduct a Needs Analysis in order to map the skills' gaps in the educational fields and the labour needs of the tourism industry in each country and at European level
Number	50 questionnaires per country / region
Target interview participants	Senior managers; human resource managers; company owners; entrepreneurs; university professors; others.
Format	The layout of the online questionnaire is organized using "smart branching" to reduce complexity (Google form)
How to conduct	CAWI (Computer Assisted Web Interviewing)
Results	Findings and main results should be compiled into a comprehensive and structured report

The questionnaire is structured as an exploratory test, and is used to collect and process qualitative data. It includes 21 questions and should take no more than 10-15 minutes to complete, which is considered moderately adequate time so as not to over-involve the respondent. It is introduced by a brief explanation explaining the purpose of the survey and is organized into four sections, each of which should provide information on specific topics:

1. Data of respondents
2. Sustainability, skills, training in the tourism systems
3. The Hybrid Project Management profile
4. Final communication

**Figure 21: Methodological Introduction – Page 6**



The first section is used to briefly define the **profile** of the respondent.

The second section explores the perception that insiders have of **sustainability, skills and training**. The propensity to manage issues relating to sustainability can be considered as a positive factor, also in relation to the placement of a specific professional figure on the labour market. The section also should provide an overview of **professional needs** in the tourism sector, with particular attention to digital, green and training issues.

The fifth section is dedicated to **Hybrid Project Management** and aims to bring out useful elements for defining the managerial profile analyzed by the project.

The last section allows you **to retain the respondents** for future developments of the project.

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### Round table discussion (focus group) guidelines

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«An interviewing technique whereby respondents are interviewed in a group setting. It is used to stimulate the respondents to talk freely, and to encourage the free expression of ideas or explore attitudes and feelings about a subject. It is often used to explore the range or issues and respondent reaction to subject matter in order to guide the design of a questionnaire».

Source: OECD (2007), Glossary of Statistical Terms

Purpose	Conduct a Needs Analysis in order to map the skills' gaps in the educational fields and the labour needs of the tourism industry in each country and at European level
Number	<p>1 Round Table Discussion (focus group) per country with 6 participants each, divided as follows:</p> <ul style="list-style-type: none"> <li>2 travel agents / tour operators / trade associations / network organisations</li> <li>1 destination management organisations (local, regional, national)</li> <li>1 NGO/ not-for-profit organization</li> <li>1 educational/training sector</li> <li>1 digital company</li> </ul> <p><b>The composition is indicative and can be modified according to the needs of the partner/researcher</b></p>
Target interview participants	Senior managers; human resource managers; company owners; entrepreneurs; University professors, etc.
Duration	Maximum 2 hours
Consent form	Has to be signed by each participant
Recording	The discussion should be recorded; in case participants do not want this, notes should be taken



Format	Round Table Discussion conducted by a moderator, based on the interview guide provided below
How to conduct	Face-to-face or through online platforms
Results	Findings and main results should be compiled into a comprehensive and structured report

Round table (focus group) questions focuses on the three macro-topics, that we consider 'reading keys' because, in our opinion, they allow a critical reading of the current trends (here indicated as "sections"):

1. Sustainability, skills, training in the tourism systems
2. The Hybrid Project Management profile
3. Best practices

In here you will find information about the round table discussion that we need to conduct within the scope of needs assessment:

Information about the aim and structure of the round table discussion

- Instruction of technical aspects such are recording, a brief info on round table discussion as data collection methods
- A short, straightforward template for reporting the results
- Detailed structure of the round table discussion with topics and questions to prompt and guide discussion.

For more information on conducting a focus group, please consult the document **European Commission, Eurostat (2017), Qualitative Methodologies for Questionnaire Assessment**, URL <https://circabc.europa.eu/sd/a/7f617c55-1b01-41a5-96a4-966394f28b32/Methodological%20document%20-%20qualitative%20methods%20for%20pretesting.pdf>

### Aim of the RT (FG) discussion

The aim of the RT is to gain insights into problems related to sustainability in tourism from many different aspects, such as: markets trends and requests, etc.



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### Structure of participants

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Each participating country will hold 1 RT with 6 participants.

The target participants:

- Senior managers; human resource managers; company owners; entrepreneurs; University professors, etc.,
- Participants should come from: 2 travel agents / tour operators / trade associations / network organisations; 1 destination management organisations (local, regional, national); 1 NGO/ not-for-profit organization; 1 educational/training sector; 1 digital company. But the composition is indicative and can be modified according to the needs of the partner/researcher.

We have proposed to use a table for partners to use it as check box for their selection and identification of the participants of the focus group:

MANAGERS	NAME AND SURNAME OF PARTICIPANTS	COMPANY / INSTITUTION /ASSOCIATION, ...	FUNCTION	MAIN ACTIVITY	LOCATION	EMAIL
Participant 1						
Participant 2						

Additionally, participants will be updated with News from the project. They can be actively involved in all later stages of the project in line with their professional and/or personal interests.

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### Data recording

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**Records of the RT are strongly recommended.** Mainly there are two different ways of keeping records:

Recording on medium:

- Advantage: One can listen attentively and moderate the discussion.
- Disadvantage: Time-consuming post-processing

**Taking notes:**

- Advantage: Dialogue is more focused, written down information is more reduced, less time-consuming post-processing
- Disadvantage: Requires high level of concentration in dialogue and logging; lost information can only be reconstructed from memory



We propose **combination of both methods, pending participant consent for audio/video recording.**

---

### Basic information on RT (FG) method

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To the purpose of a targeted dialogue open questions should be used.

Open questions do not restrict the respondents in their answer on present alternatives. Open questions are especially suitable for the survey of experiences, opinions, attitudes, persuasions and values, if it is not likely that one can presume the answer. The respondents get the possibility to make free associations and to elucidate their personal perspective. In the focus group, moderators should predominantly ask open questions.

#### Taking up a Professional Stance on the Interviewee

The moderator should take up a respectful and empathic/assertive stance on the respondents and listen to them with attention and interest. Moderator should conduct discussion in a such way that all views are expressed, and all participants take part in discussion. He/she should avoid that a discussion is dominated by one or few participants, prompting those more reserved to take an active role in discussion.

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### About the questions

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The outline of the questions is the one contained in the sheet entitled 'Focus groups\_interv' of the Excel file 'Questionnaire+focus group\_interviews\_draft DATE'.

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### Interviews guidelines (optional)

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The focus group is a qualitative survey tool that complements desk research. However, researchers may decide to use the interview tool if:

- the focus group cannot be carried out in whole or in part;
- it is deemed useful to implement the research with interviews conducted with stakeholders, opinion leaders, eminent individuals who cannot be invited to the focus group.

In this case the outline for the interviews is the same as for the focus groups. It will be the responsibility of the interviewer to adapt the questions to the interlocutor.

---

Purpose	Conduct a Needs Analysis in order to map the skills' gaps in the educational fields and the labour needs of the tourism industry in each country and at European level
Number	Not specified. It depends on the purpose of the interview



Target interview participants	Stakeholders, opinion leaders, others
Duration	Around 30-45 minutes per interview
Consent form	Has to be signed by each participant
Recording	All interviews should be recorded; in case participants do not want this, notes should be taken
Format	Semi-structured interviews based on the interview guide provided below
How to conduct	Face-to-face/CAPI (Computer-Assisted Personal Interviews) or through online platforms
Results	Findings and main results should be compiled into a comprehensive and structured report

As in the case of focus groups, in order to be optimally prepared for interviews, interviewers are strongly advised to first study the project and its aims.

It is recommended to use semi-structured interviews. After having read, if possible, the documents in the bibliography (see previous list) and other specialist publications, more in-depth knowledge and new insights on the issues of skills transformation in tourism should be gathered. Interviews allow new insights and ideas to emerge during the interview as a result of the answers and elaborations of the interviewees. However, the insights gathered during the interviews still need to be compared. It is therefore advisable to follow the summary indications provided below and the outline of the questions contained in the specific Excel file (Questionnaire+focus groups\_interviews\_draft DATE), which the interviewer can adapt to the context of the interview and to the interview participants.

The interview is structured with an introduction and a closing of the activity, and the deepening of some macro-topics. As in the case of the focus groups, the questions emphasise four macro-topics, that we consider 'reading keys' because, in our opinion, they allow a critical reading of the current trends (here indicated as "sections"):

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## 2. Sustainability, skills, training in the tourism systems

## 3. The Hybrid Project Management profile

## 4. Best practices

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The interviewer is strongly advised to use these indications and to focus the interviews on the topics listed below in order to provide reliable and comparable qualitative data. At the same time, it will be possible to allow flexibility and to follow lines of research that may deviate from the indications when they offer the opportunity to identify new ways of seeing and understanding the themes of the interview.

Open-ended questions can be asked to obtain long answers and questions where the answer is brief and direct.





Some ideas for interviews:

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### Introduction to the project

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#### A.1. Background information for the interviewer:

The project “Sustainable Tourism Innovation Through Hybrid Project Management (HyPro4ST)” is a three-year project co-funded by the European Union under the Erasmus+ Programme, KA2: Cooperation Among Organizations and Institutions: Alliances for Innovation.

The project aims to:

- Develop a new job “Sustainable and Hybrid Project Manager” profile for the Sustainable Tourism Sector
- Upskill professionals in sustainable, hybrid, digital, creative and entrepreneurship project management.
- Helping alleviate the job losses, inequalities, and other risks.
- Build a talent pipeline that tourism sector can mine for future growth.
- Upscaling of VET and higher education trainers’ skills, to be able to adapt to the tourism labour market needs.

This multi-stakeholder partnership, comprising of 17 partners from 6 European countries, develops all the outputs in 7 EU languages, ensuring their cross-border transferability.

#### A.2. The outcome of this section:

The signed consent form

#### A.3. Content:

- Introduce yourself
- Explain the HyPro4ST project and the purpose of the interview (to map the skills’ gaps and opportunities in the educational fields and the labour needs of the tourism industry), and the use of the interview data (see above and in the file Excel)
- Point out the recording device and get the participant’s consent by letting him/her sign the consent form
- If the interviewee does not wish the interview to be recorded, this wish has to be granted and notes have to be taken instead.

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### Company/Institution and background information

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12

**Figure 27: Methodological Introduction – Page 12**



**B.1. Background information for the interviewer:**

A brief (anonymous) description of the company / association / organisation is important. It is also relevant to know “who is talking”.

**B.2. The outcome of this section:**

A brief (anonymous) description of the interviewee and company/institution.

**B.3. Possible questions:**

- Ask a few “warm-up” questions, such as the interviewee’s job title, responsibilities, time with the company, education or background;
- Activities, products, and location of the company/institution;
- Number of employees, how long in business;
- Other relevant points.

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**Training**


---

**1.1. Background information for the interviewer:**

The world of education should adapt to the changes affecting society, lifestyles and consumption patterns, especially as regards tourism. The problem is whether University and professional training is able to provide the skills necessary to manage these changes. It is important to have the opinion of the interviewees on these topics because the training envisaged by the project can play an important role in the placement of the new professional profile.

**1.2. The outcome of this section:**

Defining the current overview of the performance of the world of University and vocational training in the tourism sector to understand if it is suitable for the challenges of the contemporary age.

**1.3 Possible questions:**

For the trace of the questions, please refer to the appropriate sheet of the Excel file (Questionnaire\_draft DATE)

---

**Tourism**


---



**2.1. Background information for the interviewer:**

Several megatrends are influencing the future of tourism. Technological innovations will continue to impact tourism and change business models, jobs in tourism and tourist experiences. The inclusion of more sustainable practices is also a major topic in the consumption, production, and development of tourism. It is therefore important to know the interviewee's point of view on the future of tourism and on his/her company/institution.

**2.2. The outcome of this section:**

An understanding of the respondent's ideas about tourism and the tourism industry in general and your company in particular over the next five years.

**2.3 Possible questions:**

For the trace of the questions, please refer to the appropriate sheet of the Excel file (Questionnaire\_draft DATE)

---

**Skills**


---

**3.1. Background information for the interviewer:**

Traditional training is no longer able to provide adequate skills to make both professional qualifications and tourist destinations competitive. Changes in tourism practices are fast and intense. Highly specialized skills, but at the same time transversal and flexible, seem to be the most performing. Digital, environmental and social skills (personal skills, communication/cultural skills, and diversity skills) have become strategic.

**3.2. The outcome of this section:**

Obtaining elements that make the "Sustainable and Hybrid Project Manager" profile effective and performing.

**3.3 Possible questions:**

For the trace of the questions, please refer to the appropriate sheet of the Excel file (Questionnaire\_draft DATE)

---

**Hybrid Tourism Management**


---

**4.1. Background information for the interviewer:**

The commonly adopted project management approach is the traditional plan-driven model, which sometimes is not the most appropriate approach to complex construction projects subject to successive changes. A hybrid project management approach not only draws on traditional project management approaches, but also on agile and lean ones, and the results are probably better.



**4.2. The outcome of this section:**

Understanding if the market understands the concept of "Sustainable and Hybrid Project Manager" and if this professional expertise can be placed effectively on the market.

**4.3 Possible questions:**

For the trace of the questions, please refer to the appropriate sheet of the Excel file (Questionnaire\_draft DATE)

---

**Section C – End of the interview**

---

If time permits, ask the interviewed if there is anything else, he/she would like to share.

It is also a good idea to ask if you can contact the interviewee later in case you have additional questions.

Should participants wish to know more about the Next Tourism Generation Alliance project, they can visit <https://hypro4st-project.eu/>. Please ask them if they are interested in collaborating on other phases of the project.



## Desk Research Guidelines

---

### Introduction

---

According to the project, the initial phases of the project include a quantitative analysis, a qualitative analysis and a desk research.

Desk research -as well as for focus groups and interviews- deals mainly, but not exclusively, with the qualitative aspects of the needs analysis, while the quantitative dimension is explored through the data emerging from the questionnaires.

In our case, the research is an exploratory investigation, that is a study conducted when not much is known about a particular phenomenon. In exploratory research, one typically seeks to identify multiple possible links between variables (source: APA Dictionary of Psychology).

Desk research (often called "secondary research" or "secondary data analysis") usually uses secondary data, i.e. information previously collected and analyzed for other purposes.

Secondary data can originate from external sources (scientific articles, reports, publications of research institutions, etc.) or from internal sources, as in the case of the information which, in our project, will be acquired through the questionnaire and the focus groups.

The qualitative-quantitative analysis of the data will lead to a proposal of an exploratory nature based on inductive reasoning. Inductive reasoning is the process of developing conclusions from collected data by weaving them together with new information and transforming them into theories. (see the questionnaire construction process).

This document should be used as an outline for developing research. The skills of each partner make it possible to improve it, make it more efficient. So any additional contribution will be very helpful.

---

### Objectives

---

Desk research is a need analysis tool. The purpose of its use is to obtain information in order to determine the tourism sector's labour market needs.

The research must therefore be aimed at studying the new and changing needs of skills in the workplace market. For this, it requires data collection and analysis at various levels: macroeconomic, regional, local, sectoral, occupational and business level.

Research findings will then have to be transferred into policy and practice; consequently it is important to identify examples of good practice which will enable partners to learn from each other and address each other's challenges in the best possible way.

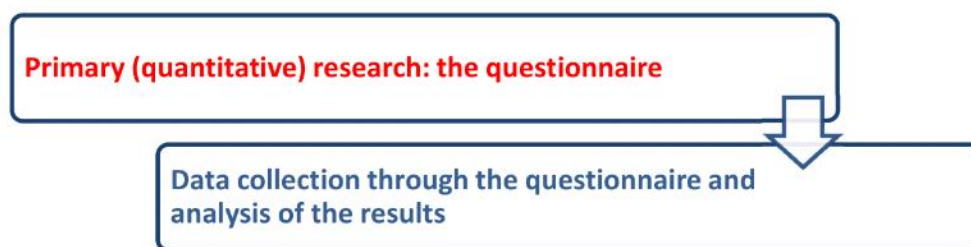


**Contents and structure (templates)**

**TAB. 1**

	Sample description (to be filled)	Survey results (to be filled)	
Analysis of data collected through questionnaires	Synthetic general data: sample composition, profile of the interviewees, tools used for the distribution of the questionnaires, number of questionnaires administered and completed.	The description of the results can be made using a total of no more than 1000 words. It is important to highlight the central themes for each section, possibly using no more than three keywords per section. Some hypotheses can be formulated.	
		About the value of sustainability in tourism.	E.g. the importance that tourism companies and institutions give to sustainability, the possibilities of implementing sustainability policies.
		About the tourism labour market, skills and trainings in the tourism sector.	E.g. market needs, developing sectors, emerging profiles, skills in sustainability, digitization and soft skills
		About the Hybrid Project Management profile.	E.g. knowledge of the profile, applied skills, specialist training, placement possibilities.
		Final considerations.	Considerations on the professional needs of the tourism sector and on the opportunities for the technical profile identified by the project.

Quali-quantitative analysis can be completed with descriptive statistics.

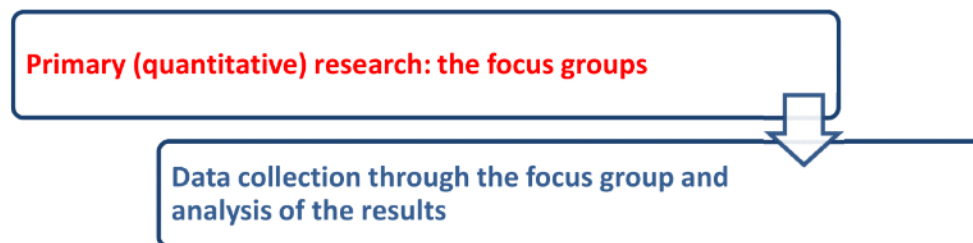


**Figure 32: Desk research guidelines – Page 2**

**TAB. 2**

Analysis of data collected through focus groups	Sample and method description (to be filled)	Survey results (to be filled)	
	Synthetic general data: sample composition, profile of the interviewees, considerations about the homogeneity or heterogeneity of the group, method of conducting the focus group (e.g. semi structured, with interview guide), etc.	The description of the results can be made using a total of no more than 1000 words. It is important to highlight the central themes for each section, possibly using no more than three keywords per section. Some hypotheses can be formulated.	
		About the value of sustainability in tourism.	E.g. the importance that tourism companies give to sustainability, the possibilities of implementing sustainability policies.
		About the tourism labour market, skills and trainings in the tourism sector.	E.g. market needs, developing sectors, emerging profiles, skills in sustainability, digitization and soft skills
		About the Hybrid Project Management profile.	E.g. knowledge of the profile, applied skills, specialist training, placement possibilities.
		Final considerations.	Considerations on the professional needs of the tourism sector and on the opportunities for the technical profile identified by the project.

Quali-quantitative analysis can be completed with descriptive statistics.



**Figure 33: Desk research guidelines – Page 3**

**TAB. 3**

	Type of source	Territorial scale	Type of document
Analysis of indirect sources	Governative/institutional bodies	<ul style="list-style-type: none"> <li>• supranational</li> <li>• national</li> <li>• regional</li> <li>• local</li> </ul>	Development plans, official statistics, technical reports, etc.
	Professional and academic institutions		Journals/articles, reference books, public and private research organizations, public and private universities, public and private libraries, computerized databases, etc.
	NGOs		Project reports, baseline studies, project evaluations, technical reports, etc.
	Research institutions		Reports, working papers, economic/social data, statistics, etc.
	Internet websites		Presentation of studies and reports, online databases, etc.
	Other		

References should be cited using the APA style citation method 7th ed. (documents will be listed at the end of the report in the "References" section).



Figure 34: Desk research guidelines – Page 4



## Content analysis

The content analysis takes into account the available texts, sources and their reliability. In fact,

content analysis is a research technique for making replicable and valid inferences from texts (or other meaningful matter) to the contexts of their use. [...] As a research technique, content analysis provides new insights, increases a researcher's understanding of particular phenomena, or informs practical actions (Krippendorff, 2004, p. 18).

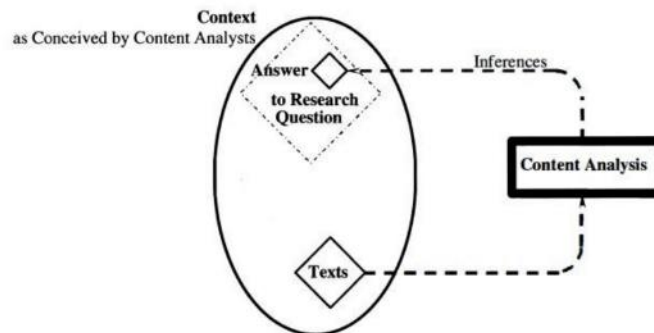


Fig. 1 - Content Analysis: Answering Questions Concerning a Context of Texts  
Source: Krippendorff, 2004, p. 82

One of the main desk analysis activities is therefore represented by the consultation and analysis of texts deemed useful for achieving the objectives (obtaining information in order to determine the needs of the labor market in the tourism sector). Consequently, for this purposes, documents from scientific and/or reliable sources may be used.

For the analysis of the texts, it is suggested to follow the scheme prepared for the questionnaire, where the following steps were followed (see 'Methodological introductions'):

- some **key trends** (excerpts from the documents) have been summarized in one section [column];
- in the next section [column], the **actions to take** (excerpts from the documents) that the authors consider particularly effective for adapting to trends have been highlighted;
- a third section [column] indicates the **emerging themes** considered crucial for defining the design of the questionnaire and for conducting the interviews and focus groups.

A fourth containing **final considerations** of the researcher can be added to the three previous sections.

The choice to condense the information drawn from the sources into 'topic areas of analysis' can facilitate the conduct of desk research:

[...] extended meaning units must be condensed. This entails that the number of words is reduced without losing content of the unit [...]. The depth of the meaning units determines the level at which the analysis can be performed. This process of condensation is often needed when data are based on interviews and when latent content analysis [an interpretive level in which the researcher seeks to find the underlying meaning of the text] is to be carried out (Bengtsson, 2016, p. 10).

**TAB 4**

Topic Areas of Analysis (to be filled)					
	Source	Key trends	Actions to take	Emerging themes	Final considerations
Document A	- About the value of sustainability in tourism				
	- About the tourism labour market, skills and trainings in the tourism sector				
	- About the Hybrid Project Management profile				
Document N	- About the value of sustainability				
	- About the tourism labour market, skills and trainings in the tourism sector.				
	- About the Hybrid Project Management profile				

Text length within each topic area of analysis should not exceed 200 words.

**Figure 36: Desk research guidelines – Page 6**

The four topics (key trends, actions to take, emerging themes and final considerations) should be cross-referenced with the three macro-topics, that we consider 'reading keys' because, in our opinion, they allow a critical reading of the current trends: 2) the value of sustainability in tourism, 3) the tourism labour market, skills and trainings in the tourism sector, 4) the Hybrid Project Manager profile (see. 'Methodological Introduction' and questionnaire).

The compilation of table 4 (template) must be carried out taking into account table 3, which specifically concerns the consultation and analysis of documents. Table 4, in fact, will report in the column named 'source' the titles of the documents cited in table 3.

The previous one is a scheme for synthesizing the research material and to bring out homogeneous and comparable topics. Researchers can enrich the material with additional elements as in a "palimpsest": but it is essential that the basic structure is the same for each partner. A more detailed commentary may be added to the templates, the length of which should not exceed 1000 words.

We report below some in-depth arguments as an outline and the respective links to the websites.

- Within the heading 'About the value of sustainability in tourism' the following topics could be analysed:

---

#### **The tourism industry and destinations approach to sustainability**

---

Some sources as an example:

<https://etc->

[corporate.org/uploads/2021/09/ETC\\_SUSTAINABLE\\_TOURISM\\_HANDBOOK\\_vs6\\_FINAL.pdf](https://corporate.org/uploads/2021/09/ETC_SUSTAINABLE_TOURISM_HANDBOOK_vs6_FINAL.pdf)

<https://www.e-unwto.org/doi/pdf/10.18111/9789284415496>

[https://wtcc.org/Portals/0/Documents/Reports/2022/WTTcXICF-Enhancing\\_Resilience-Sustainable\\_Destinations.pdf?ver=2022-06-13-213556-557](https://wtcc.org/Portals/0/Documents/Reports/2022/WTTcXICF-Enhancing_Resilience-Sustainable_Destinations.pdf?ver=2022-06-13-213556-557)

---

#### **New sustainable models of tourism consumption**

---

Some sources as an example:

<https://webunwto.s3.eu-west-1.amazonaws.com/s3fs-public/2020-09/Experiences-from-pilot-studies-in-Measuring-the-Sustainability-of-Tourism.pdf>

<https://forumnatura.org/wp-content/uploads/2021/07/SustainableTravelIndex-v0.3.pdf>

<https://www.tandfonline.com/doi/full/10.1080/15022250.2021.1984986>

- Within the heading 'About the tourism labour market, skills and trainings in the tourism sector' the following topics could be analysed:

---

#### **Existing and Future Strategies and their impact on education and vet systems**

---

[https://cor.europa.eu/en/engage/studies/Documents/Service%20sector%20re-orientation-](https://cor.europa.eu/en/engage/studies/Documents/Service%20sector%20re-orientation-%20transferring%20skills%20from%20the%20tourism%20sector/CoR_Skills-tourism_study-N.pdf)

[%20transferring%20skills%20from%20the%20tourism%20sector/CoR\\_Skills-tourism\\_study-N.pdf](https://cor.europa.eu/en/engage/studies/Documents/Service%20sector%20re-orientation-%20transferring%20skills%20from%20the%20tourism%20sector/CoR_Skills-tourism_study-N.pdf)

[https://www.eca.europa.eu/lists/ecadocuments/sr21\\_27/sr\\_eu-invest-tourism\\_en.pdf](https://www.eca.europa.eu/lists/ecadocuments/sr21_27/sr_eu-invest-tourism_en.pdf)



- For the 'Hybrid Project Manager profile' item, please refer to the existing scientific literature on Project Management

These are research ideas that can be implemented by the modules to be included in the curriculum proposed on page. 66 of the Application Form.

- The desk research can be contextualized by taking into consideration the tourism macro-environment, its evolution and future developments. In this case the following topics could be analysed:

---

#### **Technology trends in the travel industry and their impact on the development of Human Resources**

---

Some sources as an example:

<https://www.techtarget.com/whatis/feature/6-technology-trends-in-the-travel-industry>  
[https://link.springer.com/chapter/10.1007/978-3-030-65785-7\\_34](https://link.springer.com/chapter/10.1007/978-3-030-65785-7_34)  
<https://webunwto.s3.eu-west-1.amazonaws.com/s3fs-public/2021-06/travel-and-tourism-tech-startup-ecosystem-and-investment-landscape.pdf>  
<https://documents1.worldbank.org/curated/en/724941581621885483/pdf/Digital-Platforms-and-the-Demand-for-International-Tourism-Services.pdf>  
<https://www.intelligentcitieschallenge.eu/sites/default/files/2019-09/EA-04-19-483-EN-N.pdf>

---

#### **Destination Management methodologies**

---

Some sources as an example:

<https://www.unwto.org/global/publication/practical-guide-tourism-destination-management>  
<https://op.europa.eu/it/publication-detail/-/publication/4b90d965-eff8-11e5-8529-01aa75ed71a1/language-en>  
[https://smarttourismdestinations.eu/wp-content/uploads/2022/07/Smart-Tourism-Destinations\\_EU-guide\\_v1\\_EN.pdf](https://smarttourismdestinations.eu/wp-content/uploads/2022/07/Smart-Tourism-Destinations_EU-guide_v1_EN.pdf)

---

#### **Opportunities and Obstacles in the Global Tourism Industry**

---

Some sources as an example:

<https://www.unwto.org/tourism-in-2030-agenda>  
<https://documents1.worldbank.org/curated/en/558121506324624240/pdf/119954-WP-PUBLIC-SustainableTourismDevelopment.pdf>

[https://go.euromonitor.com/white-paper-EC-2023-Top-10-Global-Consumer-Trends-EN.html?utm\\_source=whitepaper&utm\\_medium=website&utm\\_campaign=CT\\_23\\_01\\_17\\_WP\\_To\\_p\\_10\\_GCT\\_2023\\_EN&utm\\_content=GCT23](https://go.euromonitor.com/white-paper-EC-2023-Top-10-Global-Consumer-Trends-EN.html?utm_source=whitepaper&utm_medium=website&utm_campaign=CT_23_01_17_WP_To_p_10_GCT_2023_EN&utm_content=GCT23)

---

## Best practices

---

Table 4 can also be used to cite best practices that, which, as indicated by the project, will be approximately 10, for the development of innovative hybrid project management, sustainable/green, ICT, creative, design thinking and soft skills acquisition, assessment tools and best training practices in vocational and adult training. To harmonize the contributions, each partner country will be able to cite 2 to 4 examples.

---

## What should emerge from desk research

---

- The needs of the tourism market regarding skills similar to the Hybrid Project Manager (HPM)
- The awareness, by the tourism market, of the HPM profile
- The professional requirements that would be appreciated by the tourist market with regard to the HPM
- The existence of specialist training courses dedicated to this managerial profile
- Placement opportunities
- From 2 to 4 best practices

As a survey tool, the questions proposed for the focus groups can be used.  
(see also 2023.03.14\_WP2\_T2.2\_Questionnaire\_focus groups\_interviews\_final)

---

## References

---

- Bengtsson, M. (2016), How to plan and perform a qualitative study using content analysis, *NursingPlus Open*, 8-14
- Krippendorff, K. (2004), *Content Analysis. An Introduction to Its Methodology*. Thousand Oaks, London, New Dehli: SAGE Publications





## WP2 Labour Market Needs Analysis and Development of a New Job Profile Certification

### T2.2. Identification of Labour Market Needs Proposed Report Template – National Report



Figure 40: National Report Template - Page 1

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**Figure 41: National Report Template - Page 2**

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    4.3 Secondary (qualitative) research: The Desk Research .....5

5. Conclusions and Recommendations .....5

6. References .....5



**Figure 42: National Report Template - Page 3**





## **1. Executive Summary**

This summary should be prepared at the end, after the report has been completed, and it should provide an overall description of the purpose and objectives of the report, a brief overview of the data collection methods, and a brief presentation of the main findings.

**Length: 100-200 words**

## **2. Introduction**

In this section, a general introduction to the report needs to be given, outlining the main scope of the project and the general objectives that the report addresses.

**Length: 100-200 words**

## **3. Methodology**

It is suggested to also follow the indications contained in the Desk Research Guidelines.

## **4. Results and Discussion**

### **4.1 Primary (quantitative) research: The Questionnaire**

This section should include:

- Some technical information regarding the survey: sample composition, profile of the interviewees, tools used for the distribution of the questionnaires, number of questionnaires administered and complete.
- The results of the survey, possibly broken down into two subsections: one, more general, concerning the tourism macro-environment (sustainability, skills, training in the tourism systems), and another focused on the questions concerning the profile of the Hybrid Project Management.

### **4.2 Primary (qualitative) research: The Focus Group / The Interviews**

This section should include:

- Some technical information regarding the focus group: profile of the interviewees, considerations about the homogeneity or heterogeneity of the group, method of conducting the focus group (e.g. semi structured, with interview guide), etc.

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WP2/T2.2 – Proposed Report Template – National Report

- The results of the survey, possibly broken down into two subsections: one, more general, concerning the tourism macro-environment (sustainability, skills, training in the tourism systems), and another focused on the questions concerning the profile of the Hybrid Project Management.

**Length: 300-400 words and descriptive statistics (the use of keywords is recommended).**

### **4.3 Secondary (qualitative) research: The Desk Research**

This section should include:

- Some technical information regarding the desktop research: type of source, territorial scale, type of document, etc.
- The results of the desk research: for the contents of this sub-section, please refer to Desk Research Guidelines.
- 2 to 4 best practices, paying attention to: describe the case study, analyze the main aspects that connect it to the topic of interest, illustrate the conclusions.

References should be cited using the APA style citation method 7<sup>th</sup> ed. (documents will be listed at the end of the report in the "References" section).

**Length: 1500-2000 words (the use of keywords is recommended).**

## **5. Conclusions and Recommendations**

This section contains the overall interpretation of the results. It is a matter of giving a general look at the results of the qualitative-quantitative survey and drawing some conclusive evidence.

Technical-scientific recommendations should also be included in the section, i.e. the actions that it is suggested to develop taking into account the aims envisaged by the project.

**Length: 1000 words**

## **6. References**

Please mention your references and bibliography used for the Report using APA Style.

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**Figure 44: National Report Template - Page 5**

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## Anexo B. Inquérito online

### Annex B. Online Survey

6/11/23, 1:20 PM

HyPro4ST - Labour Market Needs Questionnaire

#### HyPro4ST - Labour Market Needs Questionnaire

This survey is launched as the first consultation activity of the project "**Sustainable Tourism Innovation Through Hybrid Project Management (HyPro4ST)**", a three-year project co-funded by the European Union under the Erasmus+ Programme, KA2: Cooperation Among Organizations and Institutions: Alliances for Innovation.

The project aims to develop a new job "**Sustainable and Hybrid Project Manager**" profile for the Sustainable Tourism Sector and upskill professionals in sustainable, hybrid, digital, creative and entrepreneurship project management. The answers to this survey will help us determine the profile of the new Manager and make his/her placement on the labour market more effective.

The survey takes **about 10 minutes**. Responses will be treated **anonymously** and the results will be used for **research purposes only**.

\* Indicates required question

1. Please indicate the sector in which you work: \*

Mark only one oval.

- Private sector (including trade associations)
- Public sector
- NGO/ Not-for-profit organization
- Educational
- Other: \_\_\_\_\_

2. Which of the following describes best your current job/role? \*

Mark only one oval.

- Project manager
- Travel agency manager
- Destination manager
- Tour organiser
- Travel consultant
- Tour operator
- Entrepreneur
- Corporate Social Responsibility Manager
- Office Administrator/Support
- Professional in the Accommodation/Hospitality Industry
- Professional in the Creative and Entertainment Activities
- Professional in the Transportation Industry
- Professional in the Food & Beverage Industry (serving tourism)
- Professional in the Business Support Services (accountant, marketer, business consultant etc.)
- Student
- Adult Trainer
- Vocational Education and Training Provider
- Higher Education Professor
- Other: \_\_\_\_\_

<https://docs.google.com/forms/d/1rW6e8JvDTte2uMTU61nSNincFUXMDjWOHgBG4S8lo0s/edit>

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**Figure 45: Labour Market Needs Online Questionnaire - Page 1**



6/11/23, 1:20 PM

HyPro4ST - Labour Market Needs Questionnaire

3. Age group: \*

Mark only one oval.

- 18 - 24
- 25 - 34
- 35 - 49
- 50 - 64
- 65 - 74
- 75+

4. Gender: \*

Mark only one oval.

- Female
- Male
- Transmale
- Transfemale
- Nonconforming
- Decline to answer
- Other: \_\_\_\_\_

**Sustainability, Skills and Training in the Tourism Systems**

5. 1. What concrete actions should your organization implement to make tourism practices more sustainable? \*

Please choose up to 3 answers (max).

Check all that apply.

- Biodiversity conservation actions (e.g. better management of scarce natural resources)
- Actions to tackle/mitigate climate change (e.g. improve the energy efficiency)
- Actions to develop the circular economy (e.g. prioritize sustainable food approaches for circularity)
- Actions to improve governance and finance (e.g. steer recovery funds towards tourism)
- Actions to improve people's well-being and health (e.g. connect hygiene with sustainability)
- Actions to promote social inclusion (e.g. support and involve vulnerable groups)
- Other: \_\_\_\_\_

6. 2. What do you think are the reasons why your organization address or could address sustainability issues? \*

Please choose up to 3 answers (max).

Check all that apply.

- Align with our goals, mission and values
- Meets consumer/customer expectations
- Attract, motivate and retain employees
- Develop new growth opportunities
- Response to competitive pressure
- Improve operational efficiency
- Build, maintain or improve corporate reputation
- Comply with regulatory requirements
- Other: \_\_\_\_\_

<https://docs.google.com/forms/d/1rW6e8JvDTte2uMTU61nSNincFUXMDjWOHgBG4S8lo0s/edit>

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**Figure 46: Labour Market Needs Online Questionnaire - Page 2**

6/11/23, 1:20 PM

HyPro4ST - Labour Market Needs Questionnaire

7. 3. Which of the following social sustainability actions should be considered a priority? \*

Multiple answers are allowed.

Check all that apply.

- Promotion of youth employment, particularly for young women
- Measures that facilitate the transition of workers from the informal to the formal economy
- Inclusion of workers with disabilities in the tourism labour force
- Integration of migrants in the tourism labour force
- Promotion of a general environment of zero tolerance of violence and harassment, including gender-based violence
- Ensure safety in the workplace
- Ensure maternity protection
- Other: \_\_\_\_\_

8. 4. Which of the following actions/measures should be implemented to revitalize the tourism sector? \*

Multiple answers are allowed.

Check all that apply.

- Green transition
- Safeguard of the health of residents and visitors
- Digital transition and smart technologies (e.g. open data)
- Skills, education and training
- Public administration and governance
- Competitiveness
- Financial sector and access to finance
- Involvement of local communities
- Other: \_\_\_\_\_

9. 5. Which of the following skills and abilities are the most important for people who want to work in the tourism sector? \*

Multiple answers are allowed.

Check all that apply.

- Focus on the client
- Technological and digital capabilities
- Creativity and innovation
- Flexibility and adaptability
- Ability to work in a team
- Commitment to work
- Other: \_\_\_\_\_

10. 6. Which of the following environmental skills should be implemented to improve the competitiveness of tourism systems? \*

Multiple answers are allowed.

Check all that apply.

- Promotion of environmentally friendly activities and products
- Promotion of sustainable forms of transport (e.g. public transport)
- Knowledge of climate change
- Ability to minimize use and maximize energy and water efficiency consumption
- Ability to manage waste, waste water, recycling and composting
- Conservation of biodiversity
- Other: \_\_\_\_\_

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**Figure 47: Labour Market Needs Online Questionnaire - Page 3**



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HyPro4ST - Labour Market Needs Questionnaire

11. 7. Which of the following digital skills should be implemented to improve the competitiveness of tourism systems? \*

Multiple answers are allowed.

Check all that apply.

- Operating system usage and computer programming skills
- Skills for implementing online safety procedures
- Online marketing and communication skills
- Desktop publishing skills (for designing brochures, catalogues, etc.)
- Website development skills
- Social media skills
- Data analytics, business intelligence, big data skills
- Artificial intelligence and robotics skills
- Other: \_\_\_\_\_

12. 8. In which of the following areas of entrepreneurship would you like to improve your skills? \*

Multiple answers are allowed.

Check all that apply.

- Creativity and innovation
- Design thinking methodology for developing customer-centred products/services/experiences
- Business strategy development
- Business model development
- Branding strategy development
- Marketing strategy development
- Corporate social responsibility
- Other: \_\_\_\_\_

13. 9. Which of the following soft skills do you think you need to improve? \*

Multiple answers are allowed.

Check all that apply.

- Critical thinking
- Exploratory thinking
- Change management
- Flexibility/Adaptability
- Emotional intelligence
- Leadership
- Communication
- Idea pitching (the art of presenting)
- Collaboration
- Networking
- Learning how to learn
- Promoting Diversity, Equity and Inclusion (DEI) in the workplace
- Customer service
- Other: \_\_\_\_\_

**Figure 48: Labour Market Needs Online Questionnaire - Page 4**



6/11/23, 1:20 PM

HyPro4ST - Labour Market Needs Questionnaire

14. 10. What is the most effective form for training a tourism professional? \*

Mark only one oval.

- Through face-to-face training
- Through online training
- Through tutors at work
- Learning-by-doing
- Other: \_\_\_\_\_

#### The Hybrid Project Management Profile

15. 11. Which of the following practices do you use to perform your daily tasks? \*

Multiple answers are allowed.

Check all that apply.

- Project management platforms (e.g. MS Project, Basecamp, Jira etc)
- Specific project management templates (e.g. project charter, stakeholders register, status report, meeting agenda/minutes etc.)
- Key performance indicators for measuring quality, impact and success
- I do not implement any of these practices
- Other: \_\_\_\_\_

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**Figure 49: Labour Market Needs Online Questionnaire - Page 5**



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HyPro4ST - Labour Market Needs Questionnaire

16. 12. Please indicate the extent to which you use the following processes to implement your projects and/or perform your daily tasks. \*

Mark only one oval per row.

	Not at all	To some extent	Greatly	I don't know / I am not familiar with these terms
Project Integration Management (coordinating all elements of a project, including tasks, resources, stakeholders and deliverables)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Project Scope Management (defines and outlines all of the work that is included within a project, including objectives, tasks, outputs and deadlines)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Project Time Management (processes required for the on-time completion of the project)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Project Cost Management (processes involved in planning, estimating, budgeting and controlling costs)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Project Risk Management (the process of identifying, analyzing and responding to any risks that arise)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Project Quality Management (the process of continually measuring the quality of all activities and	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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Figure 50: Labour Market Needs Online Questionnaire - Page 6





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HyPro4ST - Labour Market Needs Questionnaire

taking corrective actions to achieve the desired quality)

---

Project Procurement Management (processes required to purchase or acquire the products, services or results needed from outside the project team)

---

Project Human Resource Management (includes the organization and management of the project team – assigning roles and responsibilities)

---

Project Communications Management (processes required to ensure timely and appropriate generation, collection, distribution, storage, retrieval and ultimate disposal of project information)

---

<https://docs.google.com/forms/d/1rW6e8JvDTte2uMTU61nSNincFUXMDjWOHgBG4S8lo0s/edit>

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**Figure 51: Labour Market Needs Online Questionnaire - Page 7**



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HyPro4ST - Labour Market Needs Questionnaire

17. 13. Do you think it is more beneficial for a tourism business to be flexible, manage change and follow the market than \*  
to apply medium-long term planning?

1 = Strongly Agree, 2 = Agree, 3 = I don't know, 4 = Disagree, 5 = Strongly Disagree

Mark only one oval.

Strongly Agree

1

2

3

4

5

Strongly Disagree

18. 14. In your organization the approach to project management (i.e. the use of specific knowledge, skills, tools and techniques to deliver something of value to people) is: \*

Mark only one oval.

- Traditional, i.e. based on the breakdown of project activities into linear sequential phases ('waterfall' approach)
- Flexible and innovative, able to adapt quickly to change with versatile strategies and targeted interventions ('agile' approach)
- Primarily focused on user/customer satisfaction ('lean' approach)
- Holistic, i.e. combines some or all of the previous approaches ('hybrid' approach)
- I don't think my organization deals with project management
- I don't know / I am not familiar with these terms
- Other: \_\_\_\_\_

**Figure 52: Labour Market Needs Online Questionnaire - Page 8**



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HyPro4ST - Labour Market Needs Questionnaire

19. 15. Please indicate whether and to what extent your organization uses the following project management methodologies when implementing projects/day-to-day operations: \*

**Project management methodology:** principles, tools and techniques used to plan, execute and manage projects.

Mark only one oval per row.

	Not at all	To some extent	Greatly	I don't know / I am not familiar with these terms
Waterfall Methodology	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Agile Methodology	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Hybrid Methodology	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Green PM Methodology	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Scrum Methodology	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Project Management Body of Knowledge (PMBOK)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Critical Path Method (CPM)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Critical Chain Project Management (CCPM)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Kanban Methodology	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Extreme Programming (XP)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Lean Methodology	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Six Sigma	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Projects In Controlled Environment Version 2 (PRINCE2)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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Figure 53: Labour Market Needs Online Questionnaire - Page 9



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HyPro4ST - Labour Market Needs Questionnaire

20. 16. In your opinion, can a hybrid project manager, able to implement planning effectively but also to adapt quickly to changes, be considered a competitive resource for tourism businesses and public bodies responsible for tourism policies? \*

1 = Strongly Agree, 2 = Agree, 3 = I don't know, 4 = Disagree, 5 = Strongly Disagree

Mark only one oval.

Strongly Agree

1

2

3

4

5

Strongly Disagree

21. 17. Does your organisation include in its organizational chart an official job position entitled "Project Manager"? \*

Mark only one oval.

Yes

No

I don't know

22. 18. Please indicate you agree with the following statement: \*

"My project management skills are satisfactory."

1 = Strongly Agree, 2 = Agree, 3 = I don't know, 4 = Disagree, 5 = Strongly Disagree

Mark only one oval.

Strongly Agree

1

2

3

4

5

Strongly Disagree

Figure 54: Labour Market Needs Online Questionnaire - Page 10



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HyPro4ST - Labour Market Needs Questionnaire

23. 19. Do you have any certification in project management? \*

Mark only one oval.

Yes

No

24. 20. Would you be interested in attending a free training course entitled "Sustainable Hybrid Project Management for the Tourism Sector"? \*

Mark only one oval.

Yes

No

25. If yes, please specify why:

Mark only one oval.

It is free of charge

I have spare time

I want to improve my existing knowledge

I want to learn something new

Other: \_\_\_\_\_

#### Final Communication

Thank you for your collaboration!

Please also provide us with the information requested below. Your personal information will only be used for the purposes of the survey (to check the validity of the questionnaires) and the project. **They will not be published or used to track your responses under any circumstances.**

Your data will be treated in compliance with current privacy regulations.

26. Name

\_\_\_\_\_

27. Surname

\_\_\_\_\_

28. Organization

\_\_\_\_\_

29. Email \*

\_\_\_\_\_

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**Figure 55: Labour Market Needs Online Questionnaire - Page 11**



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HyPro4ST - Labour Market Needs Questionnaire

30. I wish to be informed about the progress of the project and I consent to the use of my personal data to receive informative emails about it. \*

*Mark only one oval.*

- Yes  
 No

31. I consent to have the information stated above used by the HyPro4ST project partners solely for meeting the purposes of this survey. \*

*If you wish to withdraw your consent, please send us a declaration email to [hypro4st@sustainable-city.gr](mailto:hypro4st@sustainable-city.gr).*

*Check all that apply.*

- Yes, I consent.

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**Figure 56: Labour Market Needs Online Questionnaire - Page 12**

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Erasmus Plus Programme, KA 2: Cooperation Among  
Organizations and Institutions: Alliances for Innovation  
101056300-HyPro4ST-ERASMUS-EDU-2021-PI-ALL-INNO

## **Anexo C. Relatório nacional da Croácia**

## **Annex C. National Report of Croatia**



### **WP2 Labour Market Needs Analysis and Development of a New Job Profile Certification**

#### **T2.2. Identification of Labour Market Needs – National Report of Croatia**



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## **1. Executive Summary**

This report presents the main conclusions of activity T2.2, i.e., the identification of labour market needs, for Croatia. It is based on primary and secondary data collected through desk research (including government/institutional bodies, professional and academic institutions, NGOs, research institutions, and other relevant internet sources), expert focus groups and online questionnaires (including various tourism and project management stakeholders). The main findings indicate that there is an urgent need for human resource development in the tourism industry due to a lack of certain competencies, especially soft skills and digital literacy. In addition, while several project management programs were identified, they do not focus on linking project management practices to sustainable tourism and hybrid project management. Therefore, it is important to train project managers to become multidisciplinary experts who are able to collaborate with various stakeholders in the development of sustainable tourism. Furthermore, the results suggest that there is a lack of quality digital/hybrid learning tools needed to improve the quality of the education system in Croatia.

## **2. Introduction**

Current project management is mostly concerned with the business and technical aspects of the tasks at hand, but not with sustainable tourism. To address this gap, the HyPro4ST project aims to achieve positive social and sustainable impacts on the tourism sector by developing a new job profile of sustainable and hybrid project manager for the sustainable tourism sector. Current project management professionals will thus be further trained to better respond to the needs of sustainable tourism. To achieve this goal, Work Package 2 will identify labour market needs for each partner country (T2.2). This report for Croatia includes the results of primary quantitative research (questionnaire, Section 3.1), primary qualitative research (focus group / interviews; Section 3.2), and secondary (qualitative) research (desk research; Section 3.3) conducted in April 2023. Based on the results of the qualitative and quantitative research, conclusions and recommendations for future work are provided.

## **3. Methodology**

The methodology followed was the one proposed by the consortium (as mentioned in the guidelines given).

## **4. Results and Discussion**

## 4.1 Primary (quantitative) research: The Questionnaire

### Sample description

The target population included tourism stakeholder from all 21 Croatian counties. Tourism stakeholders included tourist board representatives (23%), managers and entrepreneurs in the catering and accommodation sector (19%), and other tourism-related relevant stakeholders like tourism study students (9%), higher education professors (10%), and project managers (7%). Most of the responders were between 35 and 49 years of age (55%) and were employed in either the public (41%) or private sector (35%). There were predominantly more female responders (70%) compared to male responders. A minimum sample size of 50 responders per county was set; however, a total of 69 responses were obtained. The data was collected through an online questionnaire using the Google form option.

### Sustainability, skills, and training in the tourism systems

To achieve sustainability, responders believed that their organisation should implement action to develop the circular economy (62%), followed by implementation of actions that tackle/mitigate climate change (57%), and actions that aim at the conservation of biodiversity (55%) (Table 1). The reasons why they thought that their organization is suitable to address those sustainability issues were mostly related to the fact that they were aligned with their goals, mission and values (62%), however, they also believed that they were responsible for the development of the new growth opportunities (55%) and that they also met consumer/customer expectations (48%) (Table 2). The three most important social sustainability actions that should have been considered as a priority for their organisation were the promotion of youth employment, particularly for young women (59%), safety insurance in the workplace (58%) and promotion of a general environment of zero tolerance of violence and harassment, including gender-based violence (54%) (Table 3). To accomplish revitalization of the tourism sector, the responders believed that green transition (71%), and focus on skills, education and training (65%) as well as the involvement of local communities (65%) should be implemented (Table 4).

**Table 1: What concrete actions should your organization implement to make tourism practices more sustainable?**

Options	Frequency	Percentage
Biodiversity conservation actions (e.g. better management of scarce natural resources)	38	55%
Actions to tackle/mitigate climate change (e.g. improve the energy efficiency)	39	57%



Options	Frequency	Percentage
Actions to develop the circular economy (e.g. prioritize sustainable food approaches for circularity)	43	62%
Actions to improve governance and finance (e.g. steer recovery funds towards tourism)	27	39%
Actions that improve people's well-being and health (e.g. connect hygiene with sustainability)	20	29%
Actions to promote social inclusion (e.g. support and involve vulnerable groups)	18	26%
Other:	1	1%

*Table 2: What do you think are the reasons why your organization address or could address sustainability issues?*

Options	Frequency	Percentage
Align with our goals, mission and values	43	62%
Meets consumer/customer expectations	33	48%
Attract, motivate, and retain employees	17	25%
Develop new growth opportunities	38	55%
Response to competitive pressure	7	10%
Improve operational efficiency	14	20%
Build, maintain or improve corporate reputation	21	30%
Comply with regulatory requirements	12	17%
Other:	1	1%

*Table 3: Which of the following social sustainability actions should be considered a priority?*

Options	Frequency	Percentage
Promotion of youth employment, particularly for young women	41	59%
Measures that facilitate the transition of workers from the informal to the formal economy	21	30%
Inclusion of workers with disabilities in the tourism labour force	28	41%
Integration of migrants in the tourism labour force	14	20%
Promoting a general environment of zero tolerance of violence and harassment, including gender-based violence	37	54%



Options	Frequency	Percentage
Ensure safety in the workplace	40	58%
Ensure maternity protection	26	38%
Other:	1	1%

*Table 4: Which of the following actions/measures should be implemented to revitalize the tourism sector?*

Options	Frequency	Percentage
Green transition	49	71%
Safeguard of the health of residents and visitors	26	38%
Digital transition and smart technologies (e.g. open data)	34	49%
Skills, education, and training	45	65%
Public administration and governance	13	19%
Competitiveness	24	35%
Financial sector and access to finance	11	16%
Involvement of local communities	45	65%
Other:	2	3%

*Table 5: Which of the following skills and abilities are the most important for people who want to work in the tourism sector?*

Options	Frequency	Percentage
Focus on the client	46	67%
Technological and digital capabilities	30	43%
Creativity and innovation	50	72%
Flexibility and adaptability	56	81%
Ability to work in a team	39	57%
Commitment to work	34	49%
Other:	2	3%

Flexibility and adaptability (81%), creativity and innovation (72%) and focus on the client (67%) were determined as the most important skills and abilities for people working in the tourism



sector (Table 5). To improve the competitiveness of the tourism system three important environmental skills were detected, namely skills related to waste management (84%), energy and water management (72%) and promotion of environmentally friendly activities and products (70%) (Table 6). To improve the competitiveness of tourism systems through digitalisation, it was necessary to focus on online marketing and communication skills (88%), social media skills (64%) and data analytics, business intelligence and big data skills (52%) (Table 7).

**Table 6: Which of the following environmental skills should be implemented to improve the competitiveness of tourism systems?**

Options	Frequency	Percentage
Promotion of environmentally friendly activities and products	48	70%
Promotion of sustainable forms of transport (e.g. public transport)	41	59%
Knowledge of climate change	16	23%
Ability to minimize use and maximize energy and water efficiency consumption	50	72%
Ability to manage waste, wastewater, recycling and composting	58	84%
Conservation of biodiversity	39	57%
Other:	1	1%

**Table 7: Which of the following digital skills should be implemented to improve the competitiveness of tourism systems?**

Options	Frequency	Percentage
Operating system usage and computer programming skills	20	29%
Skills for implementing online safety procedures	24	35%
Online marketing and communication skills	61	88%
Desktop publishing skills (for designing brochures, catalogues, etc.)	17	25%
Website development skills	26	38%
Social media skills	44	64%
Data analytics, business intelligence, big data skills	36	52%
Artificial intelligence and robotics skills	11	16%

**Table 8: In which of the following areas of entrepreneurship would you like to improve your skills?**

Options	Frequency	Percentage
Creativity and innovation	34	49%
Design thinking methodology for developing customer-centred products/services/experiences	38	55%
Business strategy development	24	35%
Business model development	16	23%
Branding strategy development	34	49%
Marketing strategy development	41	59%
Corporate social responsibility	20	29%
Other:	1	1%

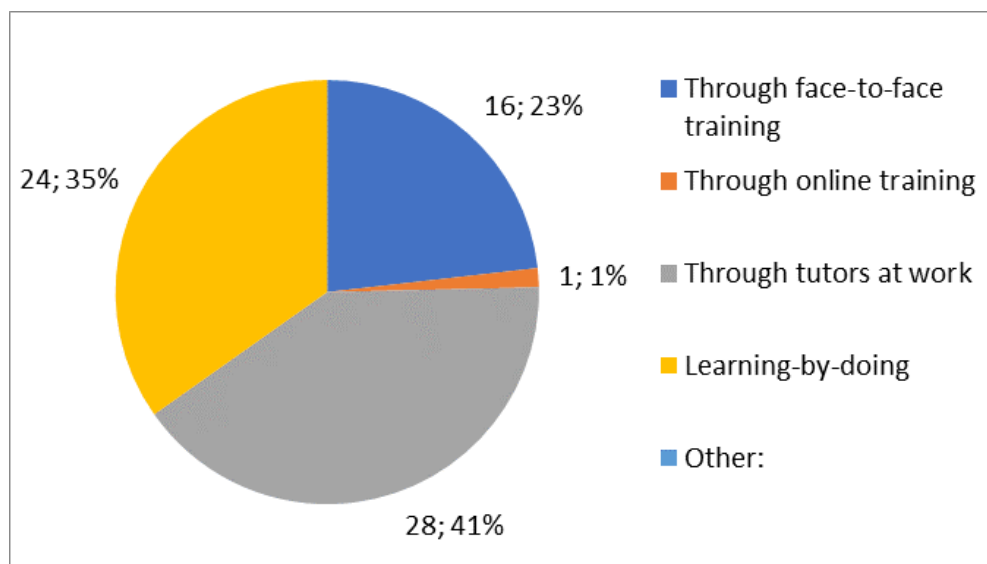
*Table 9: Which of the following soft skills do you think you need to improve?*

Options	Frequency	Percentage
Critical thinking	24	35%
Exploratory thinking	27	39%
Change management	31	45%
Flexibility/adaptability	16	23%
Emotional intelligence	30	43%
Leadership	20	29%
Communication	22	32%
Idea pitching (the art of presenting)	25	36%
Collaboration	13	19%
Networking	28	41%
Learning how to learn	10	14%
Promoting Diversity, Equity and Inclusion (DEI) in the workplace	16	23%
Customer service	4	6%

The responders were interested in improvement of four of their entrepreneurship areas, namely marketing strategy development (59%), design thinking methodology (55%), and branding strategy development (49%) and creativity and innovation skills (49%) (Table 8). Change management (45%), emotional intelligence (43%) and networking (41%) were deemed



as the most important soft skills that they need to improve (Table 9). However, they generally believed that the most effective form of training for a tourism professional was to learn through tutors at work (41%), followed by the learning they get from their own experience (35%) (Figure 1).



**Figure 1: What is the most effective form for training a tourism professional?**

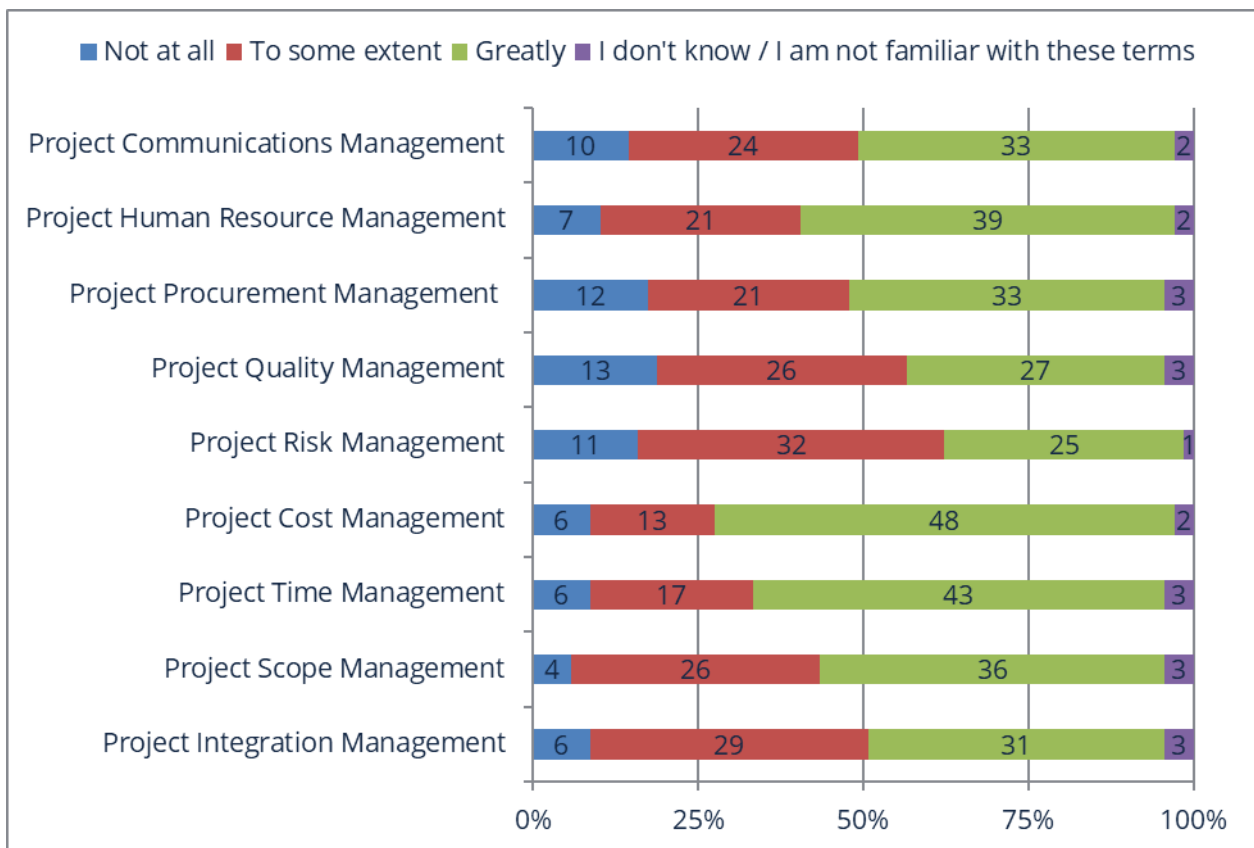
### The Hybrid Project Management profile

Responders generally did not use any special practices that would allow them to perform better in their daily tasks (45%), like project management platforms (Table 10). However, some of them followed key performance indicators for measuring quality, impact and success (39%) and used specific project management templates (32%).

**Table 10: Which of the following practices do you use to perform your daily tasks?**

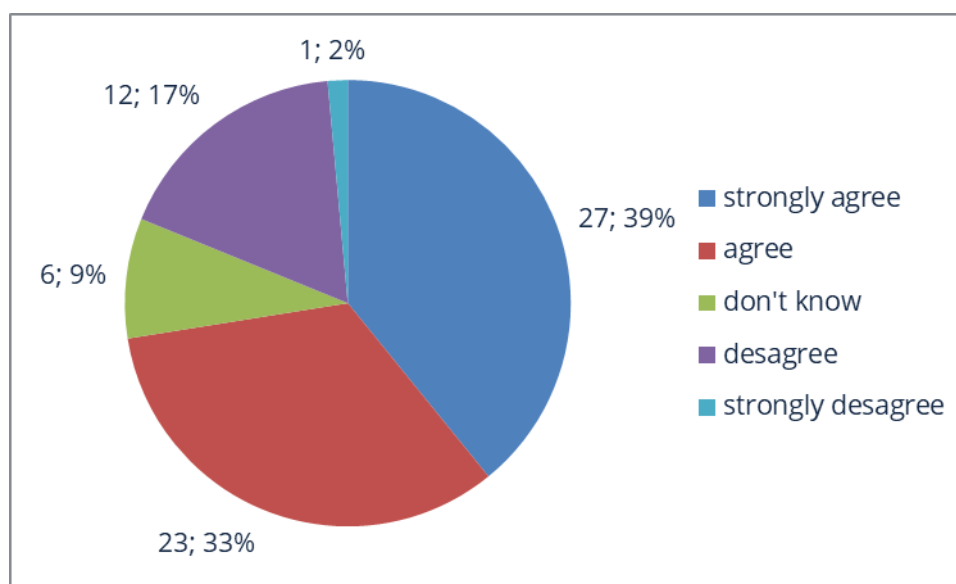
Options	Frequency	Percentage
Project management platforms (e.g. MS Project, Basecamp, Jira etc)	4	6%
Specific project management templates (e.g. project charter, stakeholders register, status report, meeting agenda/minutes etc.)	22	32%
Key performance indicators for measuring quality, impact and success	27	39%
I do not implement any of these practices	31	45%

The responders generally used various processes to implement their project and/or perform their daily tasks to great extend or at least to a certain level of extend (Figure 2). However, there were still those employees that did not use them at all or were not even familiar with those practices. Project quality management, project procurement management, project communication management and project risk management, seemed to be the most problematic areas. Nevertheless, most of the responders agreed, at least to a certain degree, that being flexible and to manage change and follow the market was more beneficial for a tourism business than applying medium to long term planning (Figure 3).



**Figure 2: Please indicate the extent to which you use the following processes to implement your projects and/or perform your daily tasks.**





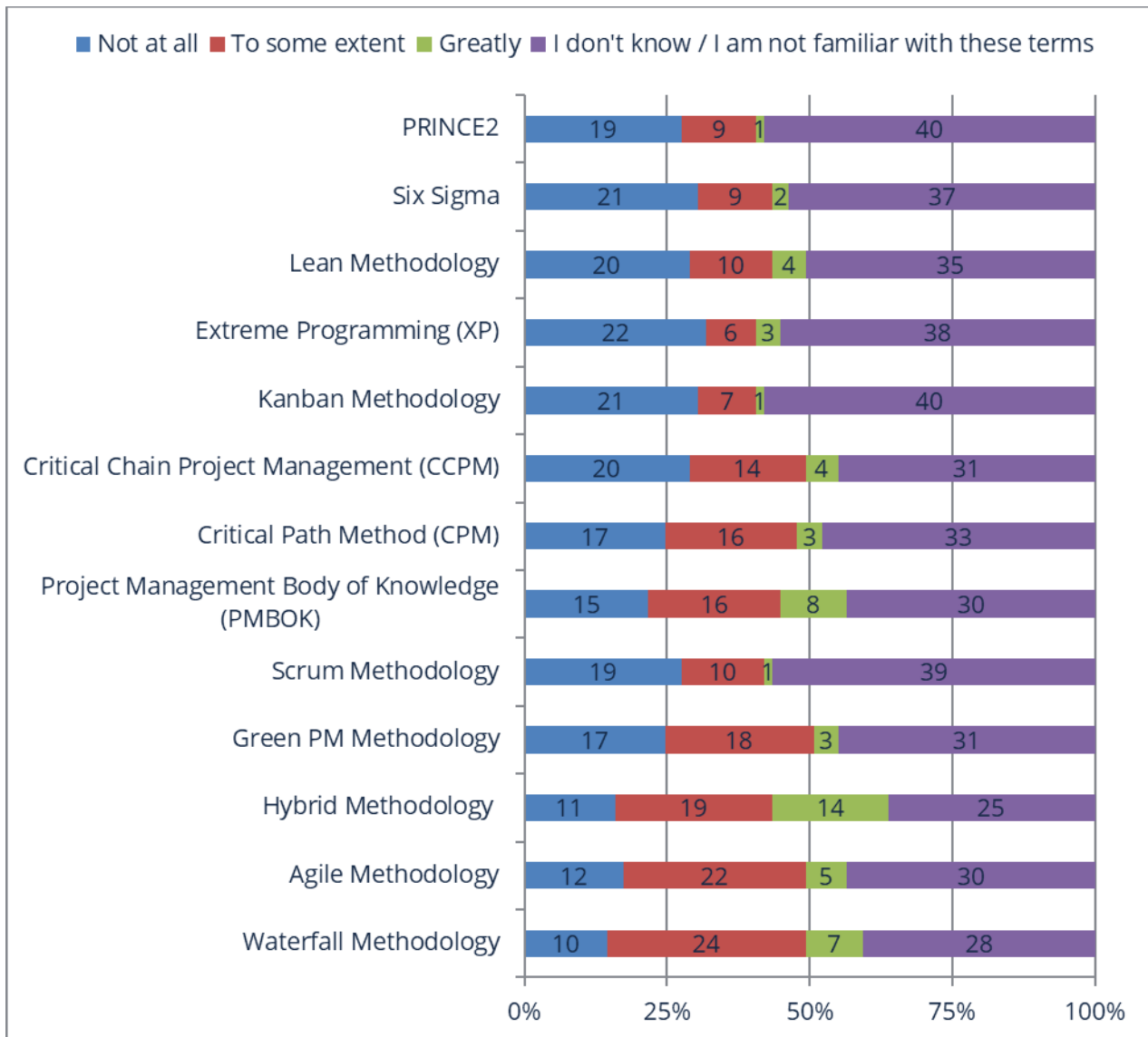
**Figure 3: Do you think it is more beneficial for a tourism business to be flexible, manage change and follow the market than to apply medium-long term planning?**

**Table 11: In your organization the approach to project management (i.e. the use of specific knowledge, skills, tools and techniques to deliver something of value to people) is:**

Options	Frequency	Percentage
Traditional, i.e. based on the breakdown of project activities into linear sequential phases ('waterfall' approach)	15	22%
Flexible and innovative, able to adapt quickly to change with versatile strategies and targeted interventions ('agile' approach)	13	19%
Primarily focused on user/customer satisfaction ('lean' approach)	11	16%
Holistic, i.e. combines some or all of the previous approaches ('hybrid' approach)	19	28%
I don't think my organization deals with project management	6	9%
I don't know / I am not familiar with these terms	5	7%

Organizations mostly tried to implement holistic approach to project management (28%), some used flexible and innovative approach (19%), however, traditional approach was still much present (22%) (Table 11). Regarding the management methodologies that organizations should use for the purpose of implementation of their projects and/or day-to-day operations, most of

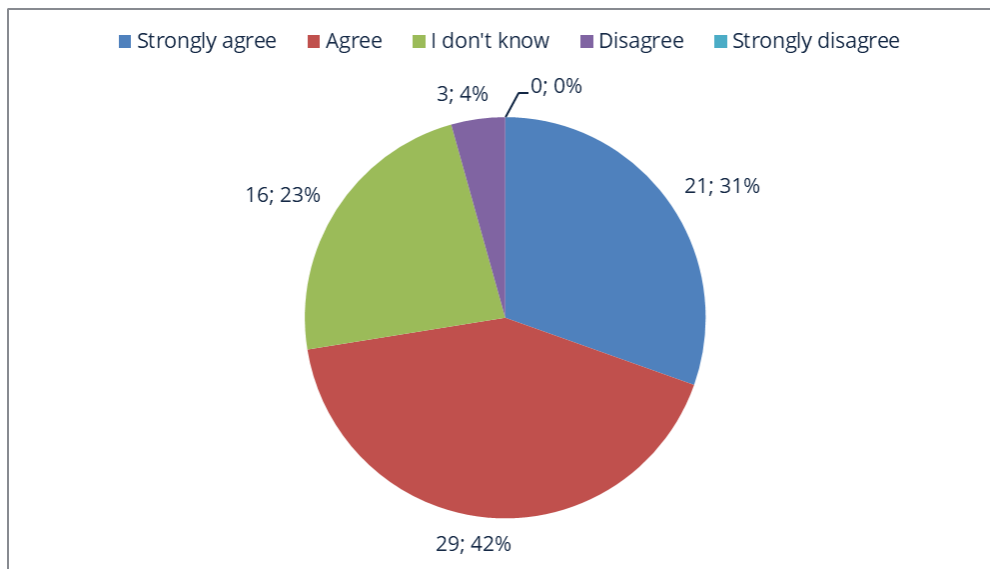
them did not use and kind of methodology or they were not even aware that those methodologies exist (Figure 4). Waterfall methodology and hybrid methodology were the two most commonly used methodologies followed by agile methodology, PMBOK and green PM methodology.



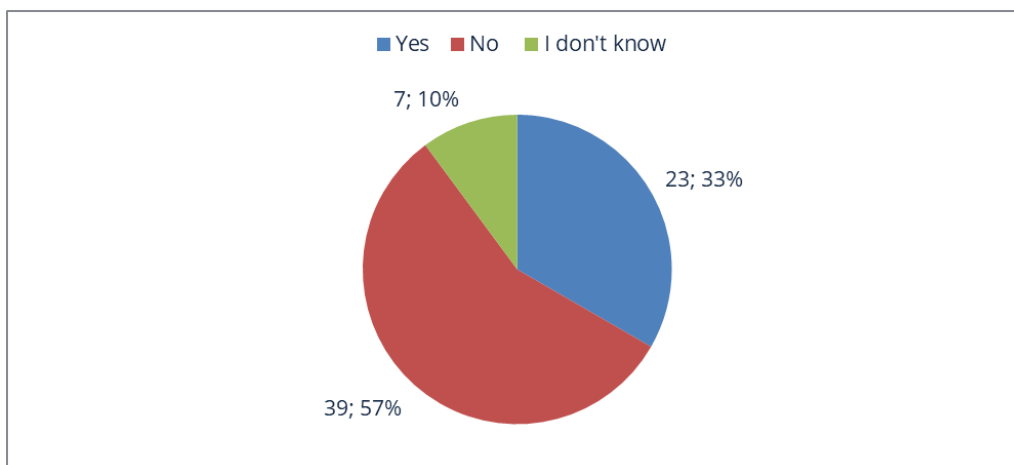
**Figure 4: Please indicate whether and to what extent your organization uses the following project management methodologies when implementing projects/day-to-day operations: Project management methodology: principles, tools and techniques used to plan, execute and manage projects."**

Most of the responders agreed, at least to a certain extent, that a hybrid project manager could be considered as a competitive resource for tourism business and public bodies responsible to

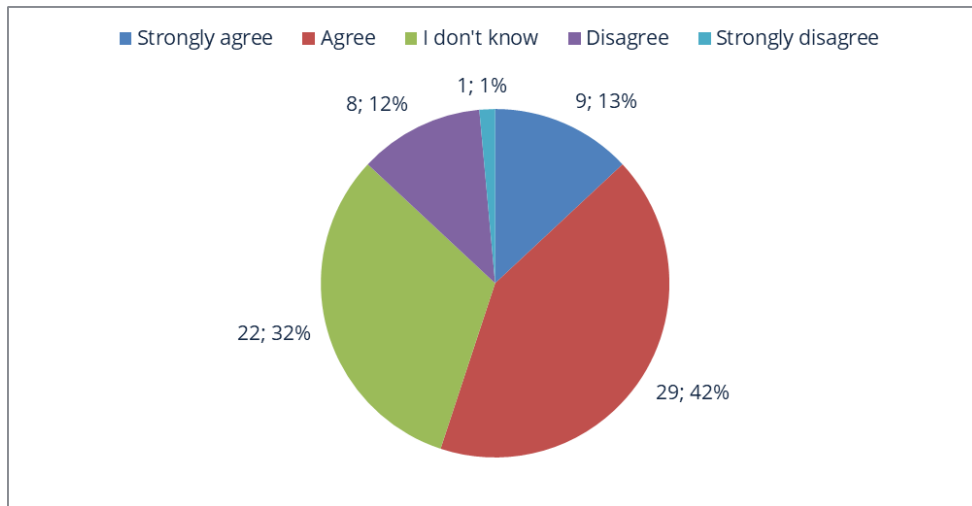
tourism policies (Figure 5). In spite of that, most of the organisations did not have project manager as an official job position in their organization (Figure 6), and still, most of them perceived their project management skill to be satisfactory (Figure 7), although only small percentage of them had obtained any kind of project management certification (Figure 8). On the other hand, most of the responders recognized the importance of life-long learning by expressing interest in participating in a free training course entitled “Sustainable Hybrid Project Management for the Tourism Sector (Figure 9 and Table 12).



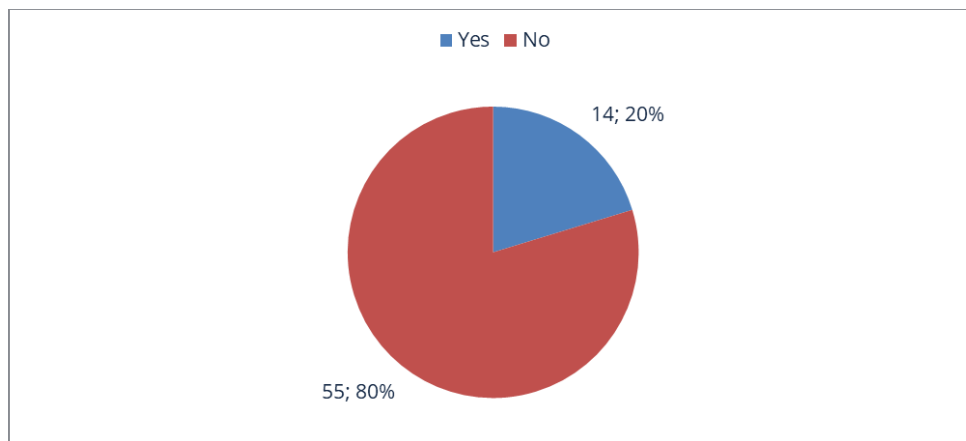
**Figure 5: In your opinion, can a hybrid project manager, able to implement planning effectively but also to adapt quickly to changes, be considered a competitive resource for tourism businesses and public bodies responsible for tourism policies?**



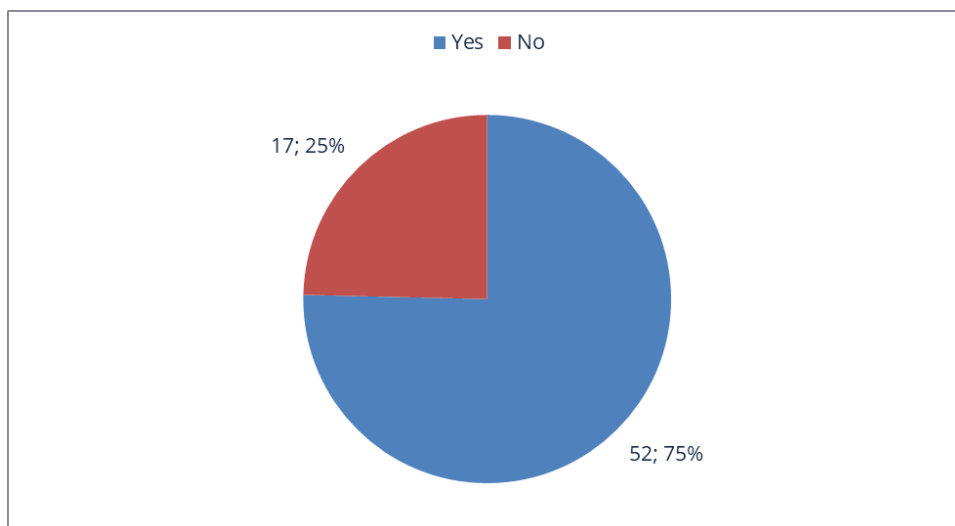
**Figure 6: Does your organisation include in its organizational chart an official job position entitled “Project Manager”?**



**Figure 7: Please indicate you agree with the following statement: "My project management skills are satisfactory."**



**Figure 8: Do you have any certification in project management?**



**Figure 9: Would you be interested in attending a free training course entitled "Sustainable Hybrid Project Management for the Tourism Sector"?**

**Table 12: If yes, please specify why:**

Options	Frequency	Percentage
It is free of charge	1	1%
I have spare time	0	0%
I want to improve my existing knowledge	35	51%
I want to learn something new	16	23%

## 4.2 Primary (qualitative) research: The Focus Group / The Interviews

### 4.2.1 Methods used for conducting qualitative research

The primary qualitative research of the attitudes and perceptions of key stakeholders was conducted on the focus group of 6 representatives of different sectors related to tourism, education and project management. Croatian project partners Institute of Agriculture and Tourism Faculty of Hospitality Management cooperated on the selection of the representatives of organizations covering identified key sectors relevant for this report (tourism/hospitality/education/project management) and obtaining their consent for the inclusion in project activities as focus group members. The composition of the focus group was following:

- Director of local tourist board of small coastal tourism destination
- Directors of tourist boards covering the specific inland areas close to the renown coastal tourism destinations (2)
- Principal of high school institution focused on educating for jobs in tourism, hospitality and catering services
- Director of private sector consultancy firm, specialized in the field of sustainable human resources management
- Representative of hospitality sector (reputation management coordinator at a hotel chain)
- Director of a nationally relevant private company oriented on consultancy and education in the field of project management

More details on the focus group members, including their names and positions can be found in other documents related to WP2. (T.2.1. Establishment of Local Stakeholders' groups). Chosen stakeholders' representatives are deliberately quite heterogeneous in order to cover attitudes and insights from various fields relevant for the project topic and results of WP2. Slight predominance of tourist boards representatives is visible, but their insights from the perspective of destination management organisations are highly relevant for better

understanding the complexity of sustainable tourism management and the necessity for hybrid project management in addressing local tourism development.

As appropriate mean of collecting relevant data and fostering open and inclusive discussion of all focus group members, onsite meeting was chosen and it was conducted on April 18, 2023, at the premises of Faculty of Tourism and Hospitality Management in Opatija. The focus group was organised as open discussion guided by questions for focus groups/interviews developed as a part of joint methodological framework for T.2.2. Discussion was moderated by the representatives of project teams of FTTHM and IPTPO. All chosen representatives attended the focus group meeting apart from one (from one of the chosen inland tourist boards) who could not come in person. The in-depth interview covering same questions and topics was conducted with him, afterwards. The focus group meeting was recorded, as well as the interview, in order to capture and save all data in its original form.

Concise analysis of responses, perceptions and attitudes of the focus group members is presented in the following section.

#### ***4.2.2 Results of the focus group discussion***

Obtained qualitative data was analysed, compared and coded into categories in order to better capture their sector-specific expertise and relevant insights on general topics of importance for this report: sustainability in tourism, tourism labour market, skills and trainings in the tourism sector and importance of hybrid project management.

##### Sustainability in tourism

In terms of new trends in tourism observed by the participants, they include following: combination of work and travel in terms of “workation” / “bleisure” / digital nomadism, sustainable and ecotourism, outdoor and nature tourism, focus on authentic experience, escape from stress and overcrowded areas into rural areas, focus on personal well-being and overall digitalisation.

All the participant of the focus group agreed that the biggest challenges in environmental issues surrounding sustainable tourism are energy and water consumption and waste management as interrelated topic very affected by increasing tourism demand. Sustainable tourism in general was recognised as an overall philosophy influencing every aspect of tourism activity while state of sustainable tourism in Croatia is in constant growth especially due to the improved legal framework, new strategic documents and constant awareness raising. Still, prevailing seasonality, pressure on infrastructure and degradation of landscape through construction building for the purpose of new accommodation facilities, makes sustainable tourism development very challenging but much needed concept for implementation, according to the opinions of all participants. Consequently, priority actions to be taken and

areas to be improved regarding sustainable tourism are oriented on the education of stakeholders, ecology, urban planning, renewable energy sources and general energy management, connection of agriculture and tourism and particularly more transparent and rigid process of generating building permissions for new tourism facilities. All of the participants outlined importance of maximisation of efficiency of water and energy consumption in combination with waste management as key environmental issues relevant for sustainable tourism. Focus group participants from private sector especially emphasised lack of systematic approach in addressing previously mentioned issues: implemented systems for energy, water and waste management significantly vary from destination to destination.

Components of social sustainability identified as particularly relevant for Croatian sustainable tourism situation, as seen by the participants include primary promotion of employment in tourism among young people: perception of work in tourism as hard, stressful and under-paid, contributed to the serious lack of interest for careers in tourism in Croatia. Additional challenge was detected in terms of many (especially young) people going abroad to work in tourism and hospitality industry but for better salary and working conditions. Foreign labour force during the summer season was also tackled as a challenge for Croatian tourism, while integration of people with disability into tourism labour force as important insufficiently used resource for the future. Particularly active in previously mentioned topics were participants from educational sector, while tourism boards directors also expressed their concern with the perception of work in tourism.

Finally, participants were introduced to the concept of regenerative tourism which they were generally unfamiliar with (only two participants from private sector stated that they have heard of it and have some working knowledge on the term).

### **Tourism labour market, skills, and trainings in the tourism sector**

Participants agreed on the need for better understanding of new generations of young people and their perceptions on desirable work conditions, loyalty to the employer/company and overall motivation to make a career in tourism. Participants in the field of consultancy services and high school education especially emphasised the need for well-developed mentoring process during the student internship but also later, when young people with the lack of experience first enter into demanding tourism work.

Requested profiles in the tourism sector in the next five years, as recognised by the participants are related to the field of operations and digitalisation. Consequently, participants stated that digital skills relevant for the tourism field, such as online marketing, social media skills, need to be accompanied with emotional intelligence and leadership skills. Direct customer service and customer care, according to most of the participants, are the areas that cannot be replaced with AI, even though digitalisation enables great improvements in terms of faster and more

comprehensive responses towards different situations. Hospitality sector representative additionally highlighted business intelligence as particularly important for hotel industry, while suggestion from tourist boards were oriented on the need for new knowledge and skills for communicating sustainability towards all relevant stakeholders and efficiently manage their expectations. Trend of virtual reality as a mean of tourism offer innovation was differently interpreted and evaluated by different participants, but they all agreed that it highly depends on the context of particular destination. Creativity and entrepreneurial skills were also selected by several participants as important for future job positions in tourism. It is important to note that large majority (4 out of 6 participants) were not familiar with the existence of educational programmes in the field of sustainable tourism, but they found them important for upgrading existing knowledge and skills on all levels of work.

### **Hybrid project management**

As a final topic for the discussion, notion of project management was noted as important by the participants, but due to the structure of the focus group (only one expert in the field of project management), their level of deeper understanding of elements of project management and concept of hybrid project management was somewhat limited. Still, the project-oriented approach in tourism was acknowledged and due to the complexity of tourism, combination of traditional waterfall approach and techniques of agile and custom oriented project management were recognised to be most suitable for the dealing with discussed challenges. Stakeholder management and analysis were particularly emphasised as important for tourism development on the local level, as well as the need for integration of project managing skills for dealing with all previously mentioned challenges. As a potential useful framework and example of good practice in developing project ideas, individual potential and creativity, Whole Brain Thinking Model© (Herrmann Brain Dominance Model HBDM) was mentioned.

Project management skills are identified as needed among existing managerial working positions in tourism (in public as well as in the private sector), but also as a specific stand-alone profession relevant for tourism systems implementing project approach. Professionalization of the project manager role in the organizations is needed, yet under-recognized. Still, due to the significant number of calls for proposals and possibilities for applying for funding by proposing sustainable projects, the need for specific project management skills will only increase in the future. Participants highlighted the need for improving knowledge in the field of theory of innovations, and the participant from the project management observed the potential need for sustainability managers as separate job positions in big companies.





### 4.3 Primary (qualitative) research: The Desk Research

The purpose of this secondary research is to obtain information from various sources, existing documents, and previous research at the national level. We anticipate that the results obtained will be useful to better determine and substantiate the labour market needs of the tourism sector. Various indirect sources were analysed as part of this secondary research.

The first step in this desk research was the analysis of governmental/institutional bodies. The main emphasis was placed on the different types of documents, like development plans and strategies. In total, 29 sources were identified, with four being national relevant documents, while the other documents were specific to a certain region (county). The sustainable tourism development strategy in Croatia until 2030 was deemed as the most important document since this document was developed by the Ministry of Tourism and Sports and passed by the Croatian parliament as the official strategy. All other development plans concerning regional tourism development issues need to be aligned with this Strategy. To support these efforts, the Croatian Ministry of Science and Education is currently developing a national education development plan for the period until 2027. However, this Plan is still in development. Other regionally relevant development documents included regional tourism development plans or tourism development plans, development plans in general, and development plans for certain areas like education. Different regional development plans centre on issues identified in certain counties and usually focus on more sectors. They may include the tourism sector and/or digital transformation. Other tourism-related strategies like Tourism development plans concentrate on different issues specific to certain counties. Since tourism in Croatia is not equally developed in all counties, i.e., it is highly developed in Adriatic Croatia, tourism-related plans in Counties located in Adriatic Croatia may place importance on the development of human resources with respect to digital technology. However, tourism-related plans for counties not located in Adriatic Croatia, may not specifically deal with human development related issues.

Due to importance of both nationally relevant document (The sustainable tourism development strategy in Croatia until 2030 and National education development plan for the period until 2027), this part of desk research will focus on a thematic analysis of the previously mentioned documents.

This tourism development strategy does not directly deal with project management in relation to sustainable tourism development or human resources development. However, different issues related to sustainable tourism development were identified, more specifically development of human resources in the tourism industry. The development of human resources in the tourism industry is one of the priorities of one of the four strategic goals, i.e., the achievement of competitive and innovative tourism. Additionally, this strategy, namely the same strategic goal, also points out the importance of digital transformation in the tourism industry, by defining innovations and digital transformation of the tourism industry as another



priority area. The strategy emphasises the lack of competent employees in the tourism sector and the importance of digital literacy as two out of ten key tourism development issues and it suggests that the human resource development in Croatian tourism also focuses on lifelong education that incorporates sustainable tourism and other skills and competencies needed to achieve green and digital transformation of the tourism sector. It foresees the development of new programs that will foster the development of necessary digital-related skills needed to accomplish sustainable business practices.

The National education development plan for the period until 2027 includes, among other areas, adult education and the introduction of digital technologies in the education system. The lack of high-quality digital /hybrid learning tools was identified as one of the vital components needed to improve quality in not only higher education and adult education but in education in general. The emphasis is placed on the introduction of virtual learning environments and the creation of digitalized learning content appropriate for adult education and higher education purposes, hence, supporting the main goal of this project.

The second step was the analysis of professional and academic institutions at the national, regional, and local levels. A search of public and private universities, research institutions, public and private libraries, and electronic databases revealed three undergraduate level "project management" courses at public universities. In all courses, students are introduced to projects and project management as a form of management under turbulent market conditions, as well as their role in the business development system. Students acquire basic knowledge and skills in project management, as well as knowledge of the design and organization of project process management in a modern company. It covers project definition and project life cycle phases, as well as basic project management processes (initiation, planning, execution, supervision and control, closure) in the key areas of project management (scope, time, cost, quality, resources, procurement, communication, risks, and influencing stakeholders).

Nine courses were found at the graduate level at public universities, mainly held at study programs on economics and business economics in tourism, with the exception of three courses on project management and projects in agribusiness, project management of energy crops and waste management in agriculture, and sustainable mobility and logistics. All courses aim to provide students with an understanding of the development opportunities of project management and to provide them with competencies and skills in the application of project management methodology.

At public universities of applied sciences, five courses were found to cover areas of project management.



At private business schools, three schools offer courses and even entire study programs in project management. A two-day seminar was found, jointly organized by a private college and a research institute.

Finally, the search for journals and books on project management for sustainable tourism at the national level led to a book published in 2023 on ethical and responsible tourism and project management. On the other hand, a recent study at the supranational level investigated whether there is a link between tourism and project management in the academic literature, and if so, what is the nature of that link. In the study, author examined ten top ranked project management (IJISPM-International Journal of Information Systems and Project Management, Organisational Project Management, International Journal of Information Technology Project Management, International Journal of Project Management, Project Management Journal, International Journal of Managing Projects in Business, Acta Structulia, Revista de Gestão e Projetos, Revista de Gestão e Secretariado-Gesec, and Organization Technology and Management in Construction) and 10 top ranked tourism journals (Tourism Management, Journal of Travel Research, International Journal of Contemporary Hospitality Management, Annals of Tourism Research, Journal of Sustainable Tourism, International Journal of Hospitality Management, Cornell Hospitality Quarterly, Journal of Hospitality and Tourism Research, Current Issues in Tourism, and International Journal of Tourism Research) represented in Web of Science Core Collection (WoSCC). Project management journals do not recognize tourism as an attractive field of research because only nine papers (out from 2,995 published) refer to tourism or tourists. Additionally, from 11,332 papers published in tourism journals, 269 papers allude to projects mostly focusing on three major themes: (1) tourism development projects and their impacts in destinations, (2) local communities and stakeholders, or (3) tourist experiences. However, the term “project” refers mostly to studied cases while Project Management Knowledge Areas (PMKAs), which are the core of project management, are mentioned only sporadically. The findings suggest that the connection between tourism and PM in academia is not as strong as the business practice would suggest. Academics should pay more attention to the fact that PM knowledge needs to be applied and integrated into the tourism industry and its projects.

The third step of this secondary research was the analysis of NGOs. Analysing connections between Croatian NGO sector and project management/sustainable tourism, following insights/conclusions have been derived:

- There is a non-profit organisation gathering Croatian project managers as a branch of International PMI organisation.
- There are approximately 5 active NGOs in Croatia that specialised for education on project management. Their educational activities are mainly oriented on providing basic operational knowledge and skills related to project management adapted to the needs of non-profit organisations, including also topics like fund-raising, monitoring and evaluation of project

results and creating project proposals for various funds and programmes. As part of continuous educational activities of those NGOs, 5 publications on project management bases were created and published. Additionally, one non-profit association was identified, that is focused on project management in terms of development and implementation of projects, education on project management and creation of business plans, but with focus on cultural and tourism management. Still, deeper analysis of portfolio and current activities of this association revealed that association operates in very wide field of different activities related to civil society development and without any (current) relation to tourism.

- A large number of professional associations gather stakeholders from particular segments of the tourism sector (e.g., small and family hotels, outdoor tourism providers, tourist guides, travel agencies, etc.). Other tourism associations are formed as clusters gathering different stakeholders with the same joint interest, Cluster of health tourism of Kvarner, Cluster Lika Destination, etc. Those associations often develop collaborative projects often related to sustainable tourism initiatives.
- Special funding scheme is initiated by the Croatian Ministry of Tourism and sport, oriented explicitly on projects of NGOs in tourism which are focused on “strengthening the tourism market and human potentials in tourism”. In 2022, 15 projects of such kind were approved for financing, covering the topics of increasing interest for career in tourism and awareness-raising on accessible tourism.

## Best practices

### ***Green Project Management – WYG Consulting***

WYG Consulting as a private consultancy firm in Croatia is providing certified green project management training, accredited by GPM EMEA. The training is oriented on individuals with prior project-related experience and/or general knowledge on project management and it integrates and implements international best practices in the field of sustainability, including UN SDGs, Sustainable Accounting Standard Board Standards, Global Reporting Initiative Standards and P5 Methodology (P5 Standard for Sustainability in Projects). Training is focused on PRiSM™ (Projects integrating Sustainable Methods) as principles-based, sustainable project management methodology for better understanding of total asset lifecycle and extending beyond the typical project lifecycle. It is a five phased approach that incorporates pre-project planning, product/service adoption and integration as well as benefits realization. In other words, green project management is the application of methods, tools and techniques to achieve a specific goal, taking into account the entire life cycle of the project outcome to ensure a positive impact on the environment, society and the economy. This integrated approach to project is one of the most effective ways for organizations to achieve this balance. Not only does this approach provide benefits to the environment, but it also provides numerous benefits to the organization in the form of cost savings, risk mitigation, and improved efficiency. This was



selected as best practice example due to its successful overlapping of project management and sustainability as well as suitability in implementation in any field, including tourism.

### ***Sustainable Hotel certificate***

Few years ago, hotels from all over Croatia participated in pilot project of UPUHH – the Association of Employers in the Hotel Industry of Croatia, awarding the label "Sustainable Hotel". The UPUHH certifies the hotel's green operations, including sustainability management, environmental protection, energy efficiency, educated staff, savings in energy and water consumption, controlled CO2 emissions and others. The criteria were developed very precisely for a total of nine groups, namely: sustainability management, procurement, sales, marketing and PR, environment, energy efficiency, human resources and technical service, and the project was realized in several phases. The certificate was expanded with three additional criteria: safety and insurance, socially responsible business and F&B. In the first phase, workshops were organized for registered hotels and field audits were conducted, where each hotel had to appoint its own representative, the so-called Green Coordinator, for whom the first cycle of workshops was intended. The workshops were organized and after audits, teams of verified auditors, in cooperation with the employees of each hotel, and detailed reports prepared with collected data on energy and water consumption, type of waste, CO2 emissions, GHG inventory, etc., each hotel was offered concrete savings proposals for each segment (how to reduce energy consumption, limit harmful effects on the environment to recycling, about installing green roofs etc.). Green Coordinators, appointed by the hotel, were educated on the creation of an action plan, environmental management policy, staff involvement in work, etc. In the second phase, the hotels had to implement the project and ensure the implementation of the action plan for a period of three to five months, and after therefore, a second cycle of workshops was organized in order to analyse the achieved results. So far, 49 hotels have received the "Sustainable Hotel" label. All those who received the marks believe that they will contribute to better capacity filling, because such facilities are increasingly in demand, and ultimately reduce costs, improve the environment, increase employee motivation and improve communication with guests.

LOŠINJ HOTELS & VILLAS is a hotel brand of Jadranka turizam d.o.o., a member of one of the oldest Croatian tourist companies JADRANKA GROUP of Mali Lošinj. Their hotels Punta and Bellevue have Sustainable Hotel certificate. Additionally, this company is officially certified with Certificate of Quality ISO 9001:2015, Environmental Certificate ISO 14001:2015 and Energy Management Certification ISO 50001:2018. ISO 50001:2018 is an international norm for improving energy efficiency. By applying it in business, organizations ensure active management of energy consumption, reduction of emissions without negative impact, increased awareness of the importance of sustainable energy management among employees, as well as improvement of reputation towards clients, business partners and other interested parties. Their Hotels Aurora, Vespera, Punta, Bellevue and Alhambra have been awarded the



HACCP System certificate, signifying that the hotel operates in line with the top health and hygiene regulation for hospitality services. Vitality Hotel Punta is certified with BOSK gluten free standard.

## **5. Conclusions and Recommendations**

Based on the results obtained through qualitative and quantitative research the following issues regarding sustainable tourism development, education system, project management and implementation of digital technology in those areas are evident. First of all, the need to develop human resources in tourism industry is extremely needed due to lack of competent tourism employees. This was detected through desk research, and supported by both results gathered from expert focus group and tourism stakeholders' research. Through qualitative research, different project management programs were identified. However, they do not concentrate on sustainable tourism issues combined or hybrid project management. Our research has also identified the lack of high quality digital /hybrid learning tools needed to improve the quality of education system in Croatia.

Recommendations:

- Increase the awareness of all stakeholders about sustainable and resilient tourism practices;
- Project management professionals need to be educated on sustainable tourism;
- Tourism professionals need to be educated about project management skills;
- Both project management and tourism professionals need to improve their soft and resilience skills.
- Digital skills need to be included in the project management education;
- It is important to go beyond general project management skills and focus more on individual soft skills including leadership, creative and exploratory thinking, networking, and emotional intelligence in order to develop project manager as multi-disciplinary expert with significant understanding of how to work with different stakeholders and understand their needs;
- Education should, apart from theoretical knowledge, include elements of learning-by-doing and educating skilled tutors at work would be very helpful in transferring project management skills for sustainable tourism development to other employees.



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## Anexo D. Relatório nacional da Grécia

## Annex D. National Report of Greece



### **WP2 Labour Market Needs Analysis and Development of a New Job Profile Certification**

#### **T2.2. Identification of Labour Market Needs – National Report of Greece**



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## **1. Executive Summary**

The scope of the report is to identify and summarise the best practices, in national level, deployed in other vocational/academia training programmes regarding hybrid project management, sustainability in tourist sector, digitalisation of the sector, resilience skills (soft skills) needed in the sector, as well as best training methods for the delivery of the trainings. Additionally, it aims to document the national specificities, challenges and differences in order to compared them with the data from the other participating countries.

The main objective of the report is to implement a Needs Analysis, using qualitative and desk research methods, in order to map the skills' gaps in the above-mentioned educational fields and the labour needs of the Greek tourism industry.

## **2. Introduction**

The HyPro4ST project aims to develop a new job “Sustainable and Hybrid Project Manager” profile for the Sustainable Tourism Sector, upskill professionals in sustainable, hybrid, digital, creative and entrepreneurship project management, helping alleviate the job losses, inequalities, and other risks, and to build a talent pipeline that tourism sector can mine for future growth. It also proposes the upscaling of VET and higher education trainers' skills, to be able to adapt to the tourism labour market needs.

HyPro4ST develops a joint training programme, HyPro4ST VOOC, in accordance with the ECVET/EQF/EQAVET and Micro-credential approach, the HyPro4ST Practical Guide for trainers, a certification scheme for the new profile and the HyPro4ST Virtual Learning Hub. Through 6 Seminars, 6 online courses, 2 work-based learning activities and the transnational mobility, will enhance the competences of 700 professionals, tackling skills mismatches and supporting the formation of an effective higher and vocational education system for the sustainable tourism sector. This multi-stakeholder partnership, comprising of 17 partners from 6 European countries, develops all the outputs in 7 EU languages, ensuring their cross-border transferability. Furthermore, it assures the long-lasting effect of the project results by elaborating Policy Recommendations, able to inform the policy agendas at national and EU level.

This report has been prepared in the framework of Work Package 2 Labour Market Needs Analysis and Development of a New Job Profile and in particular Task 2.2 Identification of Labour Market Needs.

Based on the findings of the Greek national report in conjunction with the other 5 National Reports from Slovenia, Hungary, Croatia, Italy and Portugal, the new Job Profile Sustainable



Hybrid Project Manager qualification for the Sustainable Tourism Sector will be developed. The new Job Profile will respond to the identified market needs defined in the national reports.

### **3. Methodology**

In order for the appropriate data to be collected, qualitative and quantitative data collection methods were used.

#### **3.1 Data Collection Methods**

Quantitative data collection is a method of empirical social research and provides answers to questions such as who? when? where? what? and how many?

The well-structured Online Questionnaire used largely falls into this category as it consisted of closed-ended survey questions that supported the numerical data collection, by deploying the CAWI (Computer Assisted Web Interviewing) method. The layout of the online questionnaire was organized using "smart branching" to reduce complexity.

The Google Forms tool was used to collect 55 responses from the online questionnaire, which included 21 questions of the following types:

- Dichotomous
- Multiple choice
- Check-list style (Checkboxes)
- Likert scale (Linear scale)
- Rating (Multiple-choice grid)

The online questionnaire consisted of the following sections:

- Introduction providing information regarding the project and the purpose of the survey
- Data of respondents
- Sustainability, skills, training in the tourism systems
- The Hybrid Project Management profile
- Final communication

The questionnaire was shared with the project target groups (Senior managers; project managers; human resource managers; company owners; entrepreneurs; university professors; VET/Adult trainers; Tourism professionals; Others) through:

- Newsletters and/or personalised emails/messages
- Posts on the project's and Greek organisations' social media pages



Qualitative data collection was used to obtain detailed, subjective and individual knowledge on various topics.

The methods deployed in order to collect the data for the qualitative research were:

- Interviews: the members of the Consultative Body of Experts (2) and of the Focus Groups (6) were interviewed by using the 23 open-ended questions prepared and signed off by the partnership, focusing on the topics:
  - Sustainability, skills, and training in the tourism systems
  - The Hybrid Project Management profile
  - Best practices

The interviews were implemented individually and mainly online (Zoom platform), as it was not possible to bring all the members of the above-mentioned groups in one place at the same time. The answers were recorded using the note-taking method.

- Review-based scientific and grey literature research, guided by the 23 open-ended questions used while implementing the interviews:
  - Internal Desk Research – part of the Information was generated internally within the five Greek organizations.
  - External Desk Research – this type of research conducted refers to research done outside the organizational boundaries. The outside resources used are described below:
    - Online Desk Research - data available online on the internet collected by directly browsing the specific information from platforms providing scientific papers and from industrial, marketing or business sites by using the Google search engine. The search was refined in such a way that the results were promising, accurate and relevant.
    - Greek VET providers' and universities'/colleges' websites – data were collected by accessing their websites and/or through interviews/discussions with professionals working at these organisations.
    - Government published data – Ministries of Education and Tourism

## 3.2 Data Analysis Methods

### 3.2.1 Data Collection Methods

For analysing the quantitative data descriptive statics were deployed so as to summarise and organise them in a way to be easily understood. In addition, crosstab analysis – the use of data tables displaying the results of survey respondents – and cohort analysis – identifying groups of respondents who share common characteristics – were deployed (HubSpot, 2021; ScienceDirect, n.d.). Even though, Google Forms offers automated responses' summaries and

graphical representation of the responses data, these were not considered adequate and, as the survey was translated into Greek, could not be used in the national report. Therefore, other tools such as Excel or other programmes for statistical analysis were the main tools used for the data processing.

### **3.2.2 Qualitative data analysis methods**

Based on the bibliography (Hotjar, 2023) there were two methods that were used during data analysis phase:

- Content analysis: this refers to the process of categorising verbal or behavioural data to classify, summarise and tabulate the data.
- Discourse analysis: a method of analysis of naturally occurring talk and all types of written text.

Critical thinking and analytical thinking were practised in order to identify patterns and relationships within the 55 responses of the sample group.

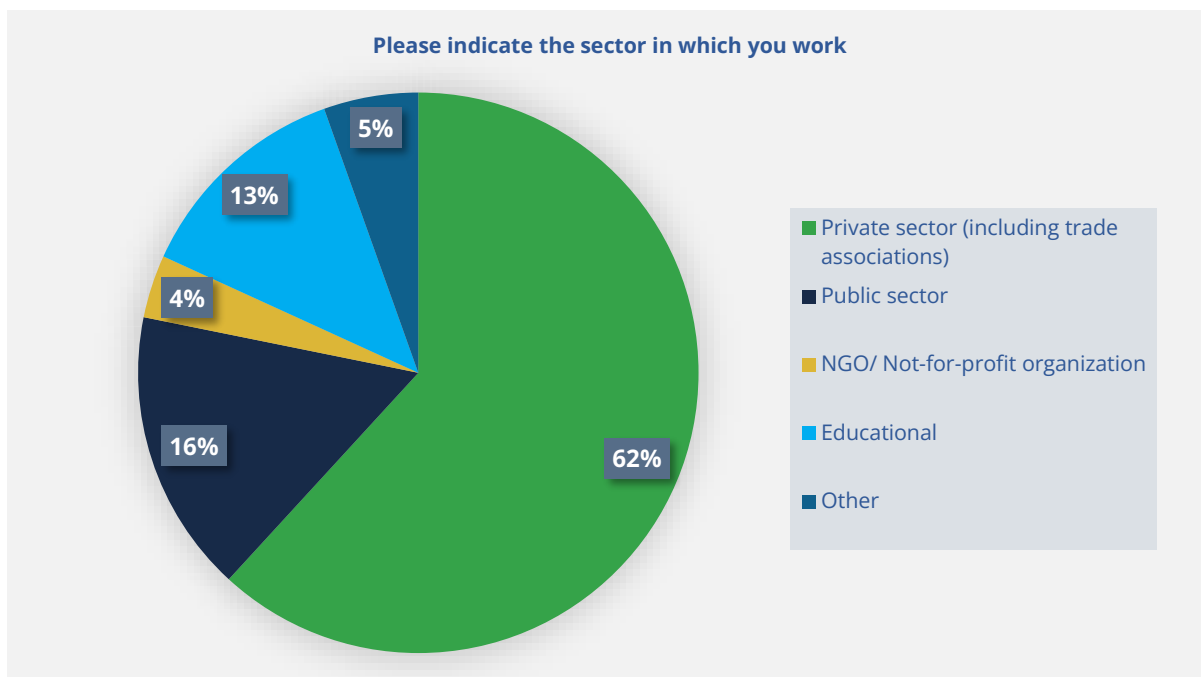
## **4. Results and Discussion**

### **4.1 Primary (quantitative) research: The Questionnaire**

The primary quantitative research was conducted through online questionnaires, using google forms. The questionnaires were distributed by all Greek partners to relevant stakeholders during March and April, focusing on different stakeholders based on different areas of the country. In Greece, 55 questionnaires were collected, providing a diverse sample.

The vast majority of respondents work in the private sector, followed by the public sector, the education sector and lastly the non-governmental sector. It should be noted that 4 of the respondents indicated that they work in a different sector.

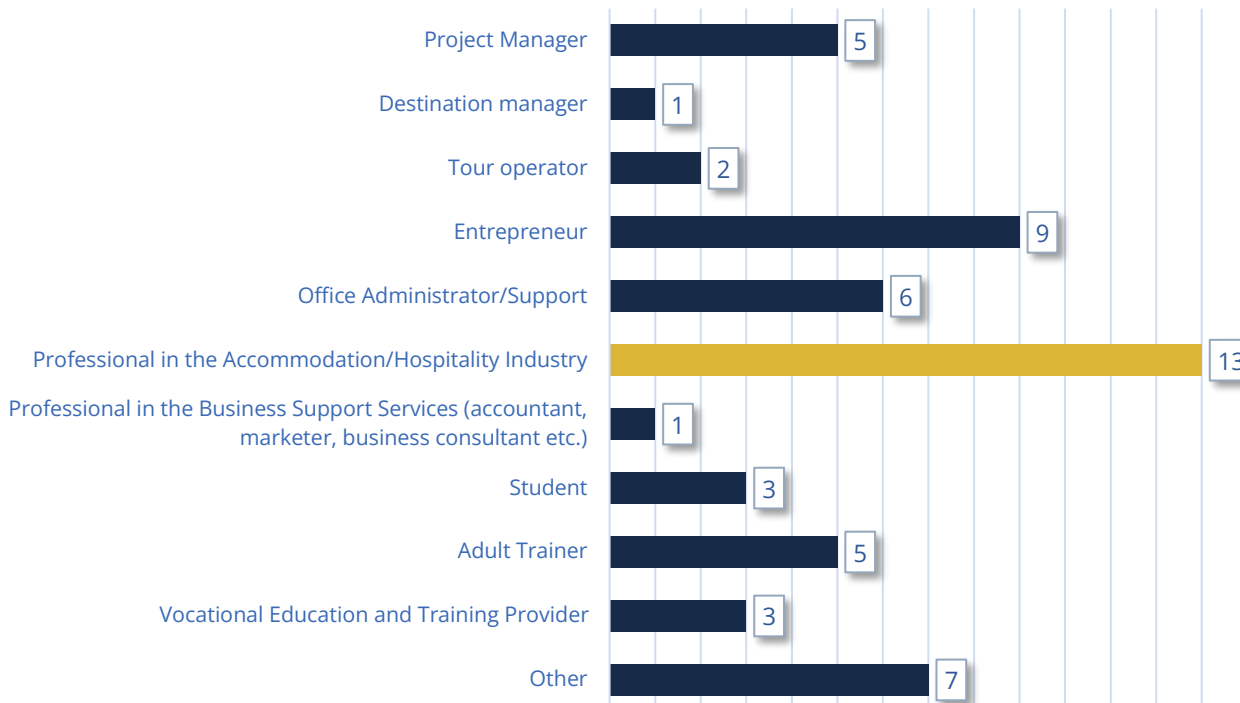




**Figure 1: Work sectors of respondents**

The majority of the respondents describe their current role as Professionals in the Accommodation/Hospitality Industry and Entrepreneurs.

**Which of the following describes best your current job/role?**



**Figure 2: Current job/roles of the respondents**

The two main age groups are 30-49 (55%) and 50-64 (27%) years old. Also, 32 respondents (58%) are women, 22 men (40%) and 1 of them (2%) declined to answer.

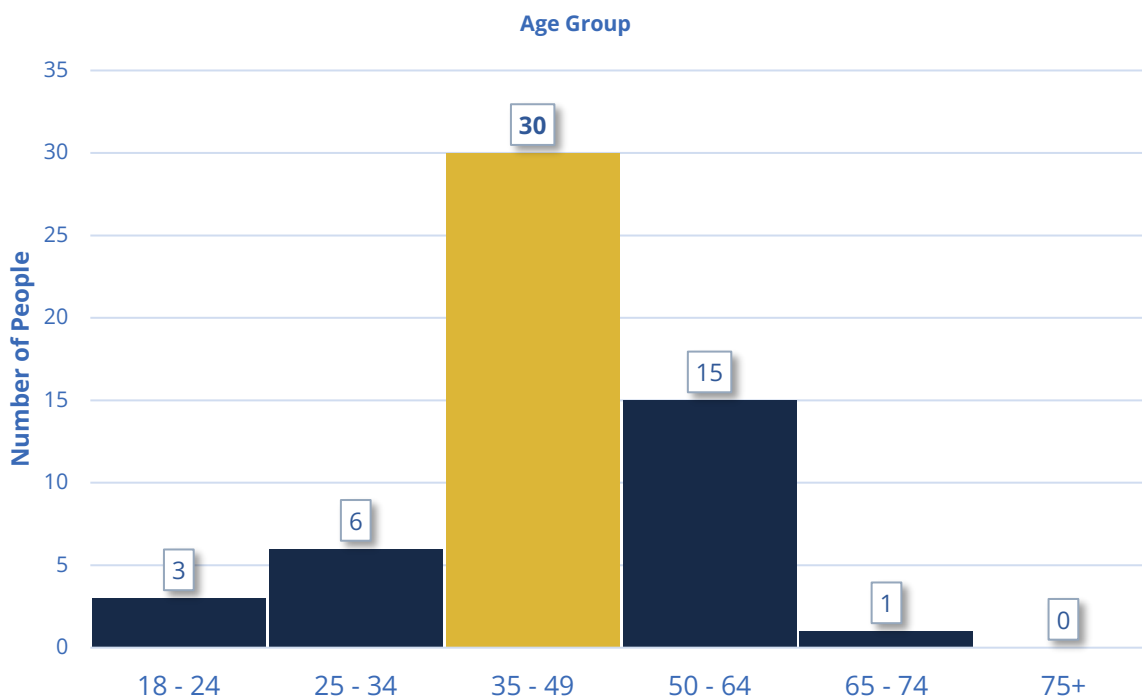


Figure 3: Age groups of the respondents

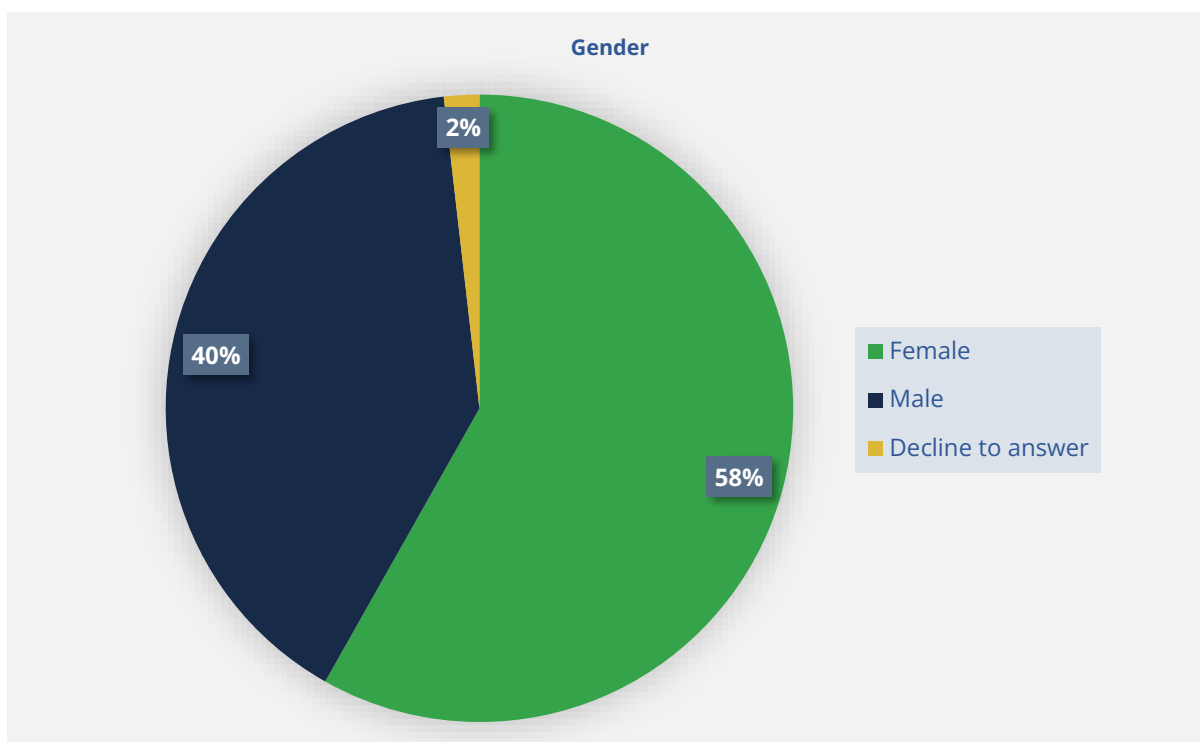


Figure 4: Gender of the respondents

Respondents believe that actions related to climate change mitigation, circular economy and biodiversity conservation are the most crucial. However, the high percentage of other responses indicates that these actions are also considered to be significantly important.



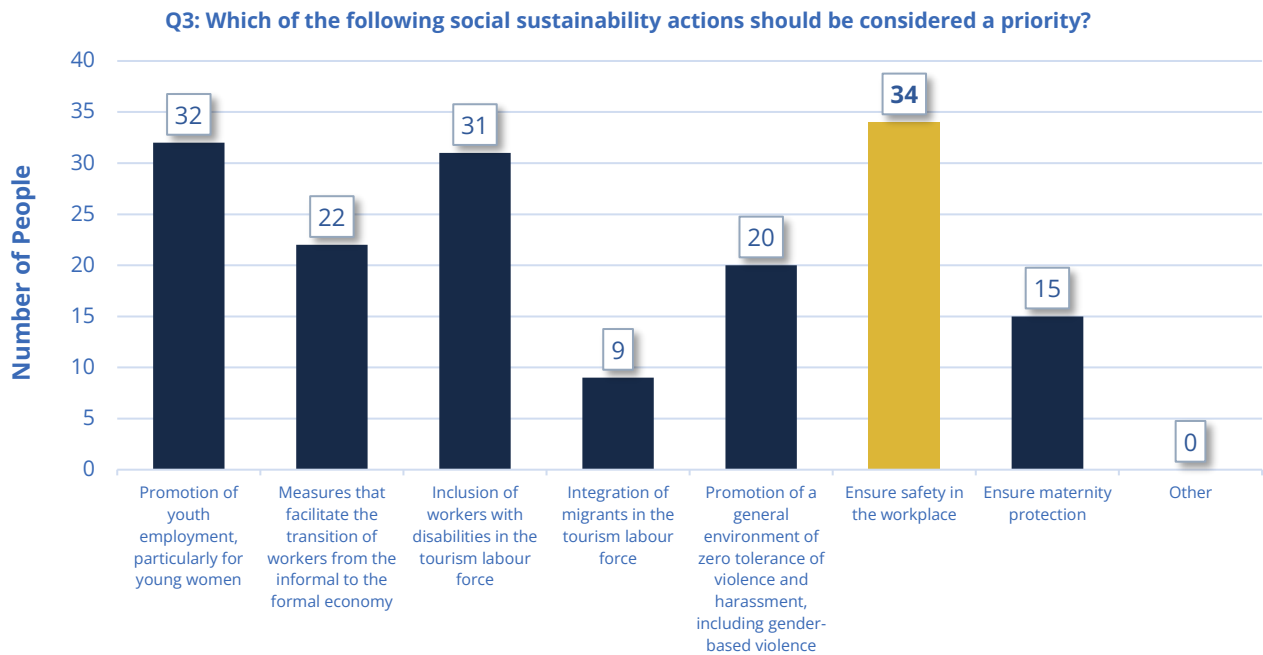
**Figure 5: Actions that should be implemented to the respondents' organizations to make tourism practices more sustainable.**

The first reason for respondents to address sustainability issues is to meet customer expectations. Also, really important is to align with the goals, mission and values of their organization and develop new growth opportunities. It should be noted that the least preferred is compliance with regulatory requirements.



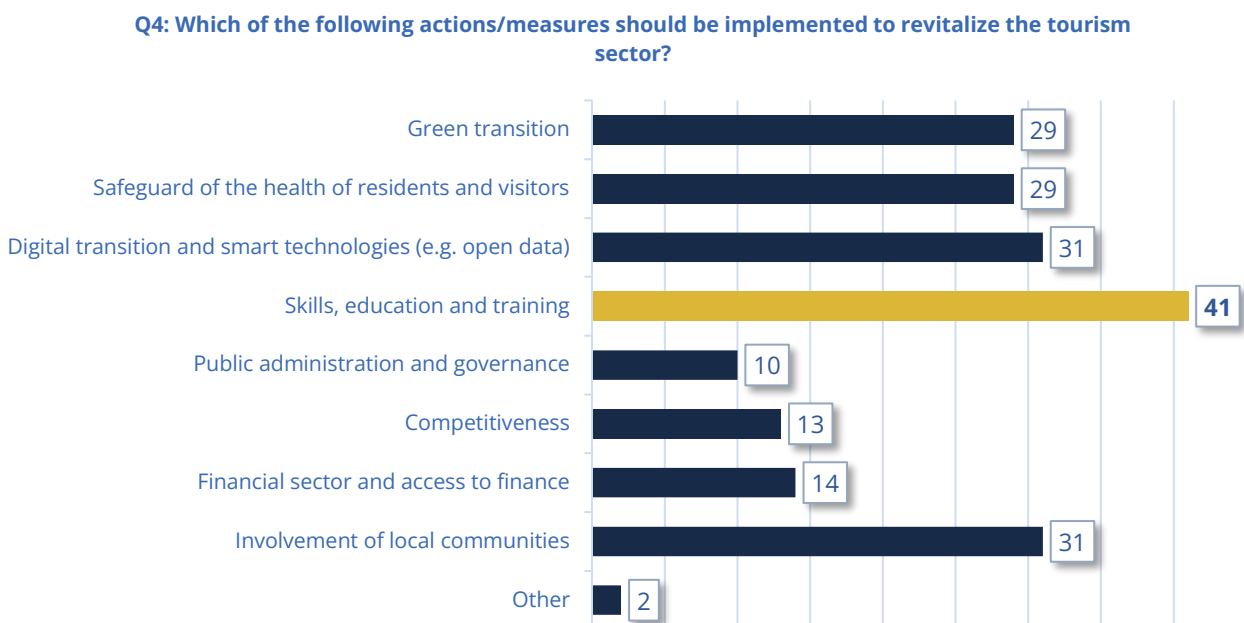
**Figure 6: Reasons for the respondents' organizations to address sustainability issues.**

The priority, according to respondents, is to ensure safety in the workplace, followed by the promotion of youth employment and inclusion of employees with disabilities in the workforce. Last on their priority list is the integration of migrants.



**Figure 7: Social sustainability actions that considered a priority by the respondents.**

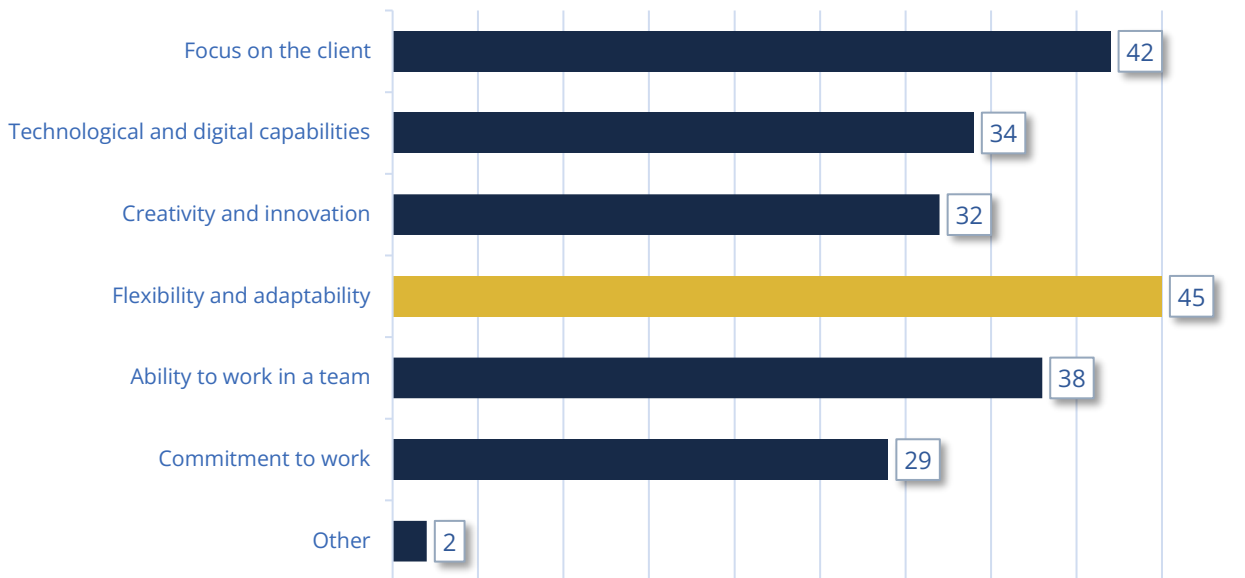
The most important action to be implemented to revitalize the tourism sector is the upskill, education and training of employees and management and the least significant is public administration and governance.



**Figure 8: Measure that should be implemented to revitalize the tourism sector.**

The most important skills for current or future employees in the tourism sector are flexibility and adaptability, whereas the least important is the commitment to work. However, even the least important skills in terms of scale appear to be important for 29 of the respondents.

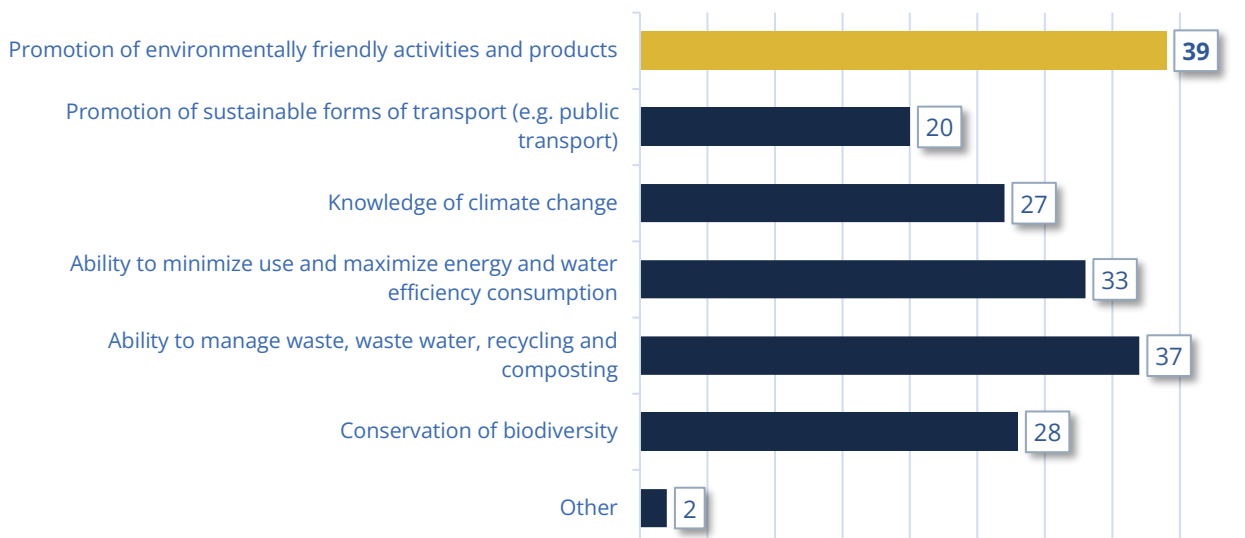
**Q5: Which of the following skills and abilities are the most important for people who want to work in the tourism sector**



**Figure 9: The most important skill and abilities for people who want to work in the tourism sector.**

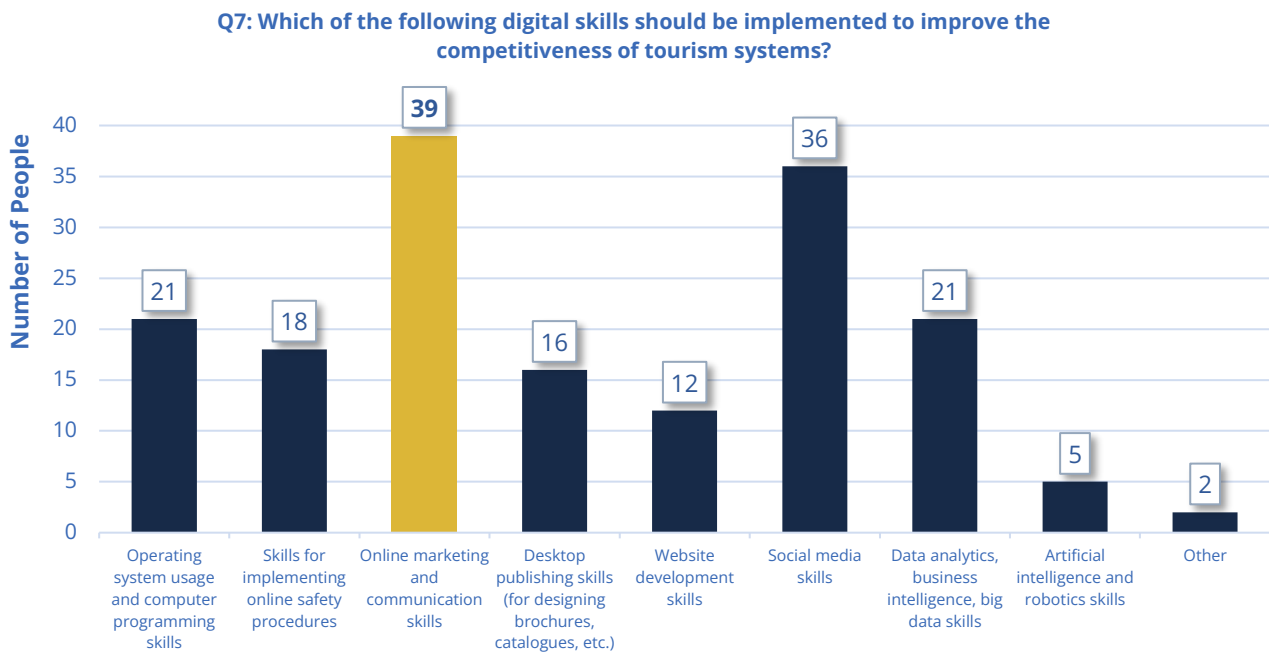
Promoting environmentally friendly activities and products is the first preference of the majority of respondents, while promoting sustainable forms of transport is the least favoured.

**Q6: Which of the following environmental skills should be implemented to improve the competitiveness of tourism systems?**



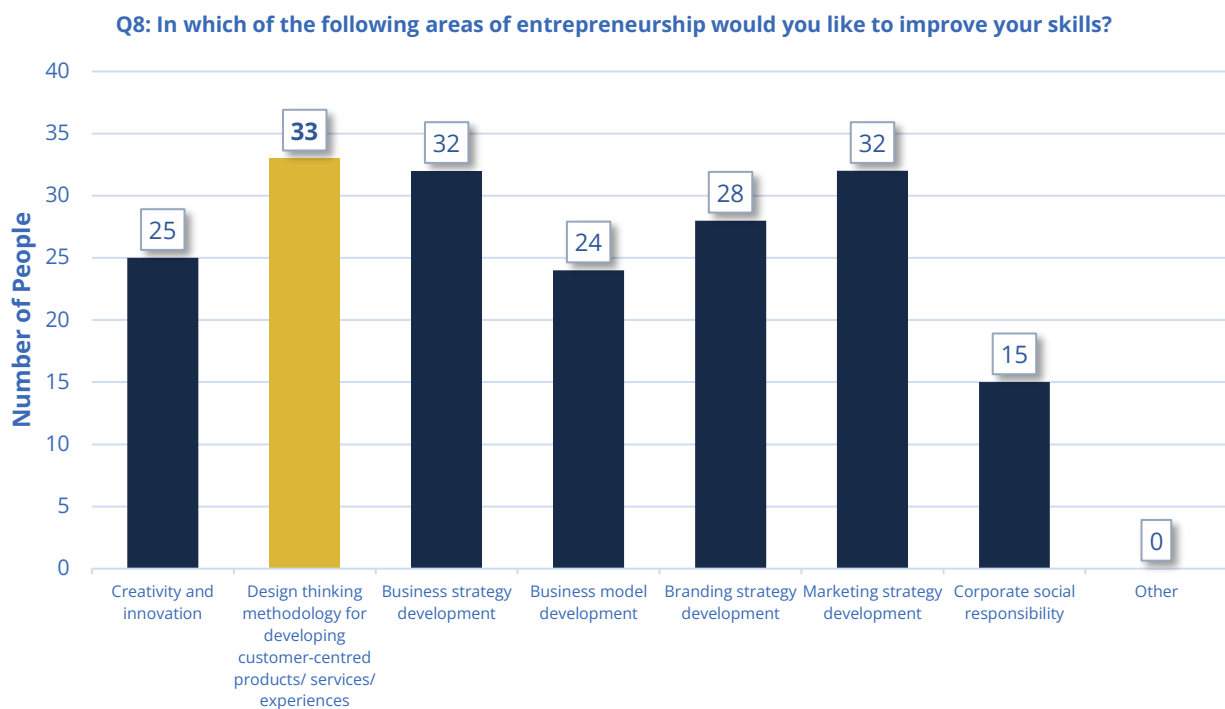
**Figure 10: Environmental skills to improve the competitiveness of tourism systems.**

Online marketing, communication and social media skills are clearly the most popular skills, while AI and robotics skills do not seem to be relevant for tourism systems.



**Figure 11: Digital skills to improve the competitiveness of tourism systems.**

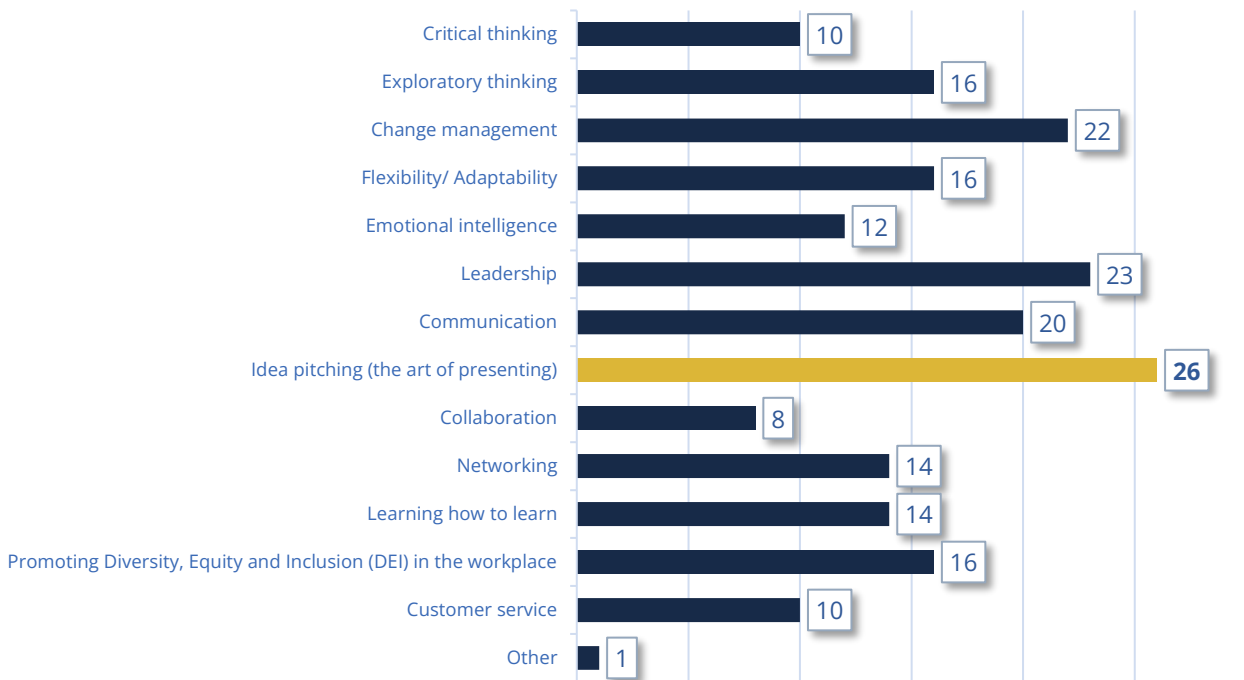
Respondents were interested in almost all areas of entrepreneurship, with the design thinking, business and marketing strategy development to be the most prominent among the responses.



**Figure 12: Entrepreneurship areas that the respondents like to improve their skills.**

In terms of soft skills, Idea Pitching and Leadership are the most highly rated, while Collaboration is the least preferred.

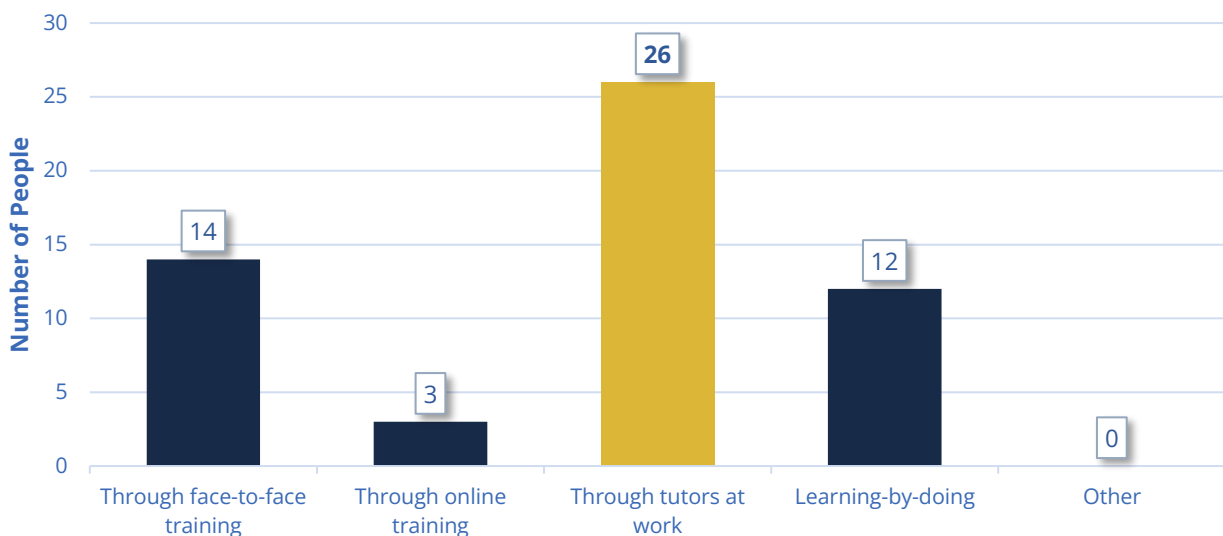
**Q9: Which of the following soft skills do you think you need to improve?**



**Figure 13: Soft skills that the respondents like to improve.**

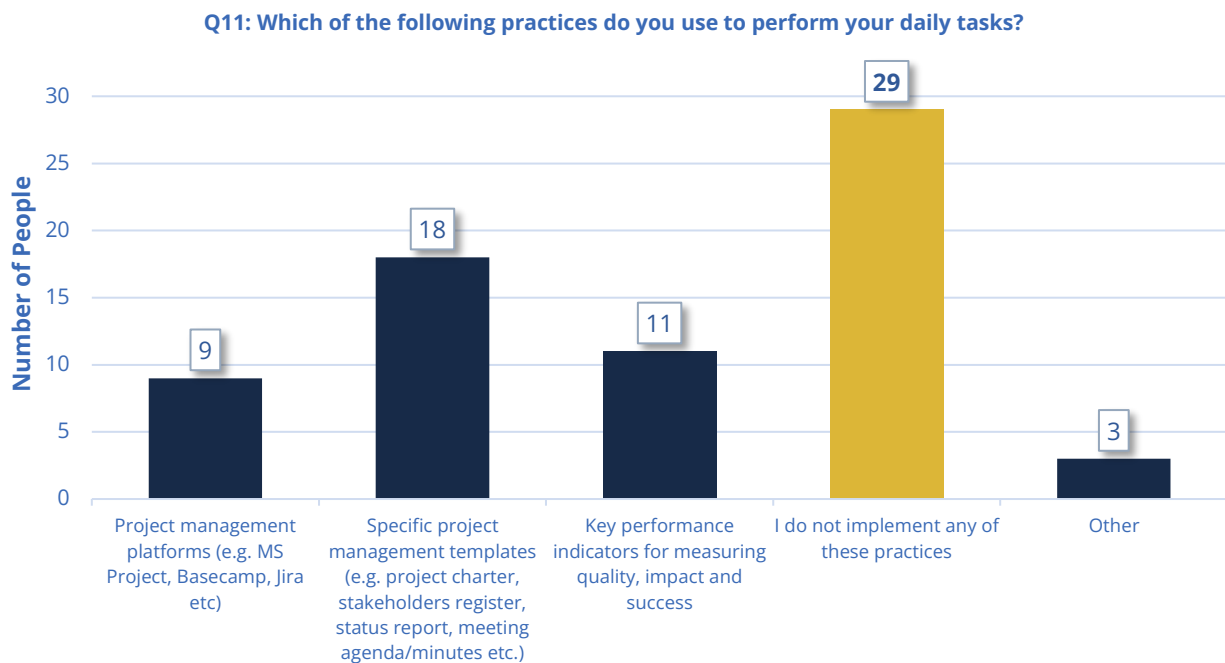
47% of the respondents believe that the most effective form of training is through tutors at work, 25% prefer face-to-face trainings, while 22% thinks learning by doing is the best way. The least preferred option is online training with 5% of responses.

**Q10: What is the most effective form for training a tourism professional?**



**Figure 14: Effectiveness of different forms of training for tourism professionals.**

It is noteworthy that the majority of the respondents do not implement any of the key practices among the project management procedures. The most preferable of the given options is the use of specific project management templates.



**Figure 15: Practices used by the respondents to perform their daily tasks.**

As shown below, the majority of the respondents have basic knowledge of the various project management processes and use them to some extent to perform their daily tasks, while a significant percentage of them have a high level of knowledge and apply them on a daily basis. There is a small to medium percentage of respondents who do not use these procedures at all. Finally, there is a stable, hence extremely small percentage, as shown by the responses, who do not even know these terms.



Q12: Please indicate the extent to which you use the following processes to implement your projects and/or perform your daily tasks.

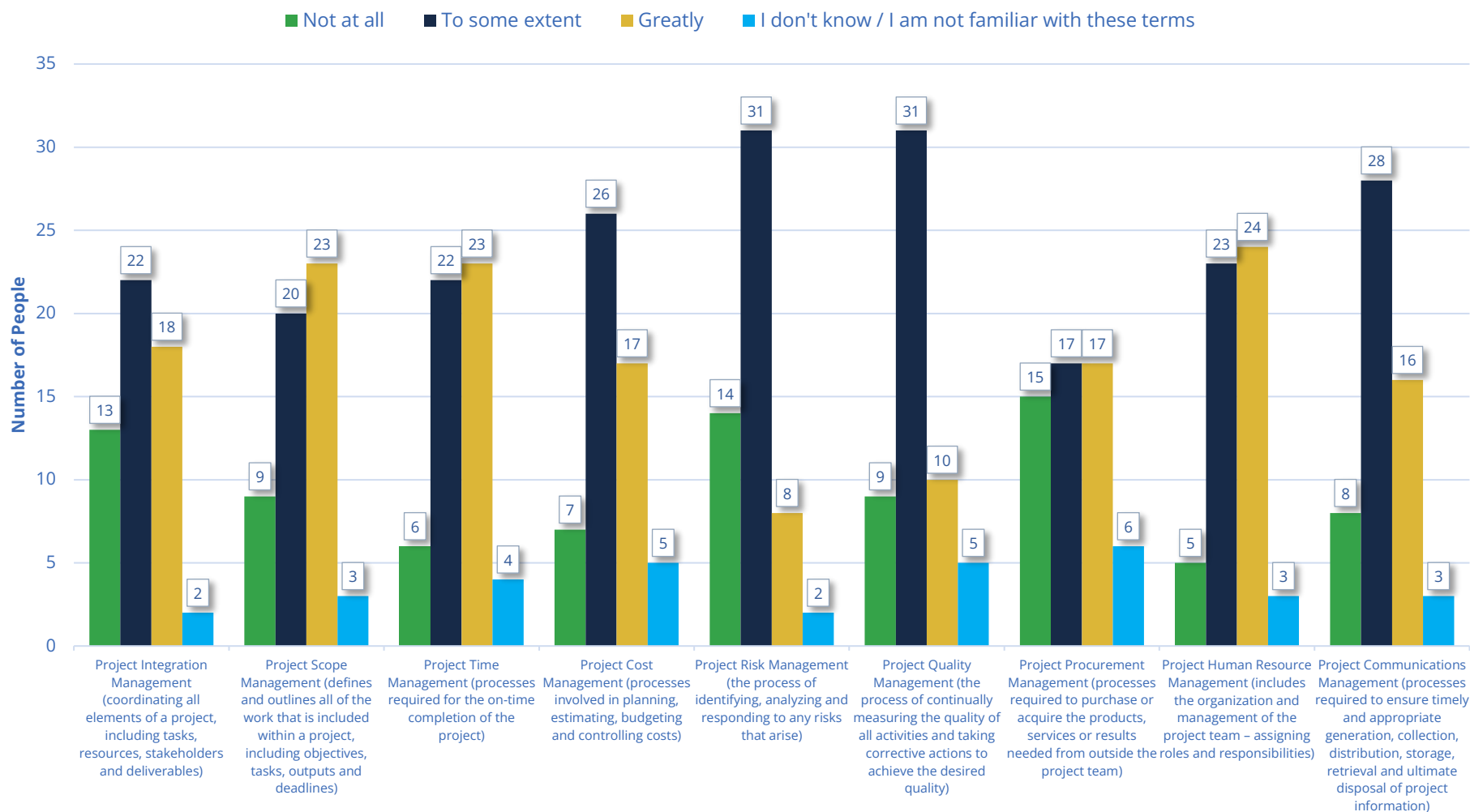
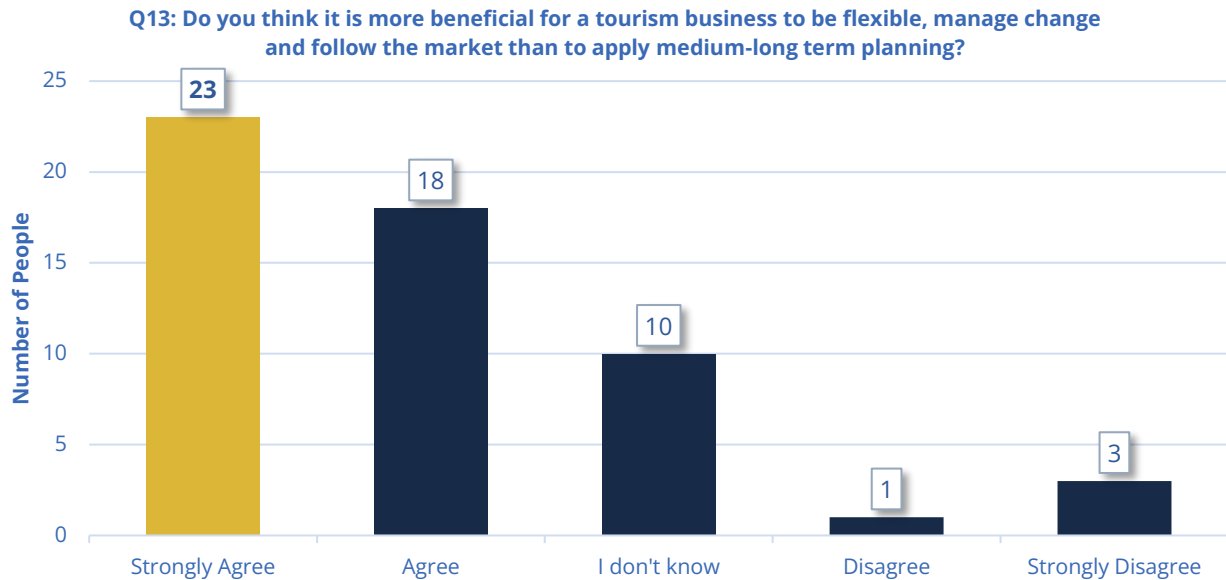


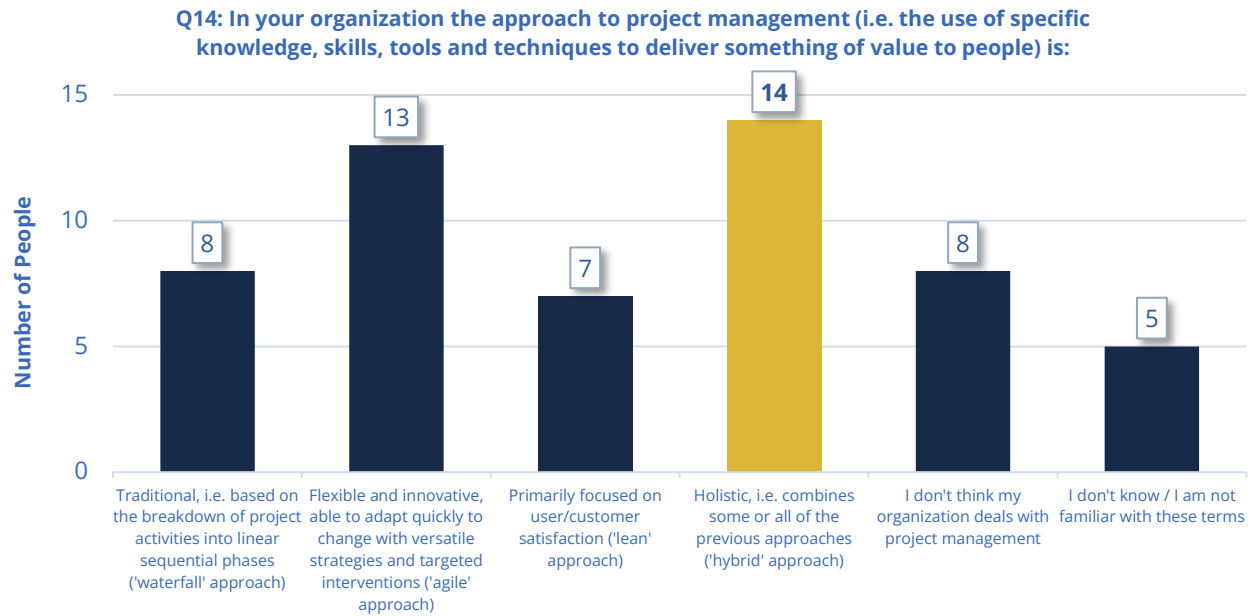
Figure 16: Extent to which respondents use different project management processes to implement their projects and/or carry out their daily tasks.

75% of the respondents strongly agree or agree that it is beneficial for a tourism business to be flexible, manage change and follow the market than to apply medium-long term planning, while the 7% strongly disagree or disagree. There is also an 18% who stated that neither agree nor disagree.



**Figure 17: Whether or not it is beneficial for a tourism business to be flexible, manage change and follow the market than to apply medium-long term planning.**

The two most popular project management approaches among the respondents are the “hybrid” (25%) and the “agile”(24%). 24% of respondents are either not familiar with these terms or are not aware if their organisation is involved in project management.



**Figure 18: The project management approaches used in the respondents' organizations.**

The vast majority of respondents do not apply project management methodologies at all in their daily activities or are not even familiar with these terms.

There is a small percentage of those who use these methodologies on a daily basis, while the percentage who use them to a great extent is extremely small.

Q15: Please indicate whether and to what extent your organization uses the following project management methodologies when implementing projects/day-to-day operations:

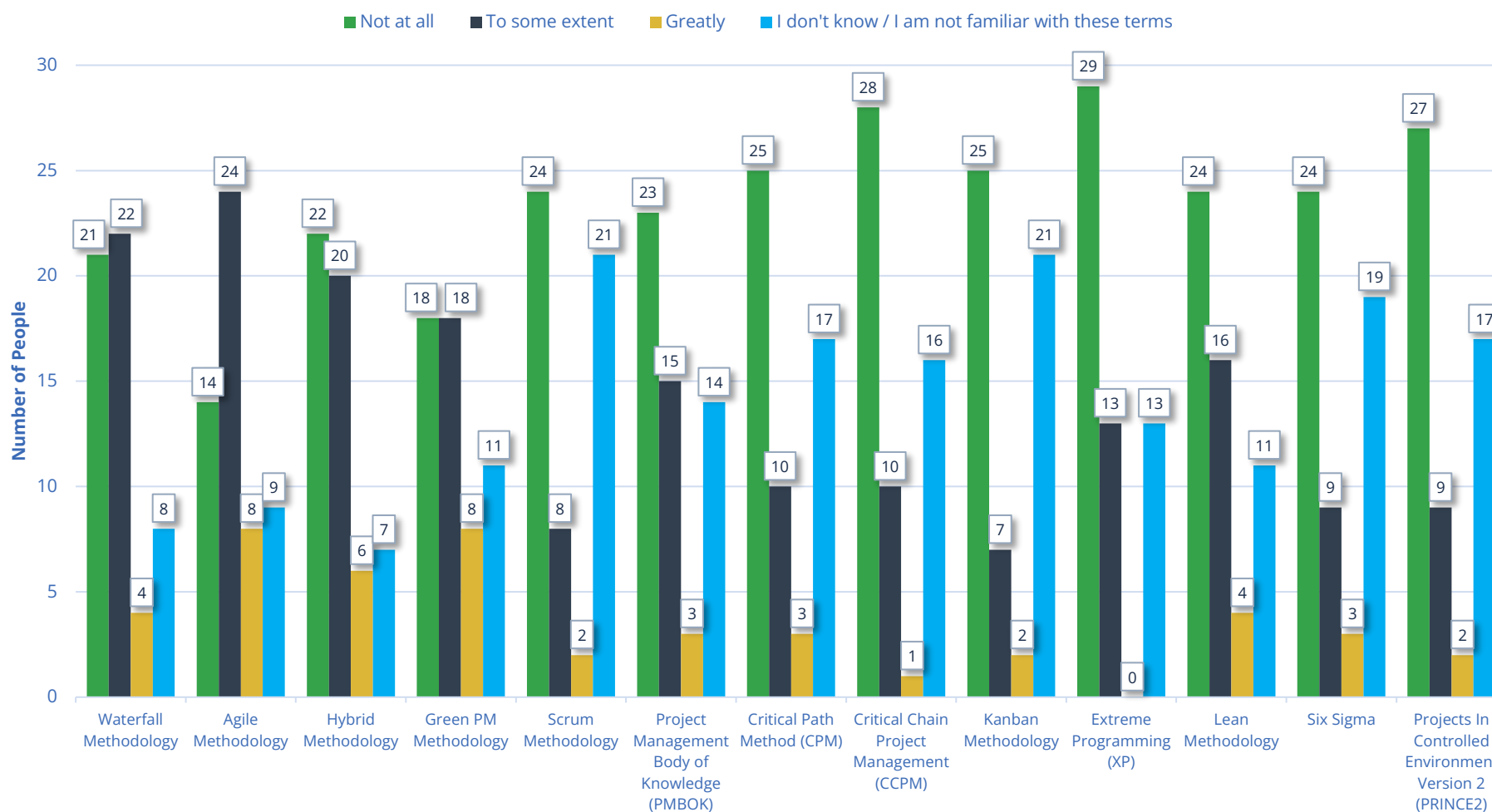
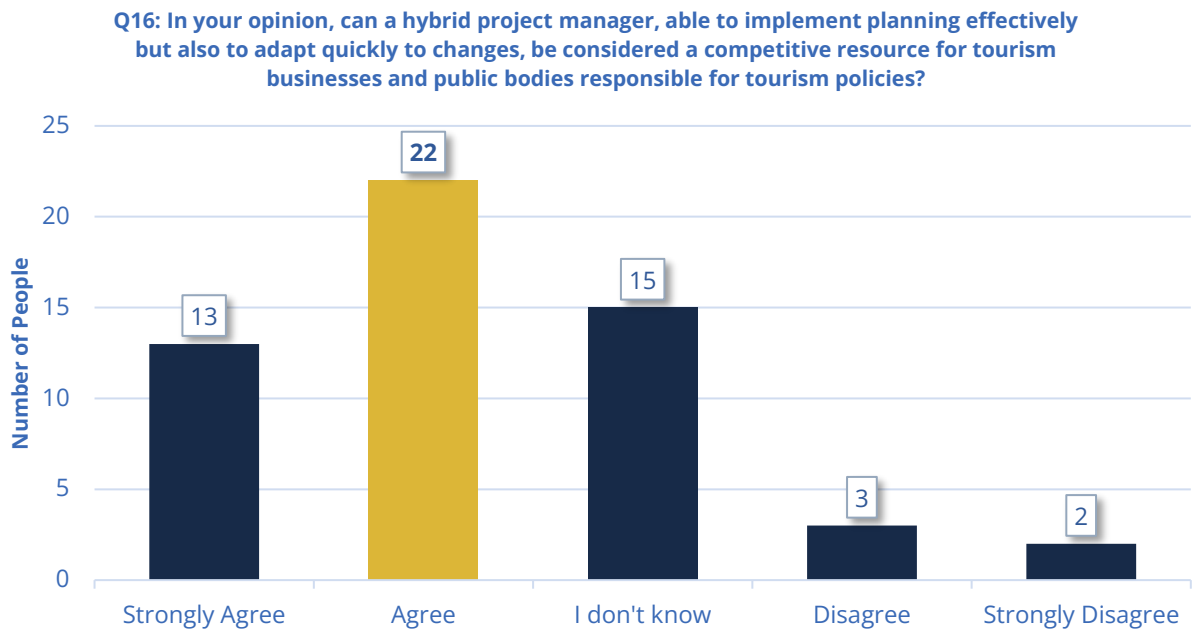


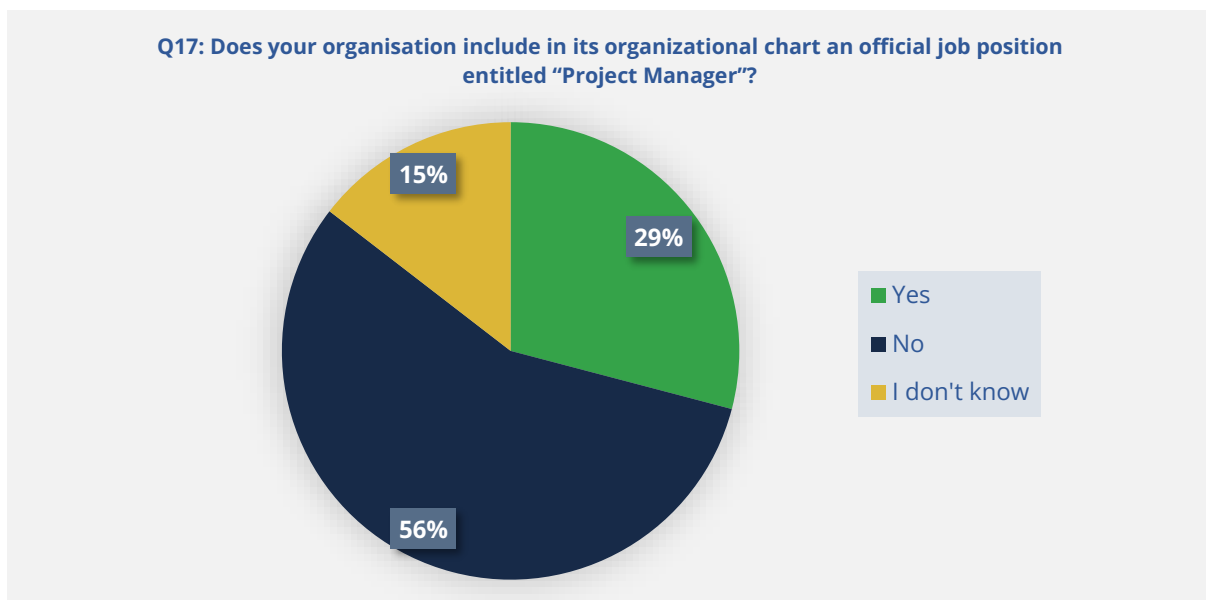
Figure 19: Whether and to what extent the respondents organization uses project management methodologies when implementing projects/day-to-day operations.

64% of the respondents strongly agree or agree that a hybrid project manager can be considered a competitive resource, while the 9% strongly disagree or disagree. There is also and 27% who stated that neither agree nor disagree.



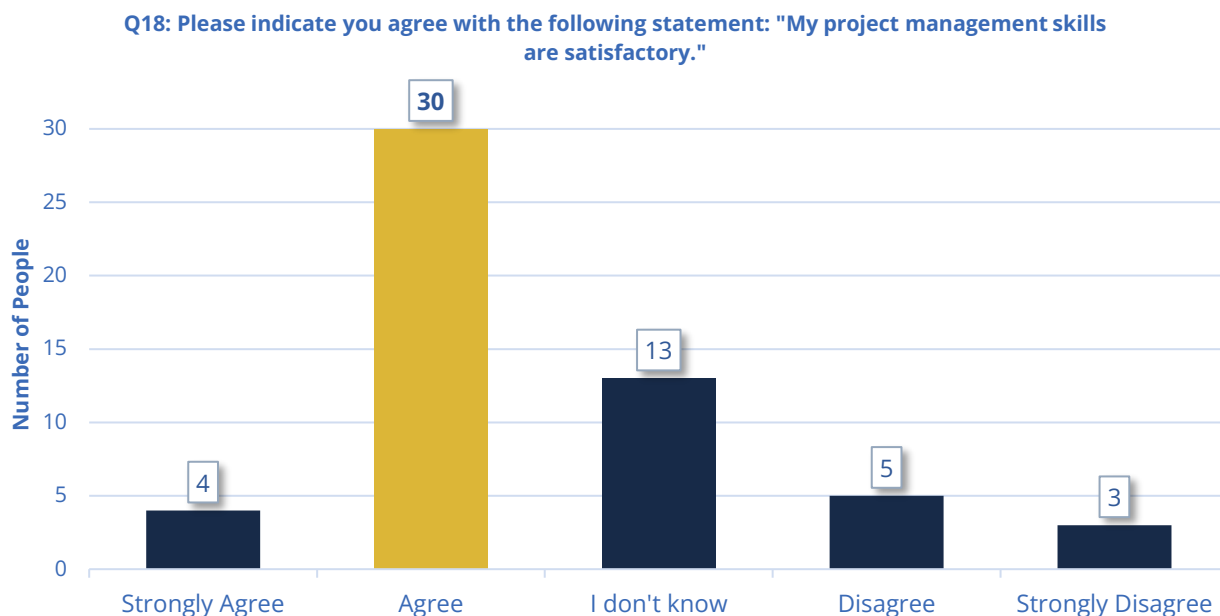
**Figure 20: Whether or not a hybrid project manager can be considered a competitive resource for tourism businesses and public bodies responsible for tourism policies.**

56% of the respondents stated that there is no official job position entitled “Project Manager” in the organizational chart, while only 29% stated that it exists. There is also a 15% that is not aware of the existence or not of this specific job position.



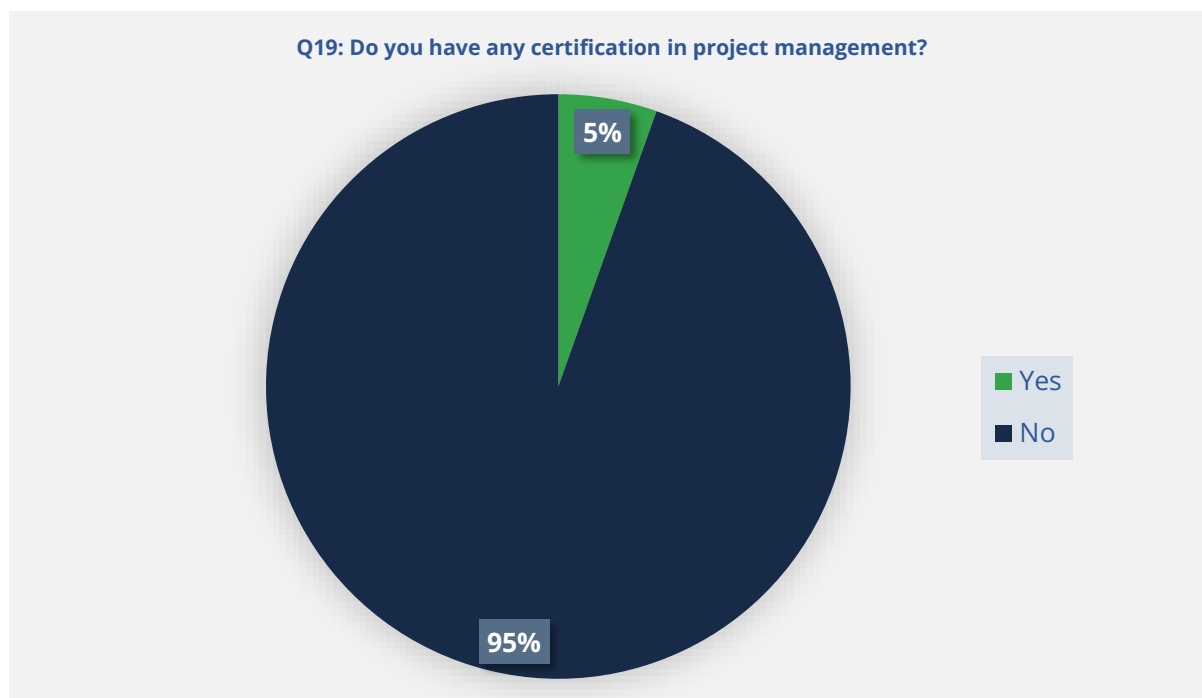
**Figure 21: Whether or not there is an official job position entitled “Project Manager” in the organizations’ chart.**

62% of the respondents find their project management skills satisfactory, while the 14% believe otherwise. There is also a 24% who neither agree nor disagree with the statement.



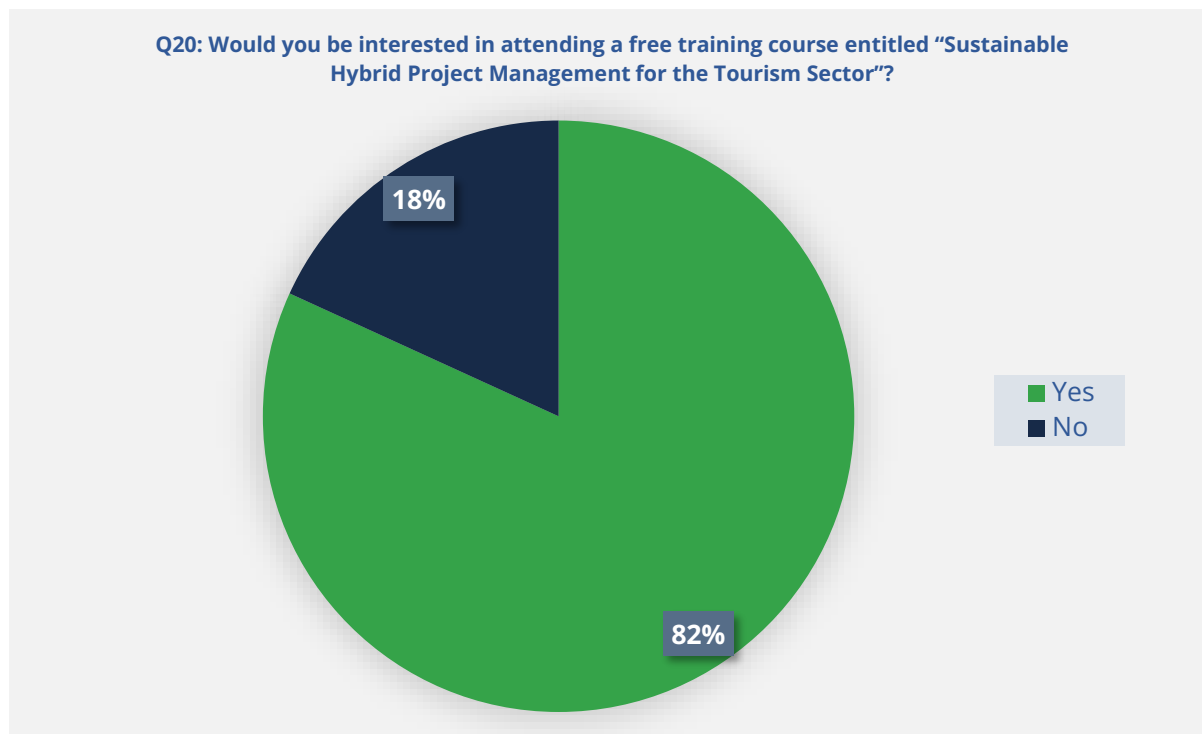
**Figure 22: Respondents agreement degree to the statement "My project management skills are satisfactory."**

It is evident that only an extremely small percentage of respondents (5%) hold a certification in project management.



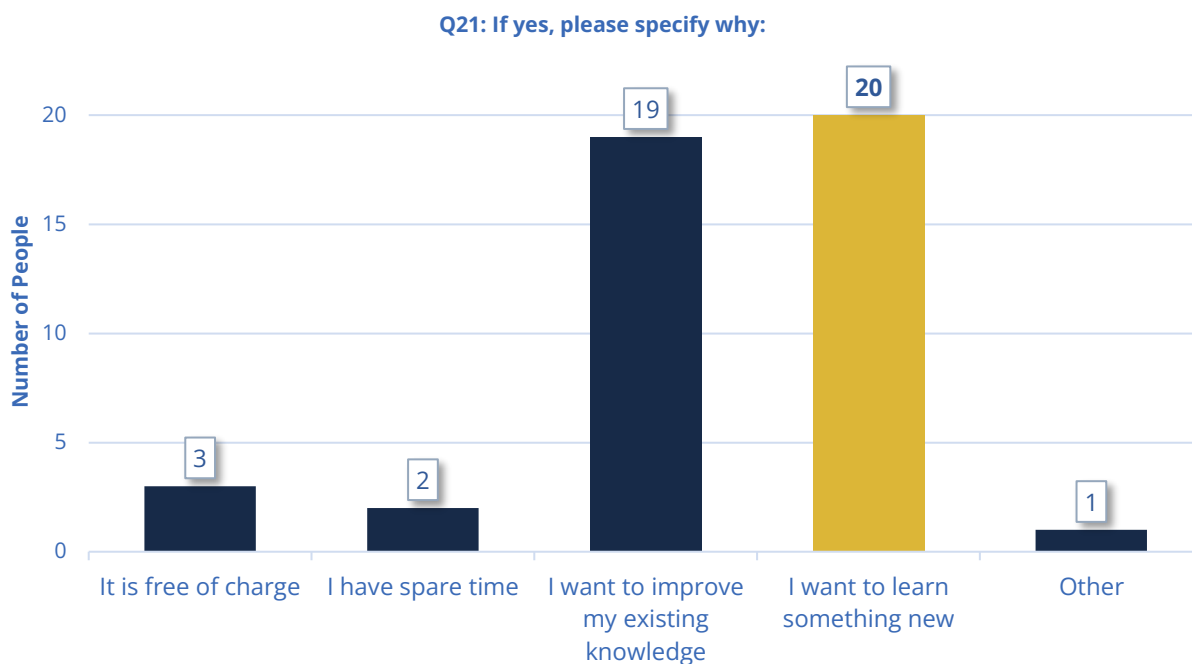
**Figure 23: Percentage of respondents holding a project management certification.**

82% of the respondents are willing to attend the training course offered by the HyPro4ST project, while 18% is not interested.



**Figure 24: Percentage of respondents interested in attending the HyPro4ST training course.**

The two main reasons for attending the training course are the willingness to learn something new (44%) and the improvement of their existing knowledge (42%).



**Figure 25: Reasons to attend the HyPro4ST training course.**

## **4.2 Primary (qualitative) research: The Focus Group / The Interviews**

### **4.2.1 Sustainable Tourism Practices in Greece**

Travelers value positively the adoption of sustainable practices by tourism businesses and emphasise on ethical behaviours. The development of technology and information about new destinations has had a significant impact.

For economic reasons, domestic tourists in Greece are interested in more traditional types of holidays. At national level, there is an initial shift towards sustainability by the private tourism sector (establishment of water-waste management, savour electricity practices Etc.) to transform tourism into a more sustainable one. However, more efforts and focused actions will be needed, especially for small and medium-sized tourism businesses.

The interviewees agree that ensuring safety in the workplace and ensuring maternity protection, as well as promoting a general environment of zero tolerance of violence and harassment, including gender-based violence, should be considered social sustainability priorities. In addition, the integration of workers with disabilities and immigrants in the tourism workforce and the ageing employment gap, especially for women, are of utmost importance.

Most interviewees were not familiar with the term "regenerative tourism" but were aware of it as a practice. However, they highlighted that it is a tourism practice that will be increasingly successful in the future, maybe not on a mass scale. Therefore, it is essential, at local level, to create a Destination Management Organization, which will be composed of managers/executives with the appropriate skills and organize workshops to inform or even train interested tourists in a structured way. It is also necessary to recruit people with diversified skills, including tourism-related and communications skills, creative thinking, networking. There is also a need to work on sustainable destination branding and marketing. Furthermore, it will contribute to the creation of a professional regenerative tourism management system. However, it cannot function independently of the existing business ecosystem; it needs to be embedded in it.

### **4.2.2 Sustainable and Hybrid Project Management in Greece**

In Greece, the concept of sustainable tourism is taught through a number of post-graduate programmes offered by HEI'S. The provision of training on sustainable tourism needs to integrate creativity and entrepreneurial skills, digital skills and resilience skills to a greater extent and in an integrated way, as it is at an early stage.

The current training system and curriculum are mainly theoretical and need to be enriched with managerial skills and adapt to the new market demands and trends to ultimately lead to sustainable development throughout the value chain integration. It is also essential for





professional and vocational training to focus more on experiential learning. Research indicates that in the next five years, tourism project management knowledge, digital, IT, marketing and operational skills will be required, as well as managers that will be familiar with sustainable practices.

Furthermore, a project manager should follow a holistic approach to designing, executing, monitoring and controlling and finally closing a tourism project. There is also a significant need the professionals working in the tourism sector to get more familiar with the term “Hybrid Project Management” since there are no related training courses that refer to this discipline.

To conclude, project initiatives could benefit all interested parties in tourism as they can drive positive change and sustainable growth.

### **4.3 Secondary (qualitative) research: The Desk Research**

#### ***4.3.1 Sustainable Practices and Trends Shaping the Future of Tourism in Greece***

Greek tourism, following the global trends, is being reshaped in four aspects, i.e. tourism landscape, growth driver, industrial logic, and growth model. New destinations, apart from the already popular ones, will become the key driving force of tourism growth in Greece. Their competitive advantages will be the basis for the identification of the appropriate strategic decisions to exploit them.

The main megatrends that are expected to have a great impact on Greek tourism are (Deloitte, Remaco & INSETE, 2021): technological development and digitalization; demographic developments; and sustainability. Megatrends will bring about significant changes for all four basic stages of travel: journey planning; the en route trip experience; the tourism experience itself; and, finally, the trip back home.

Demographic developments will have a major impact on the tourism sector over the next twenty years, but they will also create significant opportunities. In addition, they will contribute to changes in consumer behaviour, leading to new consumption patterns. Key demographic developments include: an ageing population; emerging new consumer groups; immigration and digital nomads, which have been growing rapidly in recent years due to the emergence of the coronavirus (Greek Ministry of Labour and Social Affairs, n.d.).

Tourism organizations will have an important role in the tourism development and promotion of their products & services . They have to design their strategies based on their competitive advantages and the following structural elements (Deloitte, Remaco & INSETE, 2021a; Deloitte, Remaco & INSETE, 2021b; Deloitte, Remaco & INSETE, 2021c; Deloitte & INSET, 2023; DYPA, n.d.; EcoTourism Grece.com, n.d.; European network for accessible tourism, 2023; Government Gazette, 2023; Government Gazette, 2021; GPT, 2022): Successful adoption of sustainable

development principles; adaptation to modern megatrends; embracing new technologies; adjustment to demographic changes; creation of stronger cooperation and alliances between different stakeholders to face the challenges of the global market and to improve competitiveness; creation of accessible destinations with accessible facilities; ensuring inclusive growth in each selected destination through the promotion of youth employment, especially young women; integration of employees with disabilities in the tourism workforce; development of services for tourists with disabilities; integration of migrants in the tourism workforce, because the local workforce cannot cover the demand of tourism industry; diversification of their tourist products; upgrade of the education and training of tourism professionals; and, use of Innovative Management Tools. Destination Management Organizations will have also a significant role to play in promoting destinations by utilizing innovative digital, sustainable and project management methodologies and tools, while enforcing the cooperation among all stakeholders (.

The above structure will determine the demand for skills and knowledge and in the end the most suitable job profile to serve it.

#### **4.3.2 Sustainable Tourism Education in Greece**

In the education sector, the concept of sustainable development in Greek tourism educational institutions is both very popular and elusive. The vast majority of education programs (those of tertiary level) entail at least one course related to the sustainability factor while there are postgraduate courses and VET courses dedicated to the sustainable perspective of tourism (University of Patras, 2023; Aristotle University of Thessaloniki, 2023). The curriculums in VET trainings do not entail courses dedicated to sustainable tourism (Greek Ministry of Tourism, 2023a; Greek Ministry of Tourism, 2023b; Greek Ministry of Tourism, 2023c).

Nevertheless, there is still limited academic research focusing on sustainable tourism and the specific skills are needed for the sustainable transformation of the Greek tourism sector.

The landscape of educational provisions for tourism in Greece is the following:

- Formal education in tourism is provided by the secondary (tourism specialties at vocational schools), post-secondary (tourism specialties at IEKs, apprenticeship programmes at vocational schools, Guide Schools) and higher education programmes (undergraduate tourism courses, postgraduate programmes and doctoral studies in tourism).
- Non-formal education in tourism includes seminars organised by various institutions, lifelong learning programmes on tourism-related subjects, and conferences or workshops focusing on various aspects of tourism.

Through the study of the available curricula in tertiary level education, it is obvious that even though students are trained in designing and implementing customer-centred projects and also in developing essential entrepreneurial skills, the approach of Design Thinking is not being introduced nor is the concept of Sustainable Hybrid Project Manager, i.e. approaches and methodologies that promote personalization and innovation. Training courses offered at all educational levels incorporate in general the following skills, but not always providing deep knowledge at all these skills at the same time: Digital Skills, Resilient Skills - Leadership, Emotional Intelligence, Adaptability, Flexibility, Communication and Collaboration, Becoming an Independent Learner, and Inclusion. There are no data regarding training offers related to the above-mentioned skills within the sustainable tourism educational programmes

Employers of tourism enterprises consider that there is a huge need for graduates from all levels of education (secondary vocational, post-secondary and tertiary) to get specialisation in tourism. However, they consider that by attending tourism-related seminars are getting the knowledge needed for tourism enterprises (Gousiou, 2021).

The most commonly used training methods and techniques identified are: Lectures, Multimedia use, Systemic analysis, Modelling-simulation techniques, Case studies analysis, Experiential activities, Enriched presentation with video projection, hands-on activities and workshops, presentation of good practices (in more specialized training contexts), Projects implementation. Also, trainers, for selected projects are using the methods of individual marketing plans. The acquisition of practical experience through work-based learning activities/interventions is recognized as the most effective technique and therefore adopted in all formal training.

The strategic and specific sub-objectives of the Ministry of Tourism for the period 2025-2030 in order to improve inbound tourism and support the Sustainable Tourism Development foresee actions in support of:

1. Strengthening the geographical spread of tourism through the creation of international destinations in the country and the creation of destination management bodies;
2. Lengthening the tourist season;
3. Upgrading the infrastructure of tourist areas with an emphasis on environmental friendliness (adaptiveness to climate change risks is crucial);
4. Targeted strengthening of domestic tourism, with the promotion of each destination 365 days a year.

The most requested profiles that are actually in shortage already concern the following positions: Maid, Receptionist, Waiter, Waiter/tress Assistant, Langer, Barista and Technical Support. The shortage is most intense in small hotels (Ikkos & Rasouli, 2022).

According to the study "The needs for vocational training (reskilling/upskilling) of human resources in tourism" that has been conducted by Deloitte for INSETE (2023), an extensive list

of digital skills has been identified as necessary for the improvement of the competitiveness of employees in the tourism sector.

### ***4.3.3 Sustainable Hybrid Project Management Training in Greece***

Project Management, as a distinct discipline of Business Administration Research, has significantly developed from the middle of the 20th century onwards. While the growing needs of increasing demands for innovative products and services as well as the reformulation of complex structures and systems of the sustainable tourism business environment have led necessarily to the need for the optimization of the organization, planning, and control of both the material and the immaterial resources, the Project Management discipline is totally missing from VET and university postgraduate and undergraduate programmes in hospitality and tourism management and in other programmes related to various tourism professions (technicians, housekeeping, food and beverage, travel agencies etc).

The provided educational programmes, especially the postgraduate ones on the topic of tourism management, include courses in event management and business administration, that cover some aspects of the discipline of Project Management. But none of them include a specific course in Project Management, let alone Sustainable, Agile or Hybrid Project Management.

Students and professionals of the tourism sector that would like to get trained and certified as project managers, should attend courses provided by independent training organisations which follow the PMI or PRINCE standards, including the discipline of agile but not the Sustainable and Hybrid PM, which are not specifically developed for the tourism sector (PMI Greece, 2023; Critical Path, 2023). If they want to develop their skills in sustainability, they have to follow a postgraduate programme in Environmental Management and Sustainability (Harokopio University of Athens, 2023; International Hellenic University, 2023) or take classes in order to get certified as Sustainability (ESG) Practitioners (Center of Sustainability and Excellence, 2023), or to attend independent courses offered from time to time by various private adult training companies (Ecotourism Greece, n.d.).

### ***4.3.4 Best Practices of Sustainable Tourism in Greece***

Research results show that the majority of companies in the tourism sector in Greece are underdeveloped on adopting sustainability practices. The companies that can be considered as best practices in Greece are the Luxurious Costa Navarino Hotel in Messinia, SANI-IKOS Hotel and GRECOTEL Hotel Resort.



The Costa Navarino Hotel strategy considers that associates/employees are at the heart of their efforts to promote sustainable tourism to the areas they operate. The creation of quality jobs in a safe working environment that encourages innovation, combined with the provision of high-quality training based on the talents and needs of each individual, are essential for their employees to become the ambassadors of their vision, while providing the highest quality service to their visitors. In addition, their employment policy strengthens their bonds with the local community and contributes both directly and indirectly to the economic and social development of the region. The operation of Costa Navarino in Messinia sets the paradigm of a sustainable tourism destination. All their associates/employees receive extensive training in order to develop their skills and take an active role in promoting a culture of contribution to sustainable development (Costa Navarino, 2023). We consider that the creation of a Sustainable Hybrid Project Manager will be of much importance in companies like that.

The second-best practice is SANI-IKOS Group Resort Hotel. The hotel is committed to their people's development, and they invest in employee education while they offer programmes to facilitate upskilling and career development. Employees, from their first day and throughout their careers at the Resorts, benefit from external training, professional certifications, continuous education opportunities and professional memberships. Some of the training courses that are delivered include sustainable processes knowledge such as Zero waste, environmental compliances, energy & water efficiency, biodiversity, health & safety. Even though the hotel concentrates on sustainability matters and issues ESG reports, they are missing the role of a Sustainable Hybrid Project Manager within the borders of the company who will deliver the specific skills that are required. Instead, they get external training professionals that they do not have Sustainable Hybrid Project Management Knowledge (SANI-IKOS, 2021)

The third- best practice can be considered GRECOTEL Hotel which follows an environmental sustainability strategy. The main goal of the company is to reduce the negative environmental and social impact of their business activities. GRECOTEL is actively contributing to the protection of Greek ecosystems, as they have realized that the positive image of the company is largely determined by their ability to function and expand in a sustainable manner. All employees receive training in order to get familiarized with the company's core values and code of conduct. Also, they attend thorough training programs in order to develop their skills and enhance their career opportunities. A Sustainable Hybrid Project Manager will be a very positive asset to the company's development (GRECOTEL, 2021)

## **5. Conclusions and Recommendations**

### **5.1 Conclusions**

The main conclusions drawn from the quantitative and qualitative research are of great significance as they correspond to the main scope and objectives of the project.

The research was based on professionals who have a great or extended experience in their fields and reliable sources in the field of project management and sustainable tourism.

In relation to sustainability issues, all actions related to biodiversity, climate change mitigation, circular economy development, social inclusion, well-being and to a lesser extent improving governance and finance are important, suggesting a holistic approach to sustainability. Additionally, it is evident that for the tourism sector to become sustainable, meeting consumer expectations should be a priority, alongside promoting safety, youth employment and the inclusion of workers with disabilities. While the aforementioned are considered of great importance, most of the Greek organisations active in the tourism sector don't follow sustainable practices in their daily operations and they are not aware of terms/business approaches related to sustainability, such as the Regenerative Tourism practice.

Regarding the skills of professionals, improving them seems to be the most significant driver for the revitalisation of the tourism sector and the most important skills for current or future tourism employees are flexibility and adaptability, which indicates the lack of these soft skills at the moment. Idea pitching, communication and leadership skills should also be prioritised in training offers. Resilience skills such as Change Management, and Diversity in the workplace are not at all incorporated in any of the provided training courses.

Approaches and methodologies that promote personalization and innovation of tourism products/services are not followed by the majority of Greek organisations. While the most in-demand entrepreneurial and digital skills are Design Thinking for developing consumer-centric services combined with Business and Marketing Strategy development, and Online Marketing, especially Social Media Management skills, followed by Data Analysis skills, the existing skills gap is big.

As far as Project Management skills are concerned, a paradox was observed, especially in quantitative research. Professionals are either not familiar with basic terms and processes related to project management or do not use them to conduct their daily work. However, they consider their project management skills to be satisfactory, while almost none of them is certified as a Project Manager, and they indicated as the most popular project management approach the hybrid. This paradox showcases that people working in the tourism sector are not aware of what exactly Project Management is and probably they confuse the components of Project Management with other operational business activities. Furthermore, the majority of



Greek tourism organisations don't include in their organizational chart the job position of "Project Manager".

The lack of sustainable mindset and practices in Greek tourism organisations could be justified by the fact that sustainable tourism education has not yet been embedded in tertiary education. In Vocational Education and Training and in undergraduate Higher Education offerings the topic of "Sustainability in Tourism" is totally absent. Only some postgraduate diplomas cover it. The same stands for the "Project Management" discipline and especially for the "Hybrid and Sustainable Project Management". There is no educational programme that combines Hybrid and Sustainable Project Management practices, which are driven by national and international trends and challenges and that address the needs of the tourism sector and consequently, the needs of the professionals working in the sector.

Research indicated that the Greek tourism educational area needs innovative training interventions, that could have also the form of seminars/workshops, following the experiential and work-based learning approaches. Additionally, it seems that there is no VET course in tourism sustainability and in general in tourism, entrepreneurship, digital and soft skills that the newly acquired qualifications are validated by deploying advanced tools like micro-credentials (DISCO VET, 2022).

Finally, the research findings designated a lack of bibliographic and other scientific sources that are dedicated to the topics of sustainability and Project Management in the tourism sector.

To conclude, there is a great lack of knowledge in the field of Hybrid and Sustainable Project Management that is combined with a skill set comprised of essential entrepreneurial, digital, soft and resilience skills.

It is more than evident that the development of a new job profile and a certified training programme delivered via advanced experiential and work-based training experiences leading to the acquisition of micro-credentials, that correspond to the above-mentioned skills gap, is crucial for the Greek tourism sector to become sustainable and competitive, and meet the challenges and trends of the industry. It is also imperative for the professionals of the sector to acquire new skills in the aforementioned fields, in order to be able to meet the labour market needs and increase their mobility.

## 5.2 Recommendations

The **recommendations** that can be provided based on the research conducted, focus firstly on the need to create a new job profile named "Sustainable Hybrid Project Manager" and secondly for upskilling/reskilling students and professionals working in the tourism sector in the field of Sustainable, Hybrid, Digital and Entrepreneurship-oriented Project Management.



Based on the quantitative and qualitative research, it is recommended to develop and design courses that will:

- Introduce the participants in project management, and especially hybrid project management through advanced instructional strategies and methodologies;
- Familiarize the tourism professionals and students with the terms: sustainability (green skills), design thinking (creativity), entrepreneurship and digitalization (digital skills);
- Improve the soft and resilience skills of tourism professionals and students;
- Reskill/upskill the current and prospective project managers and boost behavioural change;
- Prepare tourism professionals and students to become hybrid project managers that have the ability to plan effectively but also to adapt quickly to changes, by providing a common qualification standard;
- Help the transformation of the tourism sector into a sustainable and resilience industry.

Therefore, the conclusion of the country-level research clearly demonstrates that it is imperative that the Greek VET/HE system be updated and upgraded in terms of providing the tourism industry with relevant to the EU frameworks and market demands, regarding Sustainable, Hybrid, Digital and Entrepreneurship oriented Project Management, future-proofed curricula, and in terms of advanced methods in teaching and validating skills/competencies.

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## Anexo E. Relatório nacional da Hungria

## Annex E. National Report of Hungary



### **WP2 Labour Market Needs Analysis and Development of a New Job Profile Certification**

#### **T2.2. Identification of Labour Market Needs – National Report of Hungary**



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## 1. Executive Summary

The aim of the analysis is to identify the current situation and market needs in Hungary, in order to help the creation of a new job profile, "Sustainable and Hybrid Project Manager", to be developed by the HyPro4ST project funded by the Erasmus+ Programme.

3 methods were used for this analysis:

- online questionnaire to be completed by at least 50 respondents,
- focus group survey of 6 people through individual interviews,
- desk research included the identification of 2 good practices.

In Hungary the analysis was carried out jointly by Minerva 90 Ltd and the Central Transdanubian Regional Innovation Agency.

Based on the information gathered through various methods, it can be said that in Hungary tourism is not necessarily given the importance it deserves, neither in development documents nor in education. Sustainability is not an unfamiliar concept, it can be found in many places, but in most cases as a mandatory element without any underlying content. In higher education, tourism is an established subject in many institutions, but the number of students is decreasing, and the curriculum is not up to modern standards. The management approach is completely absent from both education and the practical implementation of tourism. In this light, the sustainable, hybrid project management profile and the educational background required for this are urgently needed.

## 2. Introduction

HyPro4ST project funded by Erasmus+ Program seeks to bring positive social and sustainable impact to tourism sector. It aims to develop a new job "Sustainable and Hybrid Project Manager" profile for the Sustainable Tourism Sector, upskill professionals in sustainable, hybrid, digital, creative and entrepreneurship project management, helping alleviate the job losses, inequalities, and other risks, and to build a talent pipeline that tourism sector can mine for future growth.

In order to develop the "Sustainable and Hybrid Project Manager" profile, a labour market survey was carried out in all partner countries to assess market needs and define the current situation.

The same 3 methods are used for this analysis in all partner countries. Firstly, by means of an online questionnaire developed by the partnership, to be completed by at least 50 respondents per country. Secondly, a focus group survey of 6 people, which can be carried out either in a workshop or through individual interviews. In addition, desk research was carried out by the

partners in each partner country, which included the identification of 2-4 good practices per country. In Hungary the analysis was carried out jointly by Minerva 90 Ltd and the Central Transdanubian Regional Innovation Agency.

### **3. Methodology**

The methodology followed was the one proposed by the consortium (as mentioned in the guidelines given).

### **4. Results and Discussion**

The project questionnaire was translated into Hungarian and used as an online Google questionnaire. To fill in the questionnaire, we tried to involve stakeholders from different sectors and different types of organisations with some interest in tourism. We tried to reach organisations and experts in the field of education as well as experts in the field of project management. The questionnaires were distributed by direct contact to the organisations and experts we considered competent. In total, 51 respondents were collected from all over Hungary.

#### **4.1 Primary (quantitative) research: The Questionnaire**

The project questionnaire was translated into Hungarian and used as an online Google questionnaire. To fill in the questionnaire, we tried to involve stakeholders from different sectors and different types of organisations with some interest in tourism. We tried to reach organisations and experts in the field of education as well as experts in the field of project management. The questionnaires were distributed by direct contact to the organisations and experts we considered competent. In total, 51 respondents were collected from all over Hungary.

Below is a summary of the information gathered from questionnaires.

#### **GENERAL INFORMATION ABOUT THE RESPONDENTS**

- Sectoral: 39.2% private sector, 25.5% educational, 23.5% NGO, 11.8% public sector.
- Current job/role: Of the very wide range of possible answers, almost all have been ticked. However, the 4 largest groups were entrepreneur (17.6%), adult trainer (15.7%), project manager (13.7%) and tour organiser (11.8%).
- Age group: 35-49 (51%), 50-64 (21.6%), 25-34 (17.6%), 65-74 (7.8%), 18-24 (2%).



- Gender: 54.9% female, 43.1% male, 2% nonconforming

## **SUSTAINABILITY, SKILLS AND TRAINING IN THE TOURISM SYSTEMS**

### ***Q1: What concrete actions should your organization implement to make tourism practices more sustainable?***

All answer options were marked by a significant number. The two most popular choices were "Actions to improve governance and finance" 47.1% and "Actions to improve people's well-being and health" 43.1%. The lowest number of votes was for "Actions to promote social inclusion" with 25.5%.

### ***Q2: What do you think are the reasons why your organization address or could address sustainability issues?***

Due to multiple choice, all possible answers were ticked, and the distribution of answers was almost even. "Attract, motivate and retain employees" was the least marked with 19.6%. The most votes were for "Improve operational efficiency" with 41.2%.

### ***Q3: Which of the following social sustainability actions should be considered a priority?***

Responses were more divided on social sustainability. The most prominent responses were "Promotion of youth employment, particularly for young women" 49% and "Measures that facilitate the transition of workers from the informal to the formal economy" 47.1%. The lowest response was "Integration of migrants in the tourism labour force" 21.6%.

### ***Q4: Which of the following actions/measures should be implemented to revitalize the tourism sector?***

Respondents ranked "Public administration and governance" 47.1% and "Skills, education and training" 43.1% as the most important areas. "Safeguard of the health of residents and visitors" was ranked as the least important by 11.8%. One respondent also added "Overtourism mitigation".

### ***Q5: Which of the following skills and abilities are the most important for people who want to work in the tourism sector?***



Two possible answers received by far the most votes. "Focus on the client" 76.5% and "Flexibility and adaptability" 70.6%. Interestingly, "Technological and digital capabilities" was the least important with 21.6%.

**Q6: Which of the following environmental skills should be implemented to improve the competitiveness of tourism systems?**

The 3 most important areas for the environment were "Ability to minimise consumption and maximise energy and water efficiency" 56.9%, "Ability to manage waste, waste water, recycling and composting" 56.9% and "Promote sustainable forms of transport" 51%. "Conservation of biodiversity" was considered the least important by respondents with 23.5%.

**Q7: Which of the following digital skills should be implemented to improve the competitiveness of tourism systems?**

"Online marketing and communication skills" 66.7%, "Social media skills" 54.9% and "Website design skills" 52.9% are the most important. "Artificial intelligence and robotics skills" 15.7% are the least important. Otherwise, "Impact of complex regulatory issues" appeared.

**Q8: In which of the following areas of entrepreneurship would you like to improve your skills?**

Two answers received the most votes, "Creativity and innovation" 49% and "Marketing strategy development" 49%. The other answers were more or less evenly split.

**Q9: Which of the following soft skills do you think you need to improve?**

The skills most in need of improvement were "Flexibility/Adaptability" 41.2%, "Leadership" and "Communication" 39-39%. The skills that need least improvement are "Customer service" 11.8% and "Promoting Diversity, Equity and Inclusion (DEI) in the workplace" 13.7%

**Q10. What is the most effective form for training a tourism professional?**

The responses were completely split: 29.4% face-to-face, 27.5% through tutors at work, 23.5% online, 17.6% learning-by-doing.

## THE HYBRID PROJECT MANAGEMENT PROFILE

**Q11: Which of the following practices do you use to perform your daily tasks?**

More than half of the respondents (54.9%) do not use any of these practices. Among the other responses, the markings were more or less evenly distributed.

**Q12: Please indicate the extent to which you use the following processes to implement your projects and/or perform your daily tasks.**

The question concealed a very complex set of possible answers. Based on the answers, it can be said that time and cost management is what respondents use most. The other cases were dominated by answers that were not at all or to some extent. The least known processes were "Project Integration Management" and "Project Scope Management".

**Q13: Do you think it is more beneficial for a tourism business to be flexible, manage change and follow the market than to apply medium-long term planning?**

More than 49% of respondents agree with the statement and only 25.5% disagree, which is exactly the same as the number who have no opinion.

**Q14: In your organization the approach to project management is:**

The traditional approach received the most votes, with 27.5% of respondents indicating it. Only 5.9% of respondents could not answer. There was not much difference between the other response options.

**Q15: Please indicate whether and to what extent your organization uses the following project management methodologies when implementing projects/day-to-day operations:**

For all methods, most of the marks were for not knowing the method! Only in the case of the "Waterfall Methodology" can it be said that respondents use it to some extent.

**Q16: In your opinion, can a hybrid project manager, able to implement planning effectively but also to adapt quickly to changes, be considered a competitive resource for tourism businesses and public bodies responsible for tourism policies?**

More than half of respondents (50.9%) think a hybrid project manager can be a competitive resource, and only 27.5% think not.

**Q17: Does your organisation include in its organizational chart an official job position entitled "Project Manager"?**

70.6% of respondents indicated that they did not have such a job position, compared to only 19.6% where they did.

**Q18: Please indicate you agree with the following statement: "My project management skills are satisfactory."**

41.2% of respondents do not know. Only 22.9% are satisfied with their skills.

**Q19: Do you have any certification in project management?**

Only 21.6% of respondents have a certificate in this field.

**Q20: Would you be interested in attending a free training course entitled "Sustainable Hybrid Project Management for the Tourism Sector"?**

The majority of respondents (56.9%) would be interested in training.

**Q21: If yes, please specify why:**

77.3% would like to improve their existing knowledge, 13.9% would like to learn new things and 9.1% would like to spend their free time doing something useful.

**Communication and further involvement: I wish to be informed about the progress of the project and I consent to the use of my personal data to receive informative emails about it.**

Unfortunately, only 17.6% of respondents would like to be informed about the progress of the project.

## 4.2 Primary (qualitative) research: The Focus Group / The Interviews

The Hungarian partners Minerva 90 and CTRIA tried to organise an online focus group meeting on several occasions, but unfortunately due to the busy schedule of the members it was not possible to find a common date. Therefore, as an alternative solution, as outlined in the guidelines, interviews were conducted with focus group members one by one. The majority of the interviews were conducted face-to-face and in one case a telephone interview was carried out.

Below is a summary of the information gathered during the interviews, based on the proposed questions.



**Q1: What are the most important changes that you observe in the world of tourism on a global scale?**

At global level, tourism is slowly returning to pre-COVID-19 trends. In the long term, experience shows that crises cannot break the exponential growth of tourism, but only cause a temporary decline. Overtourism is the biggest problem and tourist destinations will react to this with various methods such as limiting the number of tourists or closures. The role of sustainability will become even more important.

**Q2: What is the state of sustainable tourism in your country?**

In Hungary, overtourism is not such a pressing problem, and even if it is present, it is more likely to be associated with shorter periods. The bigger problem is the impact of climate change (lack of rain, low water levels in lakes) and the environmental destruction caused by investments in tourist areas. Sustainability is more an environmental issue.

**Q3: Which of these social sustainability actions should be considered a priority?**

For Hungary, the integration of migrants is not a priority, as their employment in the tourism sector is not very high. A bigger problem is the retention of young workers and the emigration of tourism workers, mainly to Austria. Another problem to be addressed is the issue of illegal employment in the tourism sector.

**Q4: Are you familiar with the term "regenerative tourism"?**

All of the interviewees had heard of the concept, but only three were able to define it precisely.

**Q5: Do you think it is a tourism practice that will be increasingly successful in the future? If so, what should a tourist destination do to implement it?**

Even the implementation of sustainable tourism in Hungary still faces challenges, and regenerative tourism is a concept that goes beyond this. In small local steps there are actions that can be linked to regenerative tourism (e.g. nature tours combined with litter picking). However, in the longer term, sustainability should be the goal, regeneration should perhaps be managed for local interests.

**Q6: Is the concept of sustainable tourism taught in regular (higher) education programs, in vocational training (VET) or in adult training in general?**

Education for sustainable tourism is not well represented in vocational training and adult education. In higher education, the subject is already part of the curriculum in some elements, but only marginally and not as a core element of education. One university is currently trying to specialise its training in this direction.

***Q7: Which institutions offer courses on sustainable tourism (Universities, VET providers, adult training institutions, private institutes/schools, etc)?***

Currently only the Pannon University is trying to do this.

***Q8: Does the provision of the training on sustainable tourism incorporate creativity and entrepreneurship skills?***

This topic is not really emphasized in this training, but some basic elements are included.

***Q9: Does the provision of the training on sustainable tourism incorporate digital skills?***

Only at a minimum basic skills level.

***Q10: Does the provision of the training on sustainable tourism incorporate resilient skills such as Leadership, Emotional Intelligence, Adaptability, Flexibility and Change Management, Communication and Collaboration, Idea Pitching, Becoming an Independent Learner, Inclusion and Diversity in the Workplace?***

Not at all.

***Q11: Do you believe that this type of projects can bring benefits to the tourism system of his country?***

Definitely yes.

***Q12: What would tourist places and destinations need today to improve inbound tourism?***

There is no need for quantitative improvement or growth, there is already overtourism. What is needed is qualitative improvements that point towards sustainability, both on the demand and supply side.

***Q13: What will be the most requested profiles in the tourism sector in the next five years?***

Direct customer service/customer care and Digital/IT were the most popular answers.

***Q14: What are the environmental issues that will condition the future of our society?***

Responses here were mixed, with respondents feeling that almost all of the things listed were important. What was clearly highlighted by all were the consumption responses "Knowledge of climate change" and "Ability to minimize use and maximize energy and water efficiency".

***Q15: Which digital skills, among the following, should be implemented to improve the competitiveness of tourism systems?***

The 3 most popular answers were "Online marketing and communication skills", "Desktop publishing skills (for designing brochures, catalogues, etc.)" and "Social media skills".

***Q16: What is the best approach that a project manager should have when performing their work?***

3 chose "Focused on user/customer satisfaction ('lean' approach)", 1 chose "Flexible and innovative, able to adapt quickly to change through multi-faceted strategies and targeted interventions ('agile' approach)", 2 chose "Holistic, i.e. combines some or all of the previous approaches ('hybrid' approach)".

***Q17: Do you know who the Hybrid Project Manager is? And what kind of work do they do?***

There were hints, but no one could define it, it needed further explanation.

***Q18: Do you know any training courses or University courses dealing with the subject of Hybrid Project Management?***

Nobody knew that.

***Best practices***

We did not receive a meaningful recommendation.

### 4.3 Secondary (qualitative) research: The Desk Research

During the implementation of the desk research, we took into account the areas in which we needed to search in order to find relevant information on the topic of the project. Basically, we looked for the state of sustainable tourism, educational opportunities in the field of tourism and the possible emergence of hybrid project management. In the field of desk research, the following main sources were reviewed:

- Tourism development documents.
- Education-related development documents.
- Tourism-related training in individual educational institutions.

#### TOURISM DEVELOPMENT DOCUMENTS

Perhaps the most useful information was extracted from these documents. Three documents were reviewed during the research. Firstly, the national strategy and secondly the development documents of the two largest tourist destinations.

#### *Tourism 2.0 - National Tourism Development Strategy 2030*

The document with national competence is the "Tourism 2.0 - National Tourism Development Strategy 2030" and its supplement "Tourism 2.0 Addendum". **It is currently the most important document defining tourism in Hungary.** Tourism 2.0 is the guideline for any further sub-sector or segment strategy, which should be developed in line with the Tourism 2.0 framework. This also means that future sub-sectoral strategies and regional development programmes, as well as specific, individual projects, must also be in line with the objectives of Tourism 2.0 and support its implementation.

This is the document where we found the most useful references during our desk research. Sustainability appears in several places in the strategy and is a key priority. It is one of the 12 main strategic directions identified in the strategy, on which the whole strategy is built. The most important criteria and activities related to sustainability are included in the strategy, even if not all of them are covered in detail. It is undeniable that sustainable tourism is an important value.

With regard to education training, both in the situation analysis and in the strategic orientations, the importance of education and its relevance to market needs is emphasised. These are assigned specific priorities and tasks. The issue of education in the sector is dealt with according to its weight. There is no reference to hybrid project management in the strategy, although it is perhaps not appropriate to go into such detail in a national strategy.

***At Home in Budapest - Integrated Urban Development Strategy (2021)***

Budapest is the most visited tourist destination in Hungary, but despite this, it does not have a valid, dedicated tourism development strategy. The Integrated Urban Development Strategy includes sustainable tourism as an objective to be achieved, but this section does not provide details on sustainability. This section expresses the need for Budapest to have a coherent tourism development strategy. It is clear from the above that education in the field of tourism is not mentioned in the document, nor is hybrid project management.

***Balaton Priority Area Development Programme (2021-2027)***

The Balaton Region is the second most visited tourist destination in Hungary after Budapest. However, the region does not have its own tourism development strategy. Nevertheless, its development programme for the period 2021-2027 has a substantial dedicated tourism chapter. In this chapter, sustainability is highlighted but not discussed in detail. The education chapter specifically mentions the need to develop tourism-related education in line with market needs, given the region's specificities. Hybrid project management does not appear anywhere in the document.

**EDUCATION-RELATED DEVELOPMENT DOCUMENTS**

The two most important strategy documents were reviewed in terms of reasoning. One is the "Public Education Strategy 2021-2030" and the other is the "A step change in higher education". The first document focuses on primary and secondary education, while the second focuses on higher education.

***Public Education Strategy 2021-2030***

The strategy aims to set out the basic directions for the development of public education as a public service until 2030. The document does not set out educational tasks and directions for tourism, but this cannot be blamed given its basic purpose.

The inclusion of sustainability is expected in such a document. The document does meet this expectation, although it cannot be said that sustainability and environmental protection are given high priority. However, in the section on 'Coordinated mental, spiritual and physical development of pupils', it is stated that when developing pupils' physical, spiritual and mental health, particular attention should be paid to environmental education, sustainability and the protection of the environment. This objective is also served by the decision to include the issue of education for sustainability among the teacher competences in the teacher certification procedure.





### ***A step change in higher education (Higher Education Strategy to 2030)***

The strategy aims to set the direction for Hungarian higher education up to 2030. Unfortunately, tourism is not mentioned anywhere in the strategy. The specific areas of intervention include 'medical, health and social training', 'science, technology and information technology training', 'economic training', 'agricultural training' and 'teacher training'. In the context of sustainability, the strategy states that reflection on environmental, economic and social challenges and sustainability will be integrated as a compulsory element in the curricula, both through regulatory and development interventions. That is all.

### **TOURISM-RELATED TRAINING IN INDIVIDUAL EDUCATIONAL INSTITUTIONS**

Tourism-related education is mostly provided at two levels in Hungary. There is at the secondary education level through technical schools, vocational schools and vocational colleges, and at the higher education level through bachelor and master programmes. At secondary level, classical professions related to the catering industry are trained, such as chef, waiter or pastry chef. These are irrelevant for the present project.

Higher education in tourism and hospitality is highly fragmented, with 17 institutions currently serving a declining number of bachelor's and master's students. However, there is no consistency between universities. The majority of bachelor's degrees are in tourism and hospitality, while master's degrees are in tourism management. However, the curricula taught are old-school and often do not include knowledge related to modern tourism or sustainable tourism.

### **BEST PRACTICES**

Based on our research and consultations, the field of sustainable tourism and its specific knowledge base is not yet well known in Hungary in general. Of course, the term sustainability appears more and more in the context of tourism, but in many cases, it is more of a buzzword. In many cases, the underlying content and substantive knowledge is not explained and remains in the background.

The above shows that it is not easy to find a good practice related to this project in Hungary. Below, we would like to present two best practices that are perhaps the closest to what is expected. One is project-based and the other is related to higher education.

***Best practice no.1: Online HUB and e-learning curriculum on circular, sustainable tourism for tourism operators in off-beat destinations. RE-CONNECT project.***

The RE\_CONNECT project is an ongoing Erasmus+ funded project. It involves 6 partners from 5 countries. RE-CONNECT aims to accelerate the competence and skill development of community-based tourism in offbeat destinations by implementing a greener and more digital development approach to assure more sustainable tourism along circular tourism approach.

Within the project a collaborative online hub has been developed that provides skill and competence development in community-based circular tourism. The hub can successfully support to develop tourism and economic potential of offbeat destination areas, through having all needed elements for the competence development for the target groups. In addition to containing good practices and knowledge material related to sustainable tourism, the HUB has many interactive features. On the one hand, it can function as a community forum where people can chat just like on social media sites; they can create closed project groups where they can work on joint projects using a project management module; they can have their project ideas evaluated from a sustainability perspective by answering 10 simple questions using an interactive project idea evaluation function.

Besides the online HUB, the other main outcome of the project is an e-learning curriculum with modules on circular, sustainable tourism. The curriculum is not university level, easy to absorb, rather it is more of an awareness-raising one. Each module contains a theoretical overview, available good practices, recommended literature and extra information, as well as practical exercises called action items. At the end of each module, a test is completed and at the end of the whole course, after passing a final test, students receive a downloadable certificate. The following modules are included in the curriculum, which is not exhaustive: „Product life extension“, „Sustainable tourism offers“, „Sustainable mobility“, „Sustainable stay and services“, „Digital Solutions for Circular Tourism“, „Community based tourism development of offbeat destinations“ etc.

More information: <http://reconnecthub.eu>

This good practice does not provide the level of knowledge that can be expected within the framework of this project, but the methodology and the topic are forward-looking, especially considering the Hungarian circumstances in this field.

### ***Best practice no.2: Sustainable and Circular Economy-Based Tourism BSc, Pannon University***

As explained above, there is not much modern training in Hungarian higher education related to sustainable tourism. This is something that the University of Pannonia hopes to change, with the launch of the "Sustainable and Circular Economy-Based Tourism BSc" course from September 2023. We are very confident that the training will be successful and that other universities will follow this example.

The aim of the training is to train professionals for the tourism sector who have a deep understanding of the operation of circular economy beyond the basic knowledge of tourism; they are able to design and operate the stakeholders, profit-oriented and non-profit organizations of the sector with methods based on a circular approach, all in regional and destination logic, based on a system approach, on the basis of near-natural tourism.

Duration of Study: 8 semesters.

The training course itself is a curiosity in Hungary. The subjects taught in the classical school, such as microeconomics, macroeconomics, basics of accounting, statistics, business law or corporate finance, have been retained. However, these subjects have been supplemented by subjects related to the modern approach to tourism. Without being exhaustive, these are: basics of circular economy, introduction to sustainable tourism, nature-based tourist attractions, sustainability in marketing, economics of sustainability or sustainable communities, change of approach etc. The training course contains a 2 semesters length of internship as well.

The training curriculum is available here:

<https://www.uni-pen.hu/files/dokumentumok/tantervek/fkt.pdf>

These are extremely long-awaited and justified changes, which will hopefully result in a workforce of professionals in the tourism sector that can meet today's expectations and trends.

## **5. Conclusions and Recommendations**

### **CONCLUSIONS OF THE QUESTIONNAIRE**

Among the underlying motivations for environmental and social sustainability, improving efficiency is the main motivating factor, but the desire to satisfy customers is also present.

From a social point of view, the situation of young people is the problem that needs to be solved the most. This is a perfectly understandable point of view, given that the sector is suffering from a significant emigration of young workers. The situation of migrants is the least important issue, which can be explained by two aspects. Firstly, their employment in the tourism sector is minimal. On the other hand, the prevailing anti-migration public mood in the country reinforces this trend.

From an environmental point of view, energy and water use and waste management are the most important issues. Indeed, from a tourism point of view, these are the two areas that most concern stakeholders. The eclipsing of biodiversity, however, is a concern. This is both because the concept is probably not well understood and because tourism investment is having a major impact on (and is currently destroying) this very important area.

In terms of skills and competences, respondents stressed the importance of customer focus and flexibility, while, surprisingly, digital skills were not considered as important. When talking specifically about digital skills, marketing-related areas such as online marketing, website development or social media skills are perceived as important. They would like to improve leadership skills, communication and flexibility, while more important skills related to project management, such as critical thinking or data analysis, do not seem to be important to them.

There are huge gaps in the field of project management. A significant proportion of respondents are not familiar with the different methods and processes, have not received training in this area in their lives, and do not have a dedicated position in their organisation. Obviously, in the course of their work, even if not consciously, some project management activities have to be carried out. These have taught him certain aspects of time and cost management and certain elements of the traditional project approach. However, the majority of respondents would find such training useful and would be interested in it. There is no consensus on the form of training (online, face-to-face, etc.).

Feedback from respondents indicated that the questionnaire was not easy to understand and complete.

## CONCLUSIONS OF THE INTERVIEWS

At a global level, the focus group members believe that despite crises that may bring temporary setbacks, over-tourism will continue to be a feature. For Hungary, over-tourism is perceived as less of a threat than the effects of climate change and the destruction of nature that is taking place in the country. The biggest challenge for Hungary is to address labour shortages and the migration of young workers abroad. The issue of sustainability is seen as a dominant one at both global and national level. Regenerative tourism is considered to be a forward-looking idea, but at the moment the implementation of sustainable tourism is also quite challenging, so it is not considered to be very relevant at the moment.

In the field of education, sustainability is not present in vocational and adult education. In higher education it is already part of the curricula, but very marginally. Only one university in Hungary plans to launch a specific sustainable circular tourism course this year. On the one hand, this is to be welcomed, according to the focus group members, and on the other hand, it should not be a separate course but integrated into existing courses. In addition to the sustainability aspects, tourism education is severely lacking in entrepreneurship and project management skills. Training in digital skills is also poor. According to interviewees, online marketing, social media skills and desktop publishing skills are the most important in this profession.

Hybrid project management is not a well-known concept, but after explaining the concept, interviewees felt that it would be useful to have a workforce with such skills in the tourism sector.

## **CONCLUSIONS OF THE DESK RESEARCH**

Desk research was ahead of questionnaire research and focus group interviews. The research was confronted with the fact that very few development documents are available in the field of tourism. Mostly the nationally regulating Tourism 2.0, which is relevant. In this, sustainability is presented as a strategic direction, which is definitely a positive thing. Apart from this document, the largest tourist destinations do not have a dedicated tourism development strategy.

Tourism is not mentioned anywhere in the most relevant national strategies in the field of education. Sustainability is already included in the documents, but it is only mentioned as an obligatory concept to meet the requirements of the spirit of the age, and is not developed in detail. In addition to this, higher education in tourism and hospitality is highly fragmented. Unfortunately, there is a lack of coordination between universities. The curricula taught are old-fashioned and often do not include knowledge related to modern tourism or sustainable tourism. There is only one tentative university that wants to teach tourism in a modern format from this year.

## **FINAL CONCLUSIONS AND RECOMMENDATIONS**

Based on the information gathered through various methods, it can be said that in Hungary tourism is not necessarily given the importance it deserves, neither in development documents nor in education. Sustainability is not an unfamiliar concept, it can be found in many places, but in most cases as a mandatory element without any underlying content. In higher education, tourism is an established subject in many institutions, but the number of students is decreasing and the curriculum is not up to modern standards. The management approach is completely absent from both education and the practical implementation of tourism. In this light, the sustainable, hybrid project management profile and the educational background required for this are urgently needed. In terms of implementation, it is proposed that great emphasis should be placed on promotion and awareness-raising in the field, because without it many people will not recognise the need for this knowledge.



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## Anexo F. Relatório nacional da Itália

## Annex F. National Report of Italy



### WP2 Labour Market Needs Analysis and Development of a New Job Profile Certification

#### T2.2. Identification of Labour Market Needs

##### National Report - Italy



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## **1. Executive Summary**

The approach to the theme -analysis of the needs of the tourism market according to the positioning of the Hybrid Project Manager- involved the realisation of:

- a) a quantitative analysis, carried out through an online survey;
- b) a qualitative analysis, conducted through a focus group (integrated by interviews) and desk research.

The needs analysis has helped to better define the profile of the Hybrid Project Manager and to understand how this new professional figure can operate effectively in the tourism system.

A need for transversal and flexible skills has emerged, a function that can be well performed by the Hybrid Project Manager. However, the profile of the new manager is not yet fully understood by those working in the tourism world and therefore a strategy must be implemented that makes it easier to match supply and demand.

## **2. Introduction**

The National Report is one of the documents produced within the Task WP2/T2.2 'Identification of Labour Market Needs'. As expected by the project, each responsible partner will develop a report, covering all the aspects of the training, including the program, evaluation results and recommendations. The lead partner will compile the national reports and produce a final one.

Each report can offer, in a synthetic way, a vision of the national dynamics concerning the trend of tourism, the economic-social system and the labour market in the tourism sector. And above all, it can help to understand how the Hybrid Project Manager profile can effectively meet the needs of an ever-changing economic sector.

The activities were carried out in cooperation with CESIE (project partner).

## **3. Methodology**

The methodology followed was the one proposed by the consortium (as mentioned in the guidelines given).

## **4. Results and Discussion**

### **4.1 Primary (qualitative) research: The Questionnaire**

### Some technical information regarding the survey

The questionnaire was disseminated online through the mailing of ConfesercentiPA and the network of contacts of CESIE and team members.

The survey followed a cross-sectional design, that is, it provided us with a snapshot of the phenomenon at a particular moment. Consequently, it was organized and conducted in an exploratory/descriptive form.

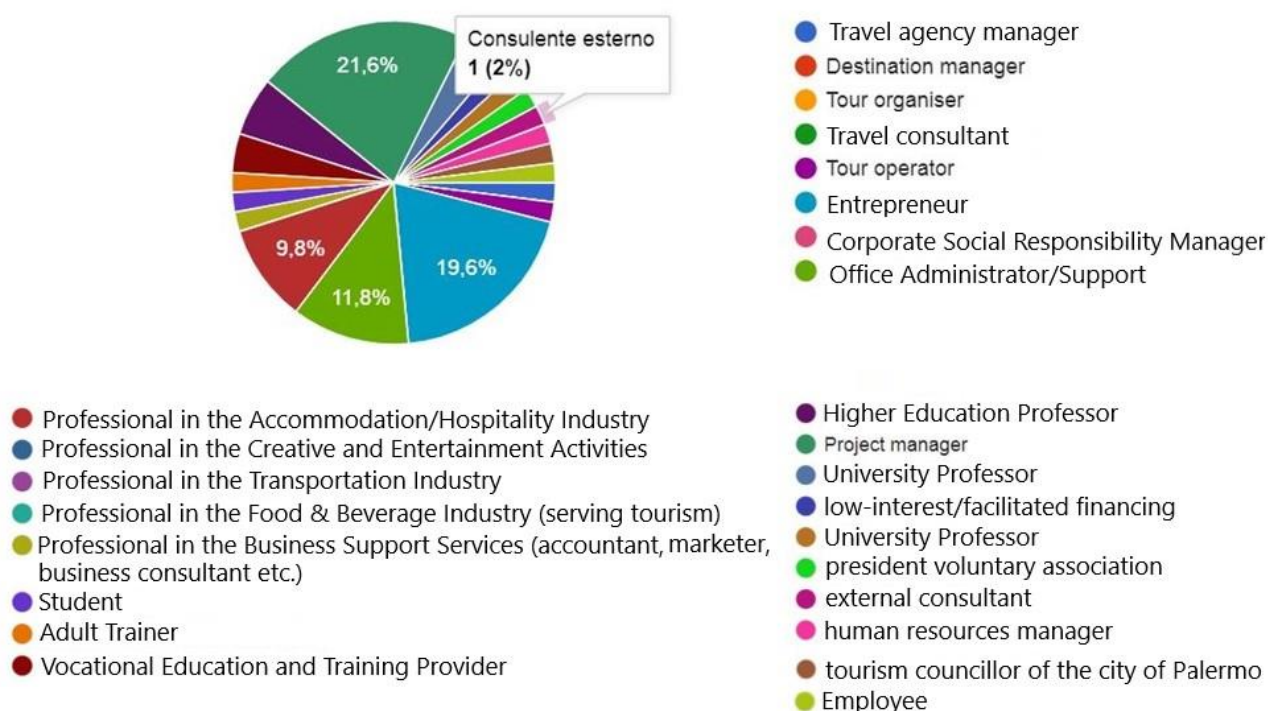
### Sample composition, profile of the interviewees, tools used for the distribution of the questionnaires, number of questionnaires administered and completed

The sample used was a stratified random sample. Stratified sampling has made it possible to obtain relevant information from strata or categories of individuals particularly suited to the sampling process.

In fact, the questionnaire was sent to some categories of professionals in the tourism sector: tour operators, university professors, industry experts, communication managers, DMO public officials, etc.

The questionnaires were distributed to hundreds of stakeholders; once the threshold of 51 respondents was reached, the survey was interrupted.

**Figure 1: Results from question "Which of the following describes best your current job/role?"**



## The results of the survey (summary)

### ***About the tourism macro-environment (sustainability, skills, training in the tourism systems):***

The survey shows a considerable sensitivity towards sustainability, which should be guaranteed first of all with actions of climate change mitigation. Organizations and companies that invest in sustainability obtain benefits in terms of growth opportunities and strengthening of corporate values. The actions of a sustainable nature that should be implemented to improve tourism systems are: the development of skills, greater involvement of the communities, the use of less polluting means of transport, the reduction of electricity and water consumption. Both in terms of digital and business skills, the area that should be strengthened is that of marketing. Training is preferred face-to-face and on-the-job. In any case, the demand for training is considerable (also in the field of project management).

### ***About the profile of the Hybrid Project Manager:***

The concept of flexibility is well integrated in the organizations of the respondents. As a result, in the respondents' organizations the approach to project management is mainly agile; following the preferred model is the traditional one and, shortly after, the hybrid one. It could be argued that the hybrid model is not yet fully known by the tourism sector, even if its potential is perceived. Even if typical project management activities are carried out within the organizations, certifications are few.

## 4.2 Primary (qualitative) research: The Focus Group / The Interviews

### Some technical information regarding the focus group

The focus group was conducted with 4 guests, two moderators and two observers.

***Table 1: The profiles of the interviewees***

Project manager, with experience in theatre, organization of cultural events, tourism, and sustainable tourism
Tourism manager, with specific focus in hotel management and tour organization, with a background in EU project management
University Professor (Palermo University), expert in the tourism sector
Expert in the tourism sector, with experience also in the trade union field

The discussion has been conducted using a PPT presentation created to summarize the key points. In doing so, participants were invited to answer questions related to the three basic thematic areas.

Furthermore, on two different dates, two individual interviews were carried out, both assisted by a moderator and an observer.

**Table 2: The profiles of the interviewees**

University Professor (Messina University), expert in the tourism sector
Project manager, President of a cultural itinerary declared by the Council of Europe, with a background in EU project management

Also, in this case the interviews were conducted using the PPT presentation and with the outline of the three thematic areas.

Both the focus group and the interviews were carried out following the guidelines indicated in the Methodological Introduction and in the Excel file prepared by ConfesercentiPA at the beginning of the activities.

### **The results of the focus group/interviewees (summary)**

#### ***About the tourism macro-environment (sustainability, skills, training in the tourism systems)***

There is increasing attention on issues relating to sustainability, also following the Covid-19 pandemic. In fact, some reference is made to the importance of both environmental certifications such as Ecolabel and EMAS and to the best relationship with local communities and territories through experiential tourism. The other emerging paradigm is that of digitization. There has been a return to "official" channels for organizing the tourist experience, with a difficulty in finding suitable professional figures.

There is a change in tourism which concerns the competitive function of territories to present themselves at an international level. But to do this, the focus must be shifted from the company to the system. However, this sensitivity is still underdeveloped at the local level. The importance of regenerative tourism is underlined: involving residents in the construction of the product is the first element to ensure the quality of the tourist offer.



With regard to training, there is no University courses dedicated exclusively to sustainable tourism; however, sustainability is discussed in many courses focused on tourism, given the centrality of the topic. A master's degree for tourism sustainability managers, which can already qualify for the profession, would be useful. Upgrading the workforce is considered important.

### ***About the profile of the Hybrid Project Manager***

The hybrid profile promoted by the project appears effective above all for larger companies to support reporting and other obligations, which are already a mandatory task for companies of a certain size. The holistic approach is certainly interesting but also the more unpredictable one, because there is not yet a precise scheme to apply but a model to adapt based on changes.

### ***Best practices***

The best practices proposed by the interviewees were:

1. Pierfilippo Spoto and Monti Sicani: <https://pierfilippospoto.wordpress.com/>
2. Moltivolti: <https://www.esperienzeconilsud.it/moltivolticomunity/2021/04/04/attraverso-i-miei-occhi-diventa-mediatore-territoriale-con-moltivolti/>
3. TOURISME project (COSME): sustainable tourism training for hoteliers and tour operators: <https://tourisme-project.eu/>
4. The Ecomuseums, for example those of the Langhe area: <https://www.ecomuseodellerocche.it/it/>
5. CAST - Center for Advanced Studies in Tourism: <https://corsi.unibo.it/2cycle/team/team-lab>

**Keywords:** territorial development, storytelling, complexity, experience, integrated approach, flexibility, customer satisfaction.

## **4.3 Secondary (qualitative) research: The Desk Research**

### **Some technical information regarding the desktop research**

The research was conducted following two paths:

- The first was based on the analysis of four strategic documents mainly concerning sustainability and corporate organization, the labour market and tourism skills, and the project management profile.

The analysed documents were prepared by government bodies (ANPAL), by trade associations (Unioncamere, EBNT) and by international market research and analysis

bodies (Deloitte, KPMG). The territorial coverage is national, and the typology of the documents is of a technical nature (reports).

- The other path envisaged the analysis of some documents and online sites in a way that help to provide an overall picture of the topics considered useful for the purposes of the research.

This part focused on:

- the National Recovery and Resilience Plan (PNRR);
- the new specialist training courses dedicated to managerial profiles working in tourism sector;
- some good practices.

### **Some technical information regarding the desk research**

The result of the desk research is complex but some conclusions can be drawn from it.

From the first path of analysis it emerges that the crises have changed consumption models in tourism, increasing the interest of the demand towards the issues of sustainability and ethical behavior (climate change, regenerative tourism, etc.). The changes in tourism practices have been facilitated by the rapid progress of technology and by new means of communication. The development of digital tools has introduced new elements in social relationships and business processes. Society, both from the point of view of production and from that of consumption, is therefore projected towards the green and digital transition.

Unfortunately, the training system does not seem to have fully adapted to the changes. In fact, training at various levels does not seem to have focused on these emerging issues to prepare highly specialized managers and operators but has dealt with them in a transversal and all-embracing way.

The changes have also been evident in the industrial sector, with the entry of Manufacturing 4.0. In this environment, a hybrid and holistic management model is having success. But, in this case, the progress is more structured and is more easily assimilated by the organizational system. In practice, the changes underway in the production and project management system have given rise to new organizational behaviours in the corporate culture. So, the system responds appropriately to the changes.

But the application of these new hybrid management models to the world of tourism is not automatic. While the profile of the Hybrid Project Manager is already established in many sectors (IT, manufacturing, etc.), applications in the field of tourism are still to be developed.

The stakeholders of the sector show interest and curiosity but, first of all, a communication and training strategy must be defined to be sure that the Hybrid Project Manager can have an optimal placement within the tourism system.

In the second part of the research the vision of the socio-economic context was further explored.

Overall, the tourism industry has been deeply affected by Covid-19 pandemic in the last few years, in terms of job losses and lack of adequate skills to keep up with the emerging trends and needs of the tourism market. However, it is possible to highlight that more and more specialist training courses to upskill professionals in tourism industry have been developing, due to a major awareness of the need of job profiles, equipped with the skills of the Hybrid Project Manager. Even if the profile of Hybrid Project Manager does not exist in Italy, it is relevant to outline that there is a certain awareness of the vital importance of the professional requirements and needs that the HPM can ensure. In any case, the post-covid tourism will necessarily have to combine management practices together with a holistic approach.

From this point of view, it would be desirable for the future to encourage entrepreneurial projects, based on creativity, innovation, and sustainability, that proved to be the key elements of successful elements in the tourism industry, due to the high possibility of changes and inconveniences it is exposed to (e.g., different trends or pandemic), and need of being competitive.

### **Best practices**

A best practice has been identified in the Alter-native energies festival, launched in Gibellina, Sicily, in 2007 with the idea of creating an innovative event to be held every year in Sicily in unique venues (e.g., archaeological sites such as the Cuma Archaeological Park, Pozzuoli, and wind farms<sup>1</sup>).

The mission of the festival was to create a community of artists, companies, public bodies, and citizens that gather to promote the applications of renewable energies and sustainability, and that they could express their alter-nativeness.

The Alter-native energies festival promotes talk-show meetings to raise awareness on renewable energies, workshops for schools, fashion shows with recycled clothes, concerts and theatre and dance performances representing the relationship between humans and the renewable energies.

The Alter-native energies festival can be considered as a good practice, as through art (dance and theatre performances), it promotes alternative ways of discovering the cultural and archaeological heritage of Italy. To achieve this goal, the approach that has been deployed is holistic, as several cultural centres, environmental associations, cities and regions, companies

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<sup>1</sup> For further information, visit the official website or its Facebook page: [https://festivalenergiealter-native.eu/?page\\_id=227](https://festivalenergiealter-native.eu/?page_id=227) and <https://it-it.facebook.com/Festivalenergiealternativa/>

and artists gather in the name of sustainability and promotion of renewable energies. In such context, the typical skills of project management, such as analysing, planning, coordinating, creating, and managing, are required in the organizational process, as well as in the implementation phase.

A second best practice was suggested by one of the focus group participants. It concerns the experience of ecomuseums in Italy, and in particular that of the *Rocche del Roero Ecomuseum*<sup>2</sup>. In the UNESCO definition, borrowed from Georges Henri Rivière, the ecomuseum is declared as

«an instrument conceived, fashioned and operated jointly by a public authority and a local population. The public authority's involvement is through the experts, facilities and resources it provides; the local population's involvement depends on its aspirations, knowledge and individual approach» (Rivière, 1985, p. 182)<sup>3</sup>.

Keywords: green and digital transition, higher training, resilience, European funds, creativity, innovation

## 5. Conclusions and Recommendations

The activities foreseen by WP2 Labour Market Needs Analysis and Development of a New Job Profile Certification, T2.2. Identification of Labour Market Needs were the following:

- a) a survey conducted through the online administration of a questionnaire, with 51 respondent;
- b) a focus group with 4 participants, integrated with 2 individual interviews;
- c) a desk research developed following two analysis paths: one with the study of four strategic documents, the other with an in-depth analysis of the National Recovery and Resilience Plan (PNRR) and some websites about new specialist training courses dedicated to managerial profiles working in tourism sector.

The analysis work was completed with the identification of some best practices, partly suggested by the focus group participants, and one that emerged during the desk research. The needs analysis has made it possible to focus attention on some points that need some reflection.

<sup>2</sup> For further information, visit the official website <https://www.ecomuseodellerocche.it/en/>

<sup>3</sup> Rivière, G. H. (1985), *Museum*, XXXVII, 4, pp. 182-184, in UNESCO, *The Ecomuseum: an evolutive definition*, URL <https://unesdoc.unesco.org/ark:/48223/pf0000068366> , last access 28/04/2023



The first fact to underline concerns the profound changes that society is experiencing both from the point of view of the production of goods and services (including tourist ones) and from that of their consumption.

The changes have been accelerated by the crises (the first economic, the second health and the third geopolitical), events that have forced society to review its priorities and growth objectives. The transformation of production and consumption models have above all transformed the world of tourism, which has been particularly affected by the crises as evidenced by the loss of hundreds of millions of jobs.

Two themes have become priorities, also in the tourism sector: the search for greater sustainability and the use of intelligent systems for the production/use of goods and services (especially with reference to the digitization of connections). However, these changes are affecting education more slowly.

In the university sector, for example, there are very few specialist courses centred on sustainable tourism, despite the fact that tourism generates over 6% of direct added value in Italy.

The smartization of social practices also affects industrial production processes. New figures are entering the labour market and project management is changing its philosophy, giving greater value to the principles of elasticity and flexibility.

The managerial figures who embody these skills are today considered very important by the stakeholders of the industrial and IT sector. The profile of the Hybrid Manager appears particularly competitive because he guarantees a holistic and flexible approach to the actual challenges.

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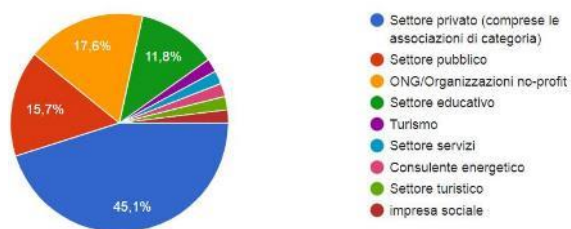
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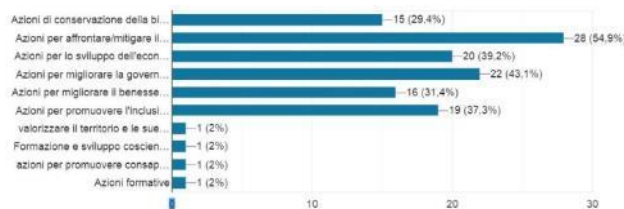
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## 7. Appendix 1: Survey Results

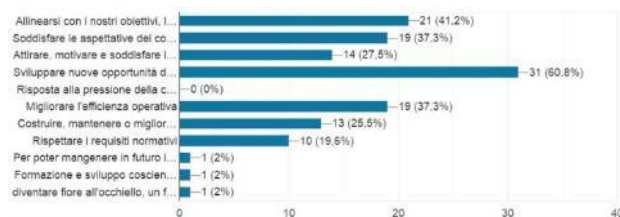
Please indicate the sector in which you work



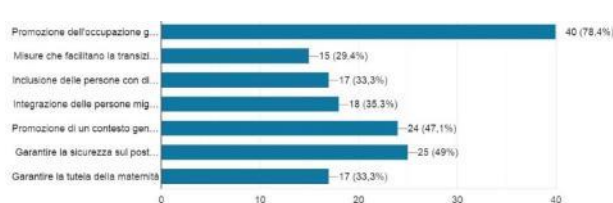
1. What concrete actions should your organization implement to make tourism practices more sustainable?



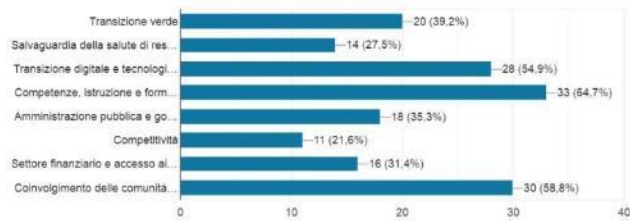
2. Which of the following social sustainability actions should be considered a priority?



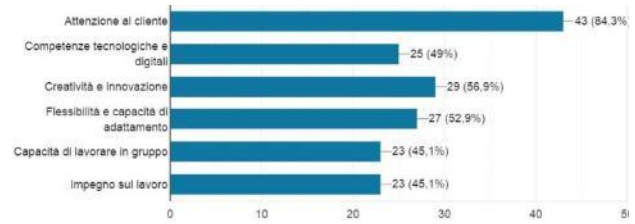
3. Which of the following social sustainability actions should be considered a priority?



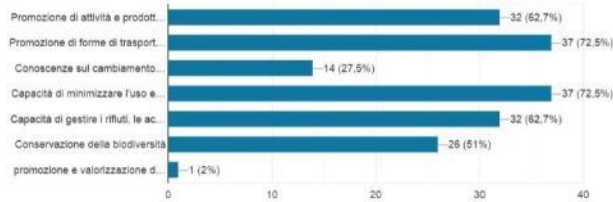
4. Which of the following actions/measures should be implemented to revitalize the tourism sector?



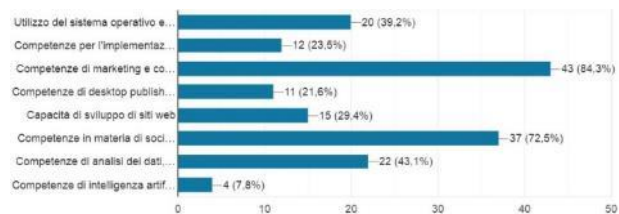
5. Which of the following skills and abilities are the most important for people who want to work in the tourism sector?



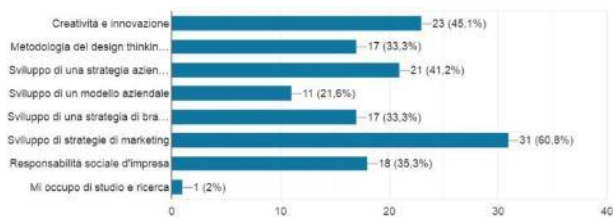
6. Which of the following environmental skills should be implemented to improve the competitiveness of tourism systems?



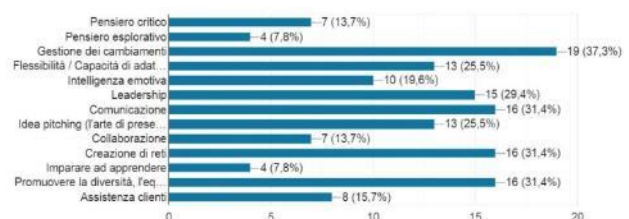
7. Which of the following digital skills should be implemented to improve the competitiveness of tourism systems?



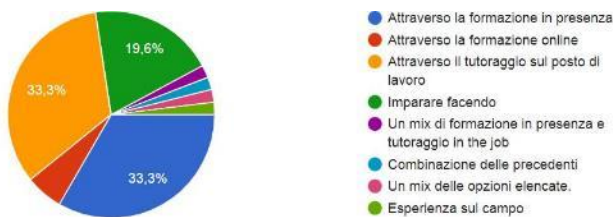
8. In which of the following areas of entrepreneurship would you like to improve your skills?



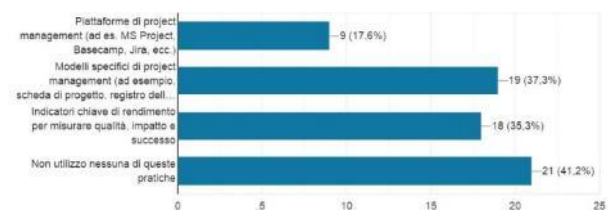
9. Which of the following soft skills do you think you need to improve?



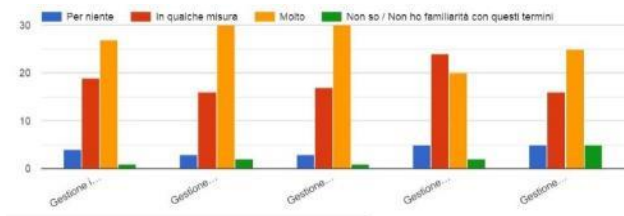
10. What is the most effective form for training a tourism professional?



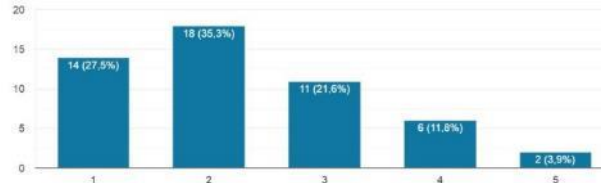
11. Which of the following practices do you use to perform your daily tasks?



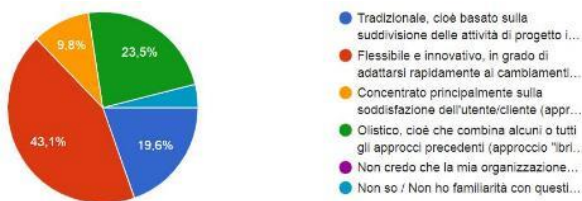
12. Please indicate the extent to which you use the following processes to implement your projects and/or perform your daily tasks



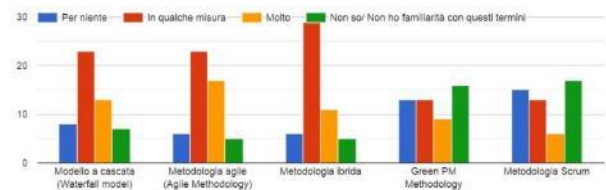
13. Do you think it is more beneficial for a tourism business to be flexible, manage change and follow the market than to apply medium-long term planning?



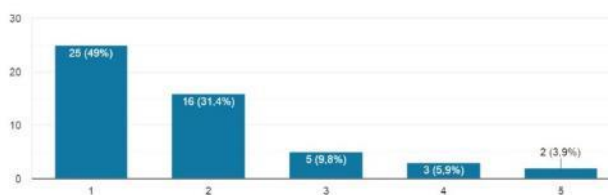
14. In your organization the approach to project management (i.e. the use of specific knowledge, skills, tools and techniques to deliver something of value to people) is:



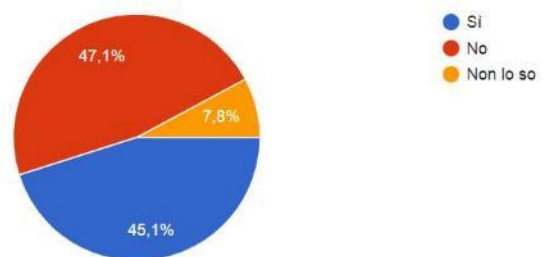
15. Please indicate whether and to what extent your organization uses the following project management methodologies when implementing projects/day-to-day operations:



16. In your opinion, can a hybrid project manager, able to implement planning effectively but also to adapt quickly to changes, be considered a competitive resource for tourism businesses and public bodies responsible for tourism policies?

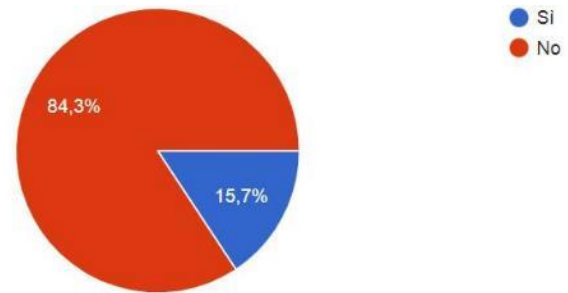
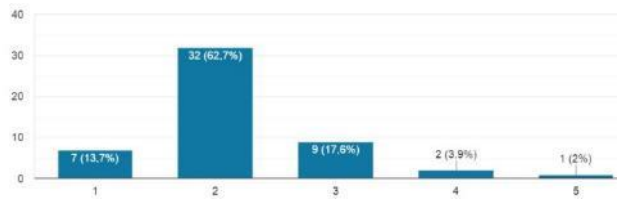


17. Does your organisation include in its organizational chart an official job position entitled "Project Manager"?

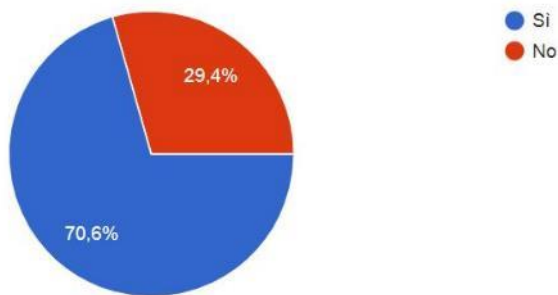


18. Please indicate you agree with the following statement:

19. Do you have any certification in project management?



20. Would you be interested in attending a free training course entitled “Sustainable Hybrid Project Management for the Tourism Sector”?



21. If yes, please specify why:



## 8. Appendix 2: Data Analysis

### Primary (quantitative) research: The Questionnaire

**Table 1: Data Analysis of the Questionnaires**

Sample description		Survey Results	
<b>Analysis of data collected through questionnaires</b>	The questionnaire was disseminated online through the mailing of ConfesercentiPA and the network of contacts of CESIE and team members.	About the value of sustainability in tourism. About the tourism labour market, skills and trainings in the tourism sector	<p>The survey shows a considerable sensitivity towards sustainability, which should be guaranteed first of all with actions of climate change mitigation.</p> <p>Organizations and companies that invest in sustainability obtain benefits in terms of growth opportunities and strengthening of corporate values. The actions of a sustainable nature that should be implemented to improve tourism systems are: the development of skills, greater involvement of the communities, the use of less polluting means of transport, the reduction of electricity and water consumption. Both in terms of digital and business skills, the area that should be strengthened is that of marketing. Training is preferred face-to-face and on-the-job. In any case, the demand for training is considerable (also in the field of project management).</p>
	The questionnaires were distributed to hundreds of stakeholders; once the threshold of 51 respondents was reached, the survey was interrupted.	About the Hybrid Project Management profile.	<p>The concept of flexibility is well integrated in the organizations of the respondents. As a result, in the respondents' organizations the approach to project management is mainly agile; following the preferred model is the traditional one and, shortly after, the hybrid one. It could be argued that the hybrid model is not yet fully known by the tourism sector, even if its potential is perceived.</p> <p>Even if typical project management activities are carried out within the organizations, certifications are few.</p>
		Final considerations.	From the questionnaires emerge an attention and a predisposition towards the emerging themes of tourism production and consumption: sustainability, widespread well-being, digitization, innovation. The innovative and flexible approach to management is also highly appreciated. But the functions of the Hybrid Project Manager are not yet well known. Anyway, the potential is understood, and this stimulates us to deepen the application possibilities.

## Primary (qualitative) research: The Focus Group / The Interviews

**Table 2: Data Analysis of the Focus Group / The Interviews**

Sample and method description		Survey Results	
<b>Analysis of data collected through focus groups and interviews</b>	<p>The focus group was conducted with 4 guests, two moderators and two observers.</p> <p>Furthermore, on two different dates, two individual interviews were carried out, both assisted by a moderator and an observer.</p>	<p>About the value of sustainability in tourism. About the tourism labour market, skills, and trainings in the tourism sector.</p>	<p>There is increasing attention on issues relating to sustainability, also following the Covid-19 pandemic. In fact, some reference is made to the importance of both environmental certifications such as Ecolabel and EMAS and to the best relationship with local communities and territories through experiential tourism. The other emerging paradigm is that of digitization.</p> <p>There is a change in tourism which concerns the competitive function of territories to present themselves at an international level. But to do this, the focus must be shifted from the company to the system. However, this sensitivity is still underdeveloped at the local level.</p> <p>The importance of regenerative tourism is underlined: involving residents in the construction of the product is the first element to ensure the quality of the tourist offer.</p> <p>With regard to training, there is no University courses dedicated exclusively to sustainable tourism; however, sustainability is discussed in many courses focused on tourism, given the centrality of the topic. A master's degree for tourism sustainability managers, which can already qualify for the profession, would be useful.</p>
		<p>About the Hybrid Project Management profile.</p>	<p>The hybrid profile promoted by the project appears effective above all for larger companies to support reporting and other obligations, which are already a mandatory task for companies of a certain size. The holistic approach is certainly the interesting but also more unpredictable one, because there is not yet a precise scheme to apply but a model to adapt based on changes.</p>
		<p>Final considerations.</p>	<p>Also in this case, the participants show interest and familiarity with the topics that characterize today's tourism in the light of the changes that society is experiencing.</p> <p>The figure of the Hybrid Project Manager is clearer thanks also to the explanation given by the moderators. The hybrid approach to management is appreciated and also in this case it is advisable to work towards a diffusion of the skills of this figure.</p>



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The documents consulted for the desk research were the following:

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 URL [https://www.anpal.gov.it/documents/552016/586456/report\\_previsivo\\_Excelsior\\_2022-%2026.pdf/33487145-b93d-8594-46be-f65b1f26b75d?t=1644593762030](https://www.anpal.gov.it/documents/552016/586456/report_previsivo_Excelsior_2022-%2026.pdf/33487145-b93d-8594-46be-f65b1f26b75d?t=1644593762030)  
 Last access: 30/3/2023

These are documents prepared by government bodies (ANPAL), by trade associations (Unioncamere, EBNT) and by international market research and analysis bodies (Deloitte, KPMG). The territorial coverage is national, and the type of documents is of a technical nature (reports).

Two tables have been inserted below: the first provides some synthetic information on the documents, the second illustrates in more detail -but always synthetically- the contents of the documents and some concluding considerations.



### Some considerations about the four documents

The analysis of the four documents reveals some trends.

The crises have changed consumption models in tourism, increasing the interest of the demand towards the issues of sustainability and ethical behaviour (climate change, regenerative tourism, etc.).

The changes in tourism practices have been facilitated by the rapid progress of technology and by new means of communication. The development of digital tools has introduced new elements in social relationships and business processes. Society, both from the point of view of production and from that of consumption, is therefore projected towards the green and digital transition.

Unfortunately, the training system does not seem to have fully adapted to the changes. In fact, training at various levels does not seem to have focused on these emerging issues to prepare highly specialized managers and operators but has dealt with them in a transversal and all-embracing way.

The changes have also been evident in the industrial sector, with the entry of Manufacturing 4.0. In this environment, a hybrid and holistic management model is having success.

But, in this case, the progress is more structured and is more easily assimilated by the organizational system. In practice, the changes underway in the production and project management system have given rise to new organizational behaviours in the corporate culture. So, the system responds appropriately to the changes.

But the application of these new hybrid management models to the world of tourism is not automatic. While the profile of the Hybrid Project Manager is already established in many sectors (IT, manufacturing, etc.), applications in the field of tourism are still to be developed. The stakeholders of the sector show interest and curiosity but, first of all, a communication and training strategy must be defined to be sure that the Hybrid Project Manager can have an optimal placement within the tourism system.

**Table 3: Considerations based on the Documents used**

References	Translation in English	Type of Source	Territorial Scale	Type of Document
<b>UNIONCAMERE, AGENZIA NAZIONALE POLITICHE ATTIVE DEL LAVORO (ANPAL) (2022),</b> <i>Previsioni dei fabbisogni occupazionali e professionali in Italia a medio termine (2022-2026)</i>	<i>Forecasts of occupational and professional needs in Italy in the medium term (2022-2026)</i>	UNIONCAMERE: NGO ANPAL: Governative Agency	National	Technical report



References	Translation in English	Type of Source	Territorial Scale	Type of Document
<b>ENTE BILATERALE NAZIONALE TURISMO (EBNT) (2022), <i>La sfida della riqualificazione professionale dei lavoratori nel settore turistico/ricettivo nell'epoca del 4.0</i></b>	<i>The challenge of professional upgrading of workers in the tourism/hospitality sector in the era of 4.0</i>	EBNT: NGO	National	Technical report
<b>DELOITTE ITALIA (2022), <i>Obiettivo sostenibilità. Nuove traiettorie di sviluppo per il turismo italiano</i></b>	<i>Sustainability goal. New development trajectories for Italian tourism</i>	DELOITTE ITALIA: Research Institution	National	Technical report
<b>KPMG (2018), <i>Hybrid IT at scale. Come implementare un modello operativo IT di nuova generazione</i></b>	<i>IT at scale. How to implement a next generation IT operating model</i>	KPMG: Research Institution	International/ National	Technical report



**Table 4: Topic Areas of Sources Analysis**

References	Source	Key Trends	Actions to take	Emerging themes	Final Considerations
<b>UNIONCAMERE, AGENZIA NAZIONALE POLITICHE ATTIVE DEL LAVORO (ANPAL) (2022),</b> <i>Previsioni dei fabbisogni occupazionali e professionali in Italia a medio termine (2022-2026)</i>	About the value of sustainability in tourism	Green transition processes will continue to play an important role in the market of work. Green skills will be in demand more and more widely: in the next 5 years, companies and the public sector will require the possession of aptitude for energy saving and environmental sustainability to 2.4 million employed and for 60% of these this competence will be required at a high level.	N.S.	The green transition will stimulate demand for graduates with skills in the fields of energy saving and environmental sustainability	<p>The most important skills in the current phase are soft (transversal) skills (cognitive, social skills, etc.) and technical skills.</p> <p>The recovery of the tourism sector suggests that in the short to medium term it will be necessary to place a very large number of workers on the market.</p> <p>The most requested managerial figures on the market are those connected to the digital and green transition.</p>
	About the tourism labour market, skills and trainings in the tourism sector	<p>Three major megatrends are emerging: digital transition, environmental transition, and demographic transition (population ageing). All these transitions will lead to a significant change in the skills and competences required on the labour market. Soft (transversal) skills (cognitive, social skills, etc.) and technical skills will become increasingly important. At the same time, the specific skills linked to the transitions mentioned above will become increasingly widespread and central.</p> <p>It is estimated that between 2022 and 2026 the Italian labour market may need a total of 4.1-4.6 million employed depending on the scenario</p>	N.S.	The transition to a new model of tourism focused more on quality than on large volumes has yet to find a clear direction and above all will have to deal with the significant growth in prices and with one scenario of economic slowdown expected in the next few years.	

References	Source	Key Trends	Actions to take	Emerging themes	Final Considerations
		considered. In fact, the research draws three possible scenarios: from one positive to another negative passing through an intermediate scenario.			
	About the Hybrid Project Management profile	<p>Required managerial profiles:</p> <p>a) for the green transition: mobility manager and energy manager;</p> <p>b) in the technology sector, including cloud, mobile, big data analytics, IoT, digital marketing etc.: business analyst, social media manager and digital media specialist, cloud computing specialist, big data specialist, data scientist, IoT expert, the AI specialist and the robotics specialist;</p> <p>c) in consultancy services for the implementation of the PNRR (National Recovery and Resilience Plan): project manager.</p>	N.S.	Above all, the sectors where work flexibility is greater are growing more rapidly.	
<b>ENTE BILATERALE NAZIONALE TURISMO (EBNT) (2022), <i>La sfida della riqualificazione professionale dei lavoratori nel</i></b>	About the value of sustainability in tourism	In the future, the new global trends related to sustainability, valorisation and protection of local realities will have an ever-greater influence, as well as technological development trends and organizational.	We need to rebalance the tourist offer by contrasting excessive urban polarization (overtourism phenomenon), while other destinations remain under-valued	Training interventions will be necessary for the workers to promote energy saving and the creation of more awareness of sustainability.	The most interesting elements of the document concern the dynamics of the labor market in the tourism sector in Italy. The need to implement training is particularly stressed, especially regarding the basic levels.

References	Source	Key Trends	Actions to take	Emerging themes	Final Considerations
<b>settore turistico/ricettivo nell'epoca del 4.0</b>			or subjected to excessive 'seasonalisation'.		Training that develops greater sensitivity towards sustainability is considered very important.
	About the tourism labour market, skills and trainings in the tourism sector	<p>Among those hired in 2021 with regard to the tourism hyper-sector the highest number of hirings is found for the category of those who do not have any educational qualifications, followed by subjects with professional qualification or diploma.</p> <p>In general, for all productive sectors the main one funding channel for training activities is that of company's own resources. In 2021, only 15.3% of tourism businesses provided training.</p> <p>Among the tourism companies that have carried out internal or external training, almost half (41%) are large enterprises with over 500 employees.</p>	It is urgent to develop transversal skills capable of capitalizing on customer relations also through the use of digital tools.	<p>The tourism sector workforce is generally low of education and training.</p> <p>Our tourism system shows little propensity to invest in training.</p>	However, personnel training is expensive and more easily implemented by medium-large companies.
	About the Hybrid Project Management profile	As regards the specialized figures with a university education required by the tourist market who will take on managerial roles and/or responsibilities, in 37.8% they will have to apply innovative/creative solutions.	N.S.	N.S.	

References	Source	Key Trends	Actions to take	Emerging themes	Final Considerations
<b>DELOITTE ITALIA (2022), Obiettivo sostenibilità. Nuove traiettorie di sviluppo per il turismo italiano</b>	About the value of sustainability in tourism	75% of Italians believe that the growth of sustainable tourism is one element key to the turning point of our country towards a transition ecological structure and widespread throughout the territory, through the development of infrastructures to support solutions green in transport, energy production, waste and in tourist services.	Traveling “like a local” (see regenerative tourism) is an effective way to support the local economy, for example by choosing restaurants offering zero-kilometre products (45%) or relying on tours local operator for their excursions, paying attention to prioritize organized activities that are not a threat for natural habitats and local wildlife (41%).	N.S.	<p>Nowadays, the demand for sustainable products and experiences plays a fundamental role in the tourism market today.</p> <p>The enhancement of local resources and the effective marketing of the tourist offer need specialized training focused on the issues of sustainability and the well-being of the local community.</p>
	About the tourism labour market, skills and trainings in the tourism sector	Employee development and training, as well as valuing diversity and inclusion, have become essential factors for the success of tourism businesses.	It is also important to work at the level social to improve the attractiveness of the tourism sector, for example through the creation of dedicated training courses in the field of school education that make it possible		

References	Source	Key Trends	Actions to take	Emerging themes	Final Considerations
			to create functions highly specialized.		
	About the Hybrid Project Management profile	Growing profiles: energy manager and facility manager	N.S.	N.S.	
<b>KPMG (2018), Hybrid IT at scale. Come implementare un modello operativo IT di nuova generazione</b>	About the value of sustainability in tourism	N.S.	N.S.	N.S.	N.S.
	About the tourism labour market, skills and trainings in the tourism sector	Two emerging trends: 1) the concept of Manufacturing 4.0 has brought about a new paradigm of the way of 'doing industry' and of working in the factory; 2) digitization has suddenly changed consumers' needs and expectations, creating in them the desire to be 'unique protagonists' in the shopping experience.	N.S.	N.S.	
	About the Hybrid Project Management profile	2 challenges: on the one hand, respond quickly and flexibly to the growing demand for innovation (with increasingly shorter cycles), on the other hand, guarantee the operation and stability of the ICT infrastructures and traditional business systems.  As a result of the two challenges, a hybrid operating model emerges, in	It is essential not to ignore the flow of technological innovation: this would compromise the company's competitiveness and would mean put in	The integration of new technologies into products and services of business causes, first of all, an active involvement of the IT function in 'core' processes.	The new models of industrialization - in our case, also of tourism - provide for innovative management methods. In the foreground is the approach that facilitate the management of hybrid project portfolios, which have within them the application of approaches that facilitate the



References	Source	Key Trends	Actions to take	Emerging themes	Final Considerations
		<p>which the traditional Plan-Build-Run approach complements the revamped one's skills and responsibilities of the IT organization.</p> <p>For the next few years, the general perception (85% of respondents to an international KPMG survey) is that projects will tend more and more to run in hybrid mode, with a greater prevalence, however, of agile methodologies compared to traditional ones.</p>	<p>danger the survival on the market.</p> <p>In today's Digital Transformation landscape, CIOs must increasingly acquire the role of strategic innovators.</p>	<p>Many companies redefine the organizational model, moving from typically IT-centric models to Digital-centric models.</p>	<p>management of portfolios of hybrid projects in which traditional (waterfall) and emerging (agile) management strategies coexist.</p> <p>From a training point of view, staff alignment with the new corporate culture is required.</p>

## The PNRR and the new specialist training courses

With the Covid-19 pandemic, tourism industry in Italy has lost approximately 200 thousands of workers, who changed their job field- stated the President of Confindustria-, the Italian Employers' Federation and National Chamber of Commerce (Federturismo Confindustria, 2023).

Federturismo Confindustria identifies the gap between education and labour-market needs as one of the main challenges that the tourism industry has been facing in the past few years. Indeed, the pandemic highlighted the vital importance of resilience and flexibility in the tourism sector, which are two key elements to respond to the deep changes and new labour market's needs and trends. In such context, the digital world can ensure an effective transition. It is therefore necessary to rethink tourism for the future, by upskilling and reskilling the professionals in tourism sector with effective management, creativity, innovation, and entrepreneurship, and by promoting digital transition, resilience and a greener tourism system (OECD, 2020).

According to Kinetès, an Italian research centre aimed to promote culture through a scientific approach, the tourism industry should seize the unique opportunity to develop new job profiles, that can keep up with the current and future market's trends and needs.

Actually, in the last few years new job profiles already emerged both at an international and national level, and among them, it is worth mentioning the following ones:

- Travel planners take care of designing, planning, communicating, and coordinating all the aspects of a company's travel-related activities. The skills required for this job include communication, time management, and problem-solving, respectively (Climb, 2022).
- Travel designers are responsible for recommending and designing personalized touristic experiences. Core skills required for this job are flexibility, research, organizational, and interpersonal skills, and storytelling (Morning Future, 2020).
- Promoters of sustainable tourism take care of guiding the development of the touristic offer, based on standards related to sustainability and protection of the local heritage. The promoters of sustainable tourism are responsible for conducting analysis, providing innovative solutions to ensure sustainable offers for travelling, managing the relationships with the experts in environmental protection, raising awareness on the principles of sustainability, and coordinating the operators involved in the development of sustainable projects. Among others, the following skills are required for this job profile: interpersonal competencies, flexibility, organization, reliability, creativity and propensity to innovate (Formazione Turismo).
- Social Media managers are responsible for communication on websites within tourism enterprises to promote related services and products. The skills required for this profile



include content management, creativity, analytical and communication competencies (Resources for employers).

It is clear from this framework that in such a growing sector, additional highly specialized profiles in terms of qualification and expertise are needed, as well as greater attention to such key competences as digital and linguistic skills, as well as social marketing and storytelling (Informa Giovani Roma Capitale). Based on Federturismo Confindustria's analysis of the main trends in the tourism sector, the post pandemic era will be focused on digitalisation, sustainability, artificial intelligence, and hybridness. Furthermore, post-covid tourism will necessarily have to combine management practices together with a holistic approach.

In such context, it would be highly desirable to rely on the profile of the Hybrid Project Manager, that does not exist in Italy, even though it is worth noting that there is a certain level of awareness of the need of this job's specific qualifications and skills. Indeed, there is a job profile called Digital Customer Acquisition Manager that works in the tourism industry, who is responsible of planning and implementing marketing strategies aimed at acquiring new clients and reaching the strategic goals of the touristic enterprise (LinkedIn). This profile, as well as the aforementioned emerging professions, share some skills with the ones that a Hybrid Project Manager should have (e.g., management, digital, creative and analytical skills), but in all of these job profiles it seems that they have an expertise in a specific field or in relation to specific skills, and that they rely on external resources or synergies to ensure a more comprehensive work.

On the contrary, the Hybrid Project Manager aims to be a unique and independent job profile with all these skills to face competition in the global tourism market.

Within this context, it is worth noting some positive aspects that will potentially facilitate the development of more structured and upskilled job profiles in the tourism industry, namely:

- a) the National Recovery and Resilience Plan;
- b) the new specialist training courses dedicated to managerial profiles working in tourism sector;

***The National Recovery and Resilience Plan (NRRP)***, approved in 2021, outlines the reforms, the goals and the objectives that Italy seeks to carry out through NextGenerationEU funds to mitigate the COVID-19 socio-economic impact and lead Italy to a greener and more inclusive country, with a more innovative and competitive economy (Agenzia per la Coesione Territoriale, 2021). The National Recovery and Resilience Plan is broken down into 6 Missions, representing the structural thematic areas of intervention, of which the one relevant for the purposes of this research is the first one, dedicated to Digitalisation, Innovation, Competitiveness, Culture and Tourism. Its aim is to rethink the tourism products and experiences, and to align them with sustainability standards through the use of innovative and digital tools. In addition, with this, the NRRP includes the investment to upskill professionals in tourism sector, especially those working in small- and medium-sized tourism enterprises in Italy's less developed regions.



However, there are no further details on the type of training that professionals in tourism sector will benefit from, and who will be in charge of providing adequate training. With this aim, the Tourism Digital Hub was developed, accessible through a dedicated web platform, *“allowing the entire tourism ecosystem to enhance, integrate and promote its attractions. The investment will fund digital infrastructure, artificial intelligence models for data analysis and basic digital services for tourism businesses”* (Italia Domani). Within the Tourism Digital Hub project, a new weekly infographic titled: *“Come va il turismo in Italia?”* (In English, *“How is tourism going?”*) was published in the section *“Data and Statistics”* of the institutional website of the Italian Ministry of Tourism. Every week, this section includes the updates and some in-depth analysis on the latest trends in the tourism industry. The aim of this initiative is to keep track of the trends and needs in the tourism sector, and to possibly adapt the market to the main European competitors. Among the main institutional data within the infographics, it is worth mentioning the EU Tourism Dashboard, which is an online tool developed by the European Commission, aimed to promote, and monitor on the one hand the green and digital transitions, and on the other hand the socio- economic resilience factors of the European tourism ecosystem. It is relevant to note the way the EU Tourism Dashboard is structured under 3 main policy pillars: ‘environmental impacts’, ‘digitalisation’, and ‘socio-economic vulnerability’.

**Specialist training courses** dedicated to management in tourism industry: a relevant example is the represented by the advanced training course *“Tourism Product Management”*, that was launched in 2021 in Trentino as a result of the acknowledgment of the key role of management in the promotion of territorial tourism in the Italian region of Trentino Alto Adige through the Provincial Law 8/2020. In details, it is worth mentioning the following articles:

- Article 7 makes a list of the areas of intervention of tourism agencies, one of which is to support professionals in tourism industry in the following processes:
  - Engagement and designing process of the tourism product, and development of seasonal offers.
  - Use of system platforms.
  - Promotion of the territory, artistic, historical, and environmental heritage, with regards to the circular economy-related initiatives.
- Article 11 encourages training and tutoring courses and activities, so as to offer high-quality training, support and mentoring programs and services targeting tourism professionals to ensure the establishment of good relationships with the hosts.

This specific course offered by Trentino School of Management targets young professionals in tourism industry, managers, consultants, Master’s degree students who are willing to develop skills and knowledge related to the management and marketing in the tourism sector. The learning outcomes of the course are the following:



- To plan innovative solutions;
- To develop the marketing strategy;
- To manage the relationships with the touristic enterprises active in the territory;
- To read and interpret the market's main needs and trends;
- To manage projects through practices and techniques of project management;
- To develop networks with the local actors in order to improve the reception offer for the touristic destinations;
- To develop storytelling skills for better territorial promotion.

The aim of this educational path is to upskill new job profiles with specific skills of the project management, and to use the territory of Trentino Alto Adige as a laboratory to learn and practice, where a continuous and direct interaction with managers and other experts is ensured.

**Table 6: Indirect Sources Analysis**

	Type of Source	Territorial Scale	Type of Document
Analysis of indirect sources	<b>Governative/ institutional bodies:</b> <ul style="list-style-type: none"> <li>• Agency for territorial cohesion</li> <li>• Ministry of Tourism</li> </ul>	<ul style="list-style-type: none"> <li>• National</li> <li>• National</li> </ul>	<ul style="list-style-type: none"> <li>• Development plan</li> <li>• Weekly infographics &amp; Tourism Digital Hub (Statistics/ online databases and reports)</li> </ul>
	<ul style="list-style-type: none"> <li>• Council of the Autonomous Province of Trento</li> <li>• European Commission</li> <li>• The World Tourism Organisation (UNWTO)</li> </ul>	<ul style="list-style-type: none"> <li>• Local</li> <li>• Supranational</li> <li>• International</li> </ul>	<ul style="list-style-type: none"> <li>• Provincial Law</li> <li>• Online Database</li> <li>• Online Database / Statistics / Economic data</li> </ul>
	<b>Professional and academic institutions</b> <ul style="list-style-type: none"> <li>• Trentino School of Management</li> </ul>	<ul style="list-style-type: none"> <li>• National</li> </ul>	<ul style="list-style-type: none"> <li>• Presentation of course</li> </ul>
	<b>NGOs</b>	-	-
	<b>Research institutions</b> <ul style="list-style-type: none"> <li>• Kinètes</li> </ul>	<ul style="list-style-type: none"> <li>• National</li> </ul>	<ul style="list-style-type: none"> <li>• Article</li> </ul>
	<b>Internet websites</b> <ul style="list-style-type: none"> <li>• Climb</li> <li>• Morning future (blog)</li> </ul>	<ul style="list-style-type: none"> <li>• International</li> <li>• National</li> </ul>	<ul style="list-style-type: none"> <li>• Article</li> <li>• Article</li> </ul>



	Type of Source	Territorial Scale	Type of Document
	<ul style="list-style-type: none"> <li>• Ufficio Stampa Il Trentino</li> <li>• Ragusa News</li> <li>• Resources for Employees</li> </ul>	<ul style="list-style-type: none"> <li>• Local</li> <li>• Local</li> <li>• International</li> </ul>	<ul style="list-style-type: none"> <li>• Project Evaluation</li> <li>• Article</li> <li>• Article</li> </ul>
	<b>International organizations/centres</b> <ul style="list-style-type: none"> <li>• OECD</li> </ul>	<ul style="list-style-type: none"> <li>• International</li> </ul>	<ul style="list-style-type: none"> <li>• Technical Report</li> </ul>
	<b>Other</b> <ul style="list-style-type: none"> <li>• Alternative-native Energies Festival</li> <li>• Formazione Turismo</li> <li>• Federturismo Confindustria</li> <li>• Informa Giovani</li> <li>• LinkedIn</li> </ul>	<ul style="list-style-type: none"> <li>• National</li> <li>• National</li> <li>• National</li> <li>• National</li> <li>• International</li> </ul>	<ul style="list-style-type: none"> <li>• Report</li> <li>• Article</li> <li>• Technical reports / Economic data / Statistics</li> <li>• Article / Social data</li> <li>• Article</li> </ul>



Table 7: Topic Areas of Indirect Sources Analysis

Source	Key Trends	Actions to take	Emerging themes	Final Considerations
<b>About the value of sustainability in tourism</b>	N.S.	<ul style="list-style-type: none"> <li>Promotion of the territory, artistic, historical, and environmental heritage with regards to the circular economy-related initiatives (Council of the Autonomous Province of Trento)</li> </ul>	N.S.	<ul style="list-style-type: none"> <li>Promoting digital transition, resilience, and a greener tourism (OECD, 2020)</li> </ul>
<b>About the tourism labour market, skills and trainings in the tourism sector</b>	<ul style="list-style-type: none"> <li>The post-covid tourism will have to combine management practices, together with a holistic approach.</li> </ul>	<ul style="list-style-type: none"> <li>Upskilling and reskilling the professionals with effective management, creativity, innovation, and entrepreneurship (OECD, 2020)</li> </ul>	<ul style="list-style-type: none"> <li>Gap between education and labour- market needs (Federturismo Confindustria)</li> <li>Skills that need to be developed: <ul style="list-style-type: none"> <li>To plan innovative solutions;</li> <li>To develop the marketing strategy;</li> <li>To manage the relationships with the touristic enterprises, that are active in the territory;</li> <li>To read and interpret the market's main needs and trends.</li> <li>To manage projects through practices and techniques of project management.</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>Digital and linguistic skills, as well as social marketing and storytelling are needed in tourism industry (Informa Giovani Roma Capitale)</li> </ul>
<b>About the Hybrid Project Management profile</b>	<ul style="list-style-type: none"> <li>This job profile does not exist in Italy</li> </ul>	<ul style="list-style-type: none"> <li>Launching more training courses to develop the specific skills of a HPM.</li> </ul>	<ul style="list-style-type: none"> <li>To develop networks with the local actors to improve the reception offer for the touristic destinations.</li> <li>To develop storytelling skills for better territorial promotion (Trentino School of Management).</li> </ul>	<ul style="list-style-type: none"> <li>There is a certain level of awareness of the need of HPM's specific qualifications and skills.</li> <li>The HPM aims to be a unique and independent job profile with all the necessary skills to face competition in the global tourism market.</li> </ul>

## Two best practices

A best practice has been identified in the ***Alter-native energies festival***, launched in Gibellina, Sicily, in 2007 with the idea of creating an innovative event to be held every year in Sicily in unique venues (e.g., archaeological sites such as the Cuma Archaeological Park, Pozzuoli, and wind farms). In Italy, it is the first and the only festival entirely run on renewable energies and based on these types of energies (Italia che cambia, 2022).

The mission of the festival was “to create a community of artists, companies, public bodies, and citizens that gather to promote the applications of renewable energies and sustainability”, and that they could express their alter-nativeness.

The festival is funded by private companies and donors, such as public bodies (e.g., Sicilian Regional Assembly), artists, environmental associations (e.g., Green Cross Italia), cultural centres and cities. The Alter-native energies festival promotes talk-show meetings to raise awareness on renewable energies, workshops for schools, fashion shows with recycled clothes, concerts and theatre and dance performances representing the relationship between humans and the renewable energies. For instance, in 2007 “Vento soffia più forte” (in English, “Wind, blow strongly!”) was performed by the Sicilian theatre actress, Miriam Palma, who offered a show on the importance of wind energy. The innovative element in the theatre performance was the smart use of shadows, and the only use of a guitar and a mandolin.

Since its launching in 2007, the festival that started in Gibellina, a small town of Sicily, spread out across the region of Sicily at first (Palermo, Catania, Messina, Enna, San Vito Lo Capo), and in Rome and Torino at a later stage. Over time, the Alter-native festival evolved and expanded its offer in the last editions, in which concerts from music genres from all over the world mixed and representing a contamination of popular music with the traditional one.

The Alter-native energies festival can be considered as a good practice, as through art (dance and theatre performances), it promotes alternative ways of discovering the cultural and archaeological heritage of Italy. To achieve this goal, the approach that has been deployed is holistic, as several cultural centres, environmental associations, cities and regions, companies and artists gather in the name of sustainability and promotion of renewable energies. In such context, the typical skills of project management, such as analysing, planning, coordinating, creating, and managing, are required in the organizational process, as well as in the implementation phase.

A second best practice was suggested by one of the focus group participants. It concerns the experience of ecomuseums in Italy, and in particular that of the ***Rocche del Roero Ecomuseum***. In the UNESCO definition, borrowed from Georges Henri Rivière, the ecomuseum is declared as:



«an instrument conceived, fashioned and operated jointly by a public authority and a local population. The public authority's involvement is through the experts, facilities and resources it provides; the local population's involvement depends on its aspirations, knowledge and individual approach» (Rivière, 1985, p. 182).

The ecomuseum is therefore an open-air museum where the local culture, the anthropological testimonies of the community, the knowledge of the territory become an intangible cultural asset. And, from a postmodern point of view, a tourist product.

In the case of the Rocche di Roero Ecomuseum, the partnership is represented by 24 small municipalities in the Roero-Langhe area of the Piedmont region in north-eastern Italy, which recently great success for its food and wine heritage. The activities carried out by the Rocche di Roero Ecomuseum range over various fields: promotion of the territory, didactics for schools, application of IT for the tourist offer, digitization of information, etc.

This ecomuseum embodies the elements of our interest, albeit with the inevitable distinctions that emerge when we are speaking of a territory and a community rather than a company or an institution. Here it is possible to see the ongoing changes in tourism practices as well as some attempts to provide specialized training to the stakeholders of the offer, and primarily to the local community. In fact, in the ecomuseums training courses are held ad hoc for local operators and for the animators of the territory. See, for example, the training course organized as part of the "Roero for all" project, aimed at improving the reception of disabled people, an initiative designed for local tourism businesses, students and local stakeholders<sup>5</sup>.

There are still some limits from the point of view of the managerial organization of the activities, but the reality of ecomuseums is constantly evolving, also from the point of view of management. Almost all Italian ecomuseums are equipping themselves with managerial figures who have the task of modernizing the organization of the structure and making it more efficient and competitive. Almost all Italian ecomuseums are equipping themselves with managerial figures who have the task of modernizing the organization of the structure and making it more efficient and competitive.

## Anexo G. Relatório nacional de Portugal

## Annex G. National Report of Portugal



### **WP2 Labour Market Needs Analysis and Development of a New Job Profile Certification**

#### **T2.2. Identification of Labour Market Needs – National Report of Portugal**



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## **1. Executive Summary**

This is a national report from Portugal that presents the main conclusions of the activities carried out to identify the labour market needs. In this sense it integrates primary research, quantitative (the questionnaire) and qualitative (the focus group interviews), as well as secondary research (desk research).

The main findings indicate that new skills are needed for tourism professionals, understanding that soft skills are so important as the technical skills, as well as creativity, innovation, entrepreneurship, sustainability, and other skills that can be aligned with market trends. Despite the need of new skills which a hybrid project manager may respond, the participants highlight the quality of tourism training in Portugal, and it was possible to identify different cases of best practices.

## **2. Introduction**

Hypro4st project aims to develop a new job profile (Sustainable and Hybrid Project Manager) for the tourism sector. Thus, it is necessary to understand the lack of skills in the actual tourism professionals and the upskills needed to a better response to the market needs.

The same methodology is applied in all country's partners in order to have a better understanding on these questions.

Therefore, this report includes the explanation of the methodology, the main results of the quantitative research (the questionnaire) and the qualitative research (the focus group interview). The members of the focus group are specialists in their areas, representing vocational training, associations, professionals, and entrepreneurs from the tourism sector.

Furthermore, desk research is presented and best practices in Portugal are identified, including national programs that aim to improve digital, sustainable, and other skills.

Finalizing the report some conclusions and recommendations based on participants' inputs are presented.

## **3. Methodology**

Regarding the questionnaire, it was used the survey template developed and approved by the project partners. The questionnaire translated into Portuguese shared among the target group of the project. The questionnaires were distributed by all Portuguese partners to relevant stakeholders during May, focusing on different stakeholders based on different areas of the country. In Portugal, 87 questionnaires were received, providing a diverse sample.

For analysing the quantitative data descriptive were used statics so as to summarise and organise them in a way to be easily understood. In addition, crosstab analysis to display the tables results of survey respondents. It was also developed table analysis to identify groups of respondents who share common characteristics.

The questionnaire in Portuguese was distributed through personalized emails/messages and used google forms tool. The online questionnaire included 21 questions of the different types (dichotomous; multiple choice; checkboxes; linear scale and multiple-choice grid) and consisted of the following sections:

- Introduction providing information regarding the project and the purpose of the survey
- Data of respondents
- Sustainability, skills, training in the tourism systems
- The Hybrid Project Management profile
- Final communication

The questionnaire was shared with the project target groups (managers; project managers; company owners; entrepreneurs; university professors; VET/Adult trainers; Tourism professionals; etc)

Google Forms automated responses' summaries and graphical representation of the responses were the main tools used for data processing.

Regarding the Focus Group, for the main activities it was selected 7 professionals from 6 different organizations profile. The members have high experience in entrepreneurship, tourism sustainability, project management and training and vocational education, for assuring that the job profile of the Sustainable Project Manager in Tourism Sector and the certified online training course will be relevant to the labour market needs. Moreover, to establish an effective process allowing the flow and co-creation of applied knowledge between vocational education and training, higher education, research, and the public and business sector by providing the opportunity for the staff members of organisations/ businesses in the tourism sector to be involved into market-based research activities.

To make it possible to meet the focus group participants, we chose to conduct the interview in an online format. For the participants who could not participate in the interview, a list with the interview questions was made available on the Trello platform.



**Figure 1:** list with the interview questions was made available on the Trello platform.

Due to time limitations, the questionnaire was made available to the focus group participants to be filled out after the interview.

## 4. Results and Discussion

### 4.1 Primary (qualitative) research: The Questionnaire

The primary quantitative research was conducted through online questionnaires, using google forms. The questionnaires were distributed by all Portuguese partners to relevant stakeholders during May, focusing on different stakeholders based on different areas of the country.

#### Sample description

The target population included tourism stakeholders from all country. Most respondents work in the private sector, followed by the public sector: 36 entrepreneurs, 17 professionals in the Accommodation/Hospitality Industry and then in equal representation project managers, travel agency managers, tour operators and professional in the Business Support Services. Most of the responders were between 35 and 49 years of age (50) and the second major group was between 50 and 64 years of age. There were predominantly more female responders (48) compared to male responders (38). A minimum sample size of 50 responders per county was set; however, a total of 87 responses were obtained. As mentioned before, the data was collected through an online questionnaire using the Google form option.

### Sustainability, skills, training in the tourism systems

Respondents believe that actions related to biodiversity conservation are the most crucial. However, climate change mitigation and circular economy responses indicate that these actions are also considered to be significantly important.



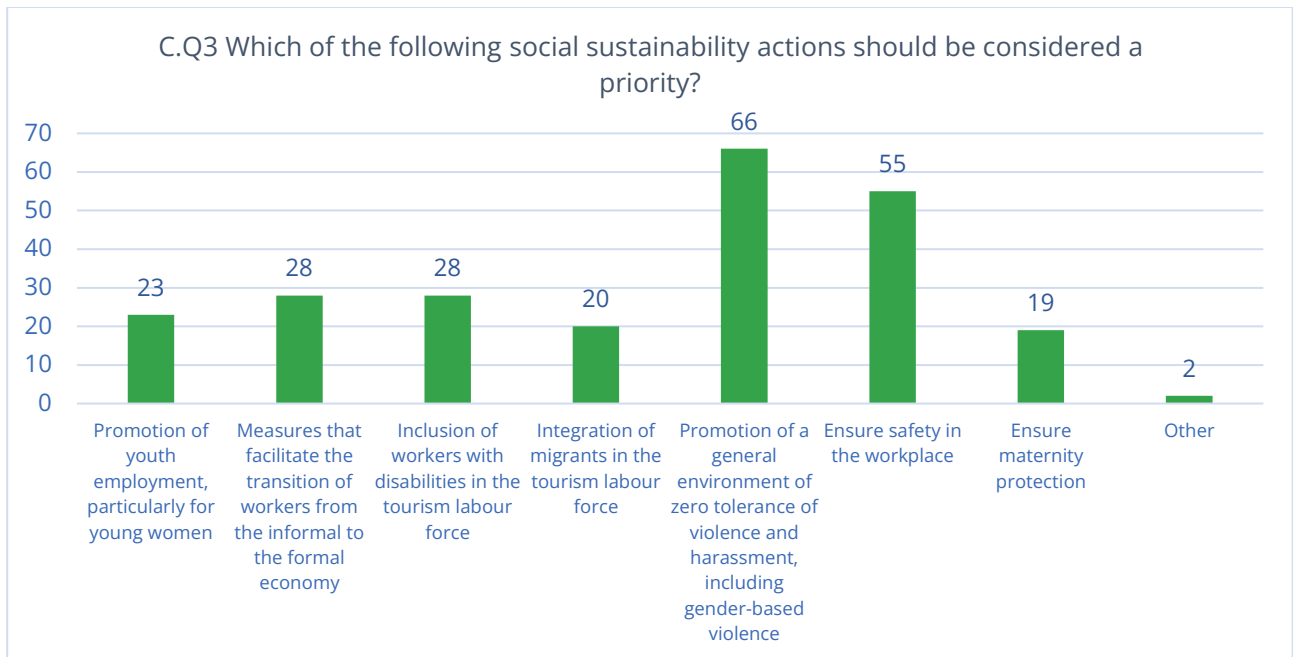
**Figure 2: Actions that should be implemented to the respondents' organizations to make tourism practices more sustainable**

The first reason for respondents to address sustainability issues is to align with the goals, mission and values of their organization. Also, rather important is to meet customer expectations and improve operational efficiency. It should be noted that the least preferred is response to competitive pressure.



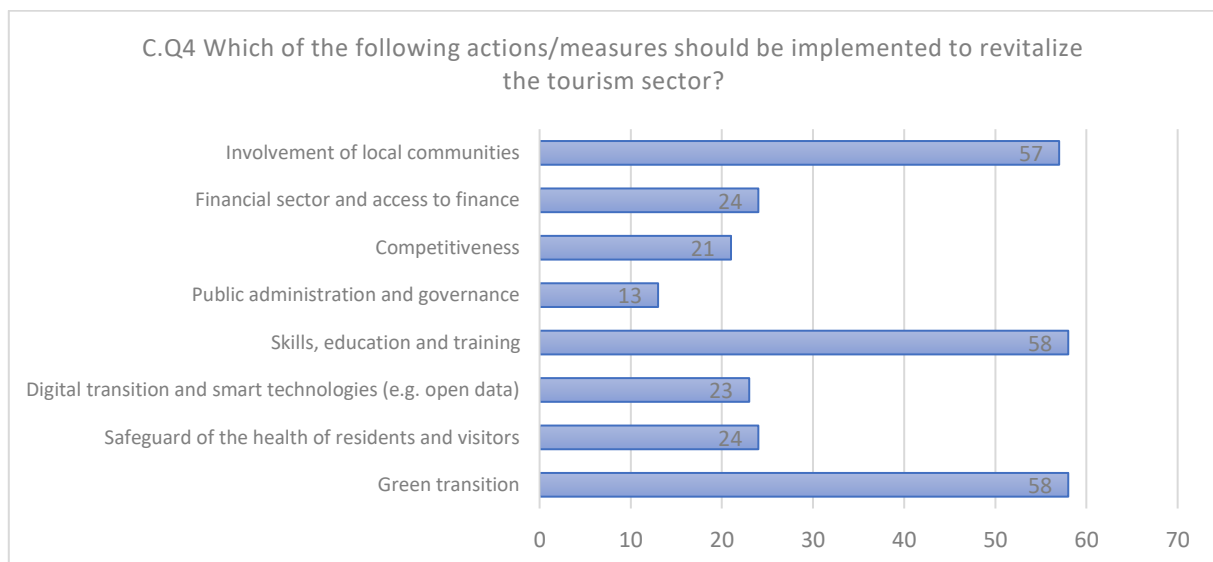
**Figure 3: Reasons for the respondents' organizations to address sustainability issues**

The priority, according to respondents, is to promote a general environment of zero tolerance of violence and harassment, followed by the insurance of safety in the workplace. Last on their priority list is the maternity protection.



**Figure 4: Promoting a general environment of zero tolerance of violence and harassment, including gender-based violence actions that considered a priority by the respondents**

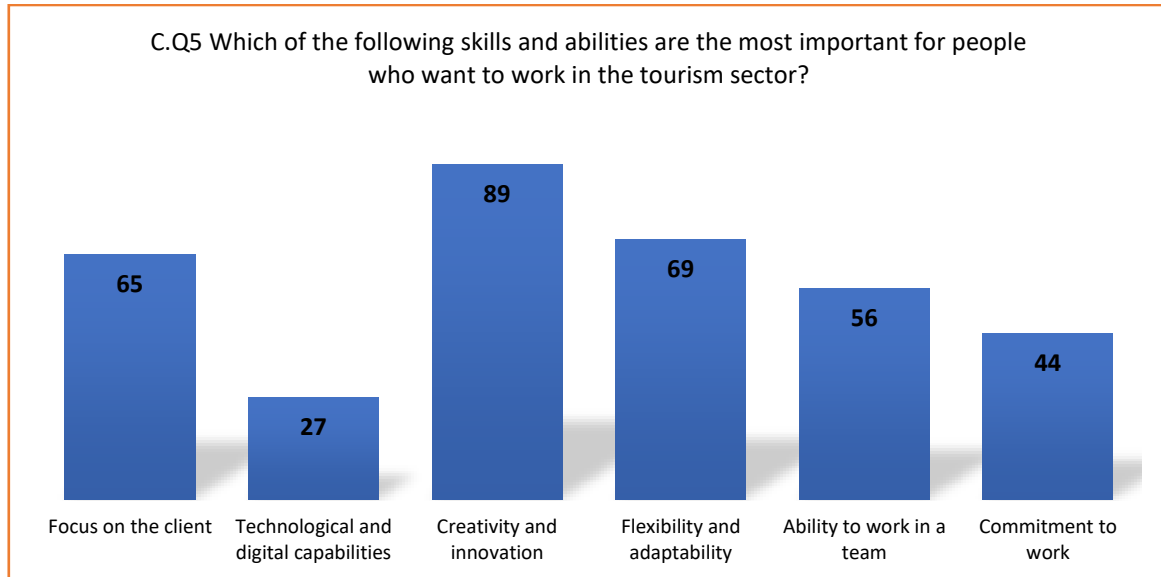
The most important action to be implemented to revitalize the tourism sector is the skills, education and training of employees and green transition and the least significant is public administration and governance.



**Figure 5: Measures that should be implemented to revitalize the tourism sector**

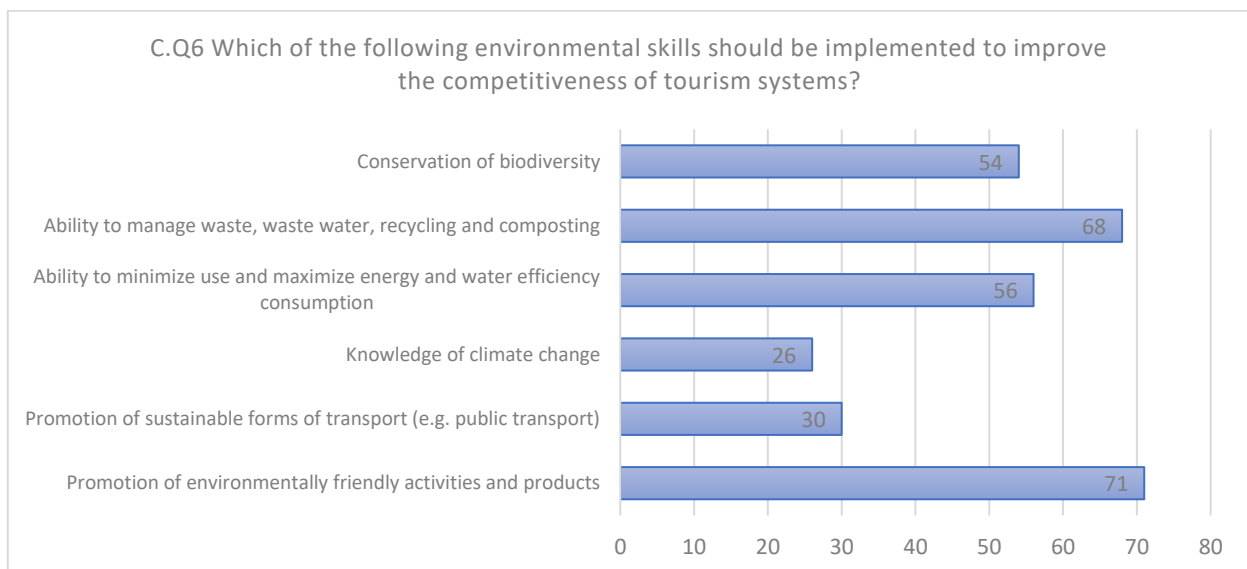


The most important skills for current or future employees in the tourism sector are creativity and innovation and right after flexibility and adaptability, whereas the least important is technological and digital capabilities. However, even the least important skills in terms of scale appear to be important for 27 of the respondents.



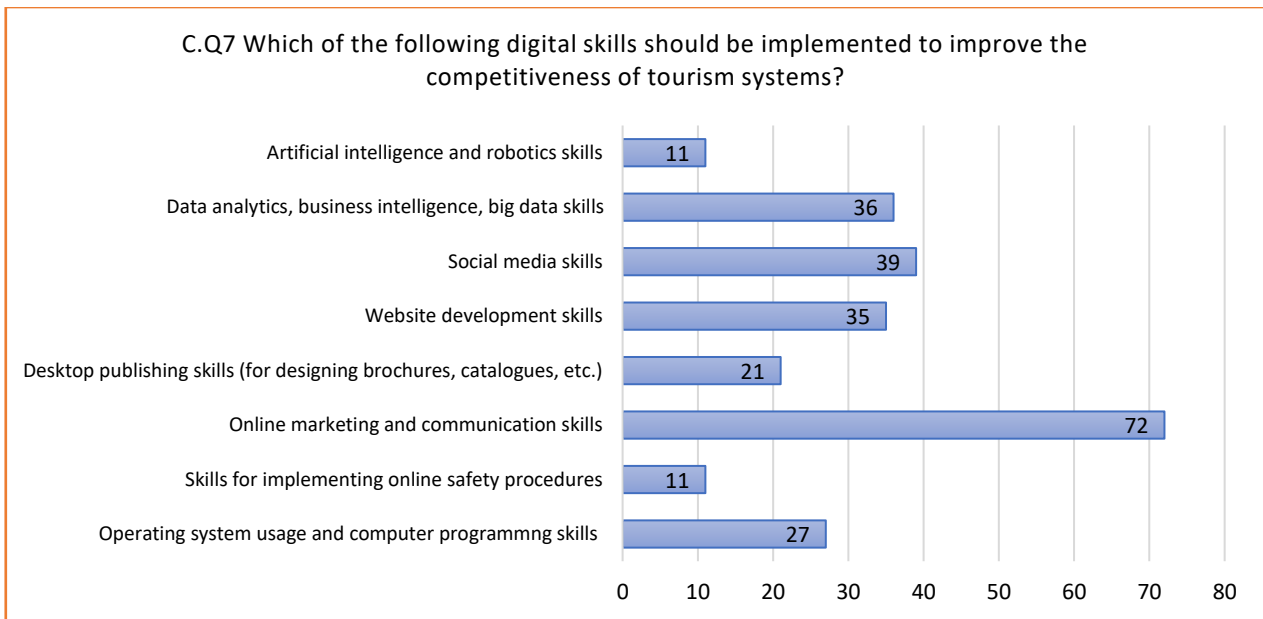
**Figure 6: The most important skill and abilities for people who want to work in the tourism sector**

The most important environmental skills that should be implemented to improve competitiveness of tourism systems is the promotion of environmentally friendly activities and products (71), followed by the ability to manage waste, waste water, recycling and composting (68). Also the ability to minimize use and maximize energy and water efficiency consumption is important for 56 of the respondents.



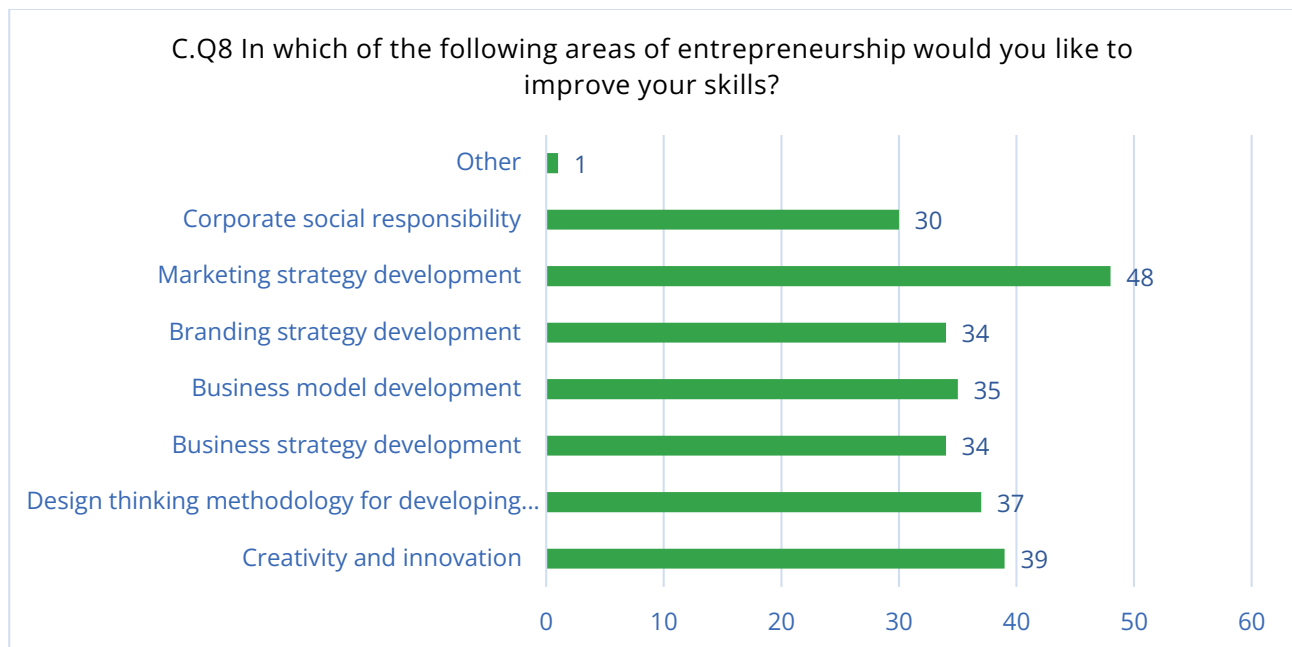
**Figure 7: Environmental skills to improve the competitiveness of tourism systems**

Online marketing, communication and social media skills are clearly the most popular skills, while social media skills as well skills for implementing online safety procedures do not seem to be relevant for tourism systems.



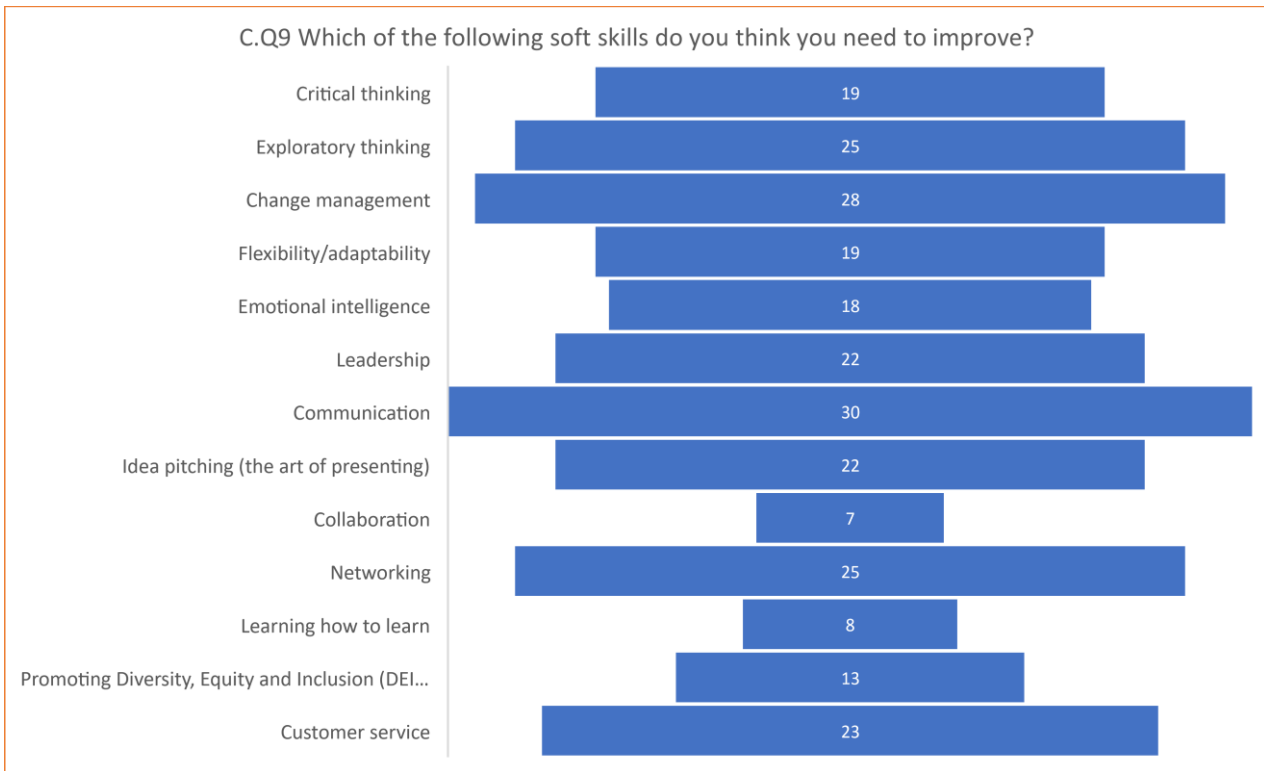
**Figure 8: Digital skills to improve the competitiveness of tourism systems**

Respondents were interested in almost all areas of entrepreneurship, with marketing strategy development (48) to be the most prominent among the responses.



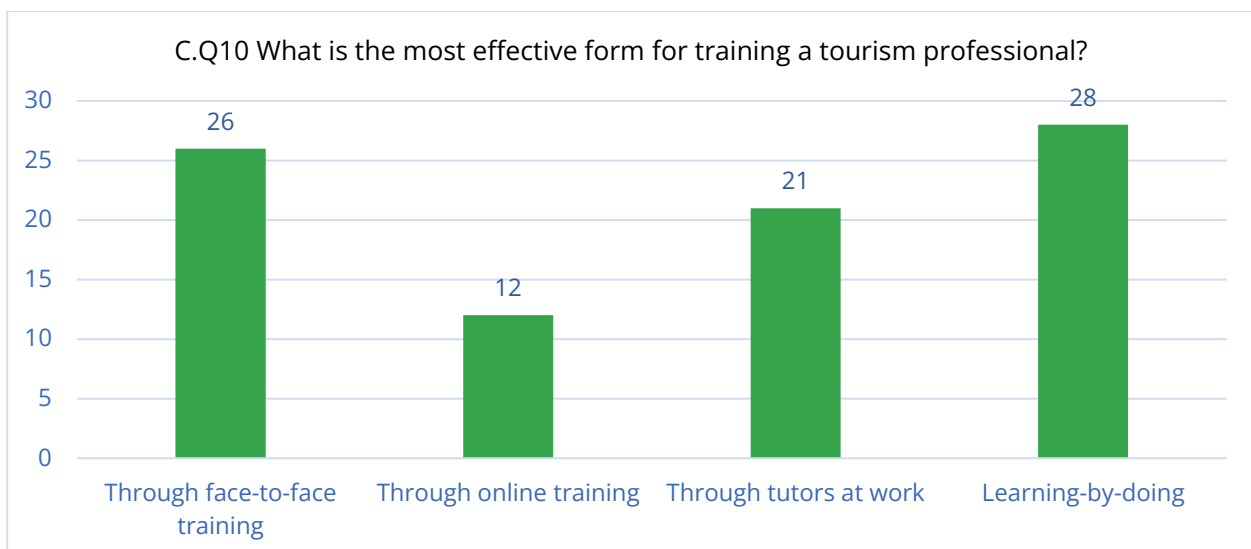
**Figure 9: Entrepreneurship areas that the respondents like to improve their skills**

In terms of soft skills, Communication and Change management are the most highly rated, while Collaboration is the least preferred.



**Figure 10: Soft skills that the respondents would like to improve**

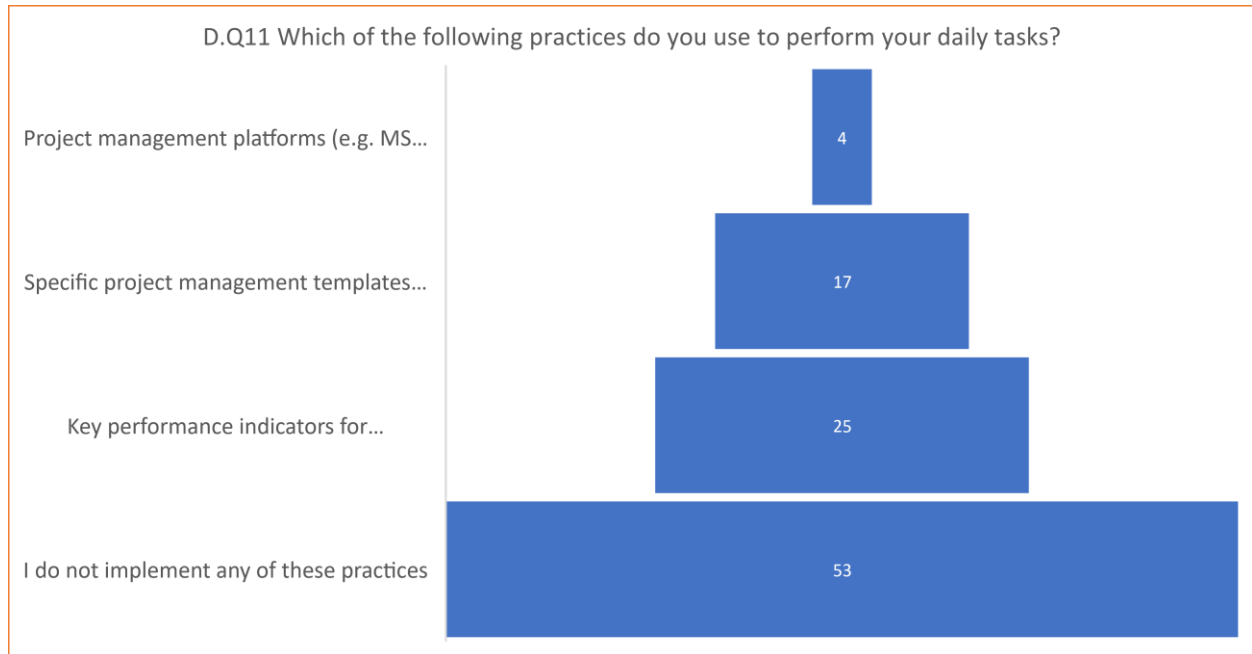
26 respondents believe that the most effective form of training is through learning-by-doing, 12 prefer face-to-face trainings, 21 thinks learning with tutors at work is the best way. The least preferred option is online training with 28 responses.



**Figure 11: Most effective form for training**

### The Hybrid Project Management profile

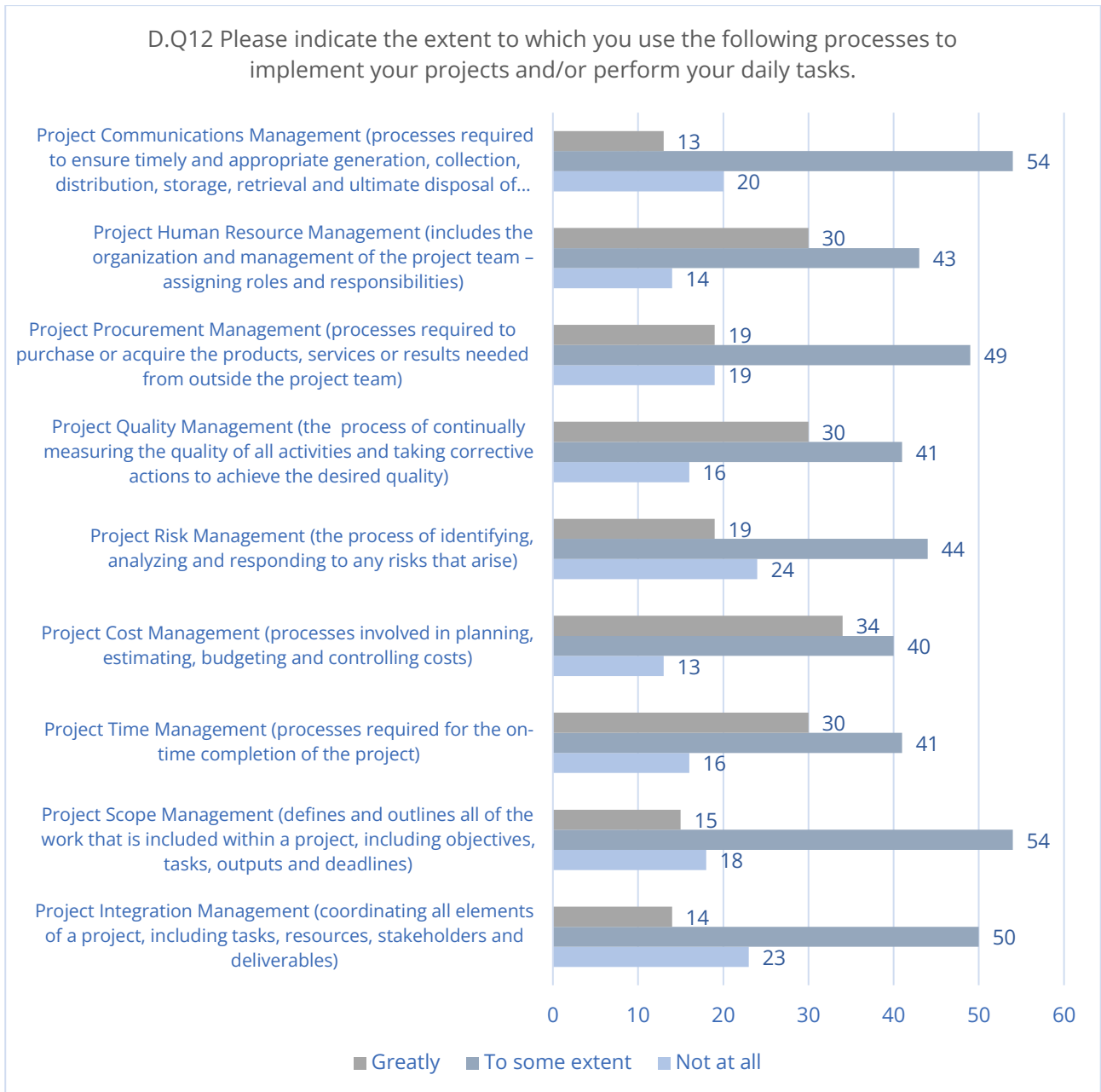
It is noteworthy that the majority of the respondents do not implement any of the key practices among the project management procedures. The most preferable of the given options is the use of key performance indicators for measuring quality, impact and success.



**Figure 12: Practices used by the respondents to perform their daily tasks**

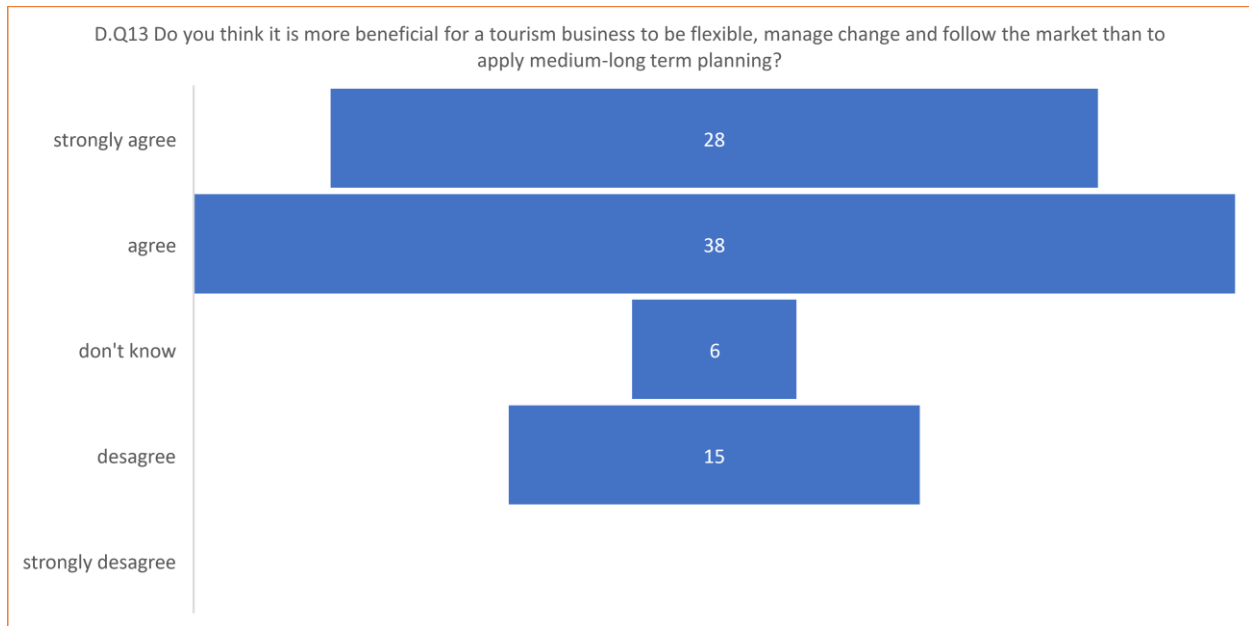
As shown below, the majority of the respondents have moderate knowledge of the various project management processes and use them to some extent to perform their daily tasks, while a significant number of them do not use these procedures at all.

There is a medium number of respondents who have a high level of knowledge and apply them on a daily basis.



**Figure 13: Extent to which respondents use different project management processes to implement their projects and/or carry out their daily tasks**

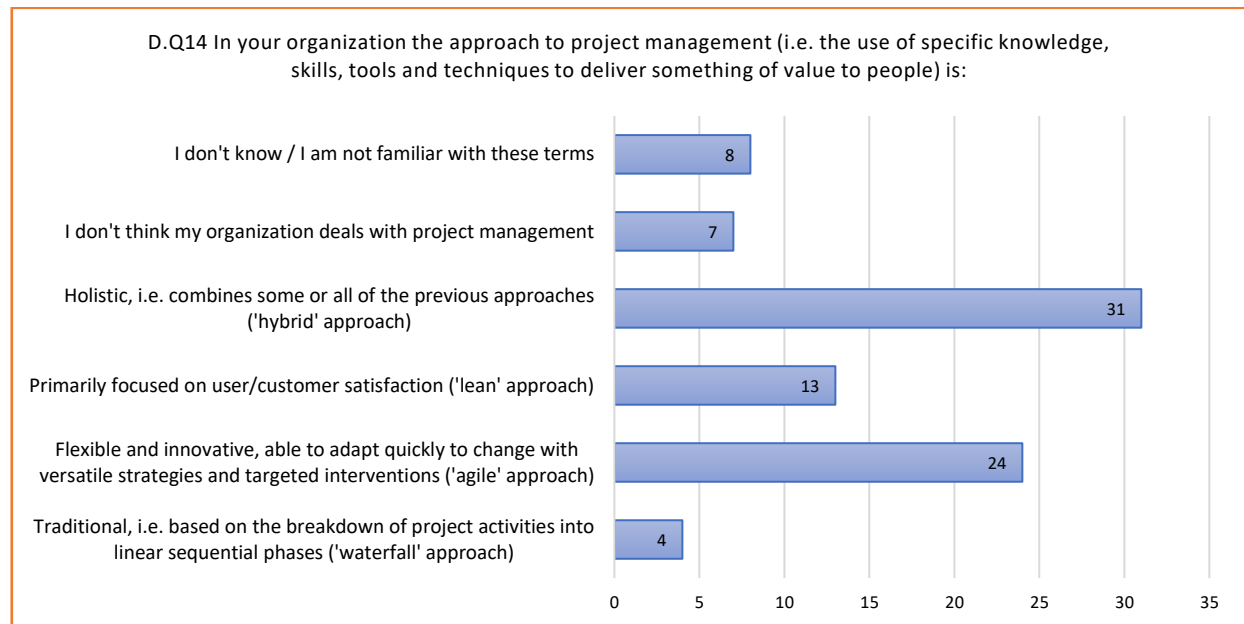
66 of the 87 respondents strongly agree or agree that it is beneficial for a tourism business to be flexible, manage change and follow the market than to apply medium-long term planning, while the 15 strongly disagree or disagree. There is also an 6 who stated that neither agree nor disagree.



**Figure 14: Whether or not it is beneficial for a tourism business to be flexible, manage change and follow the market than to apply medium-long term planning**

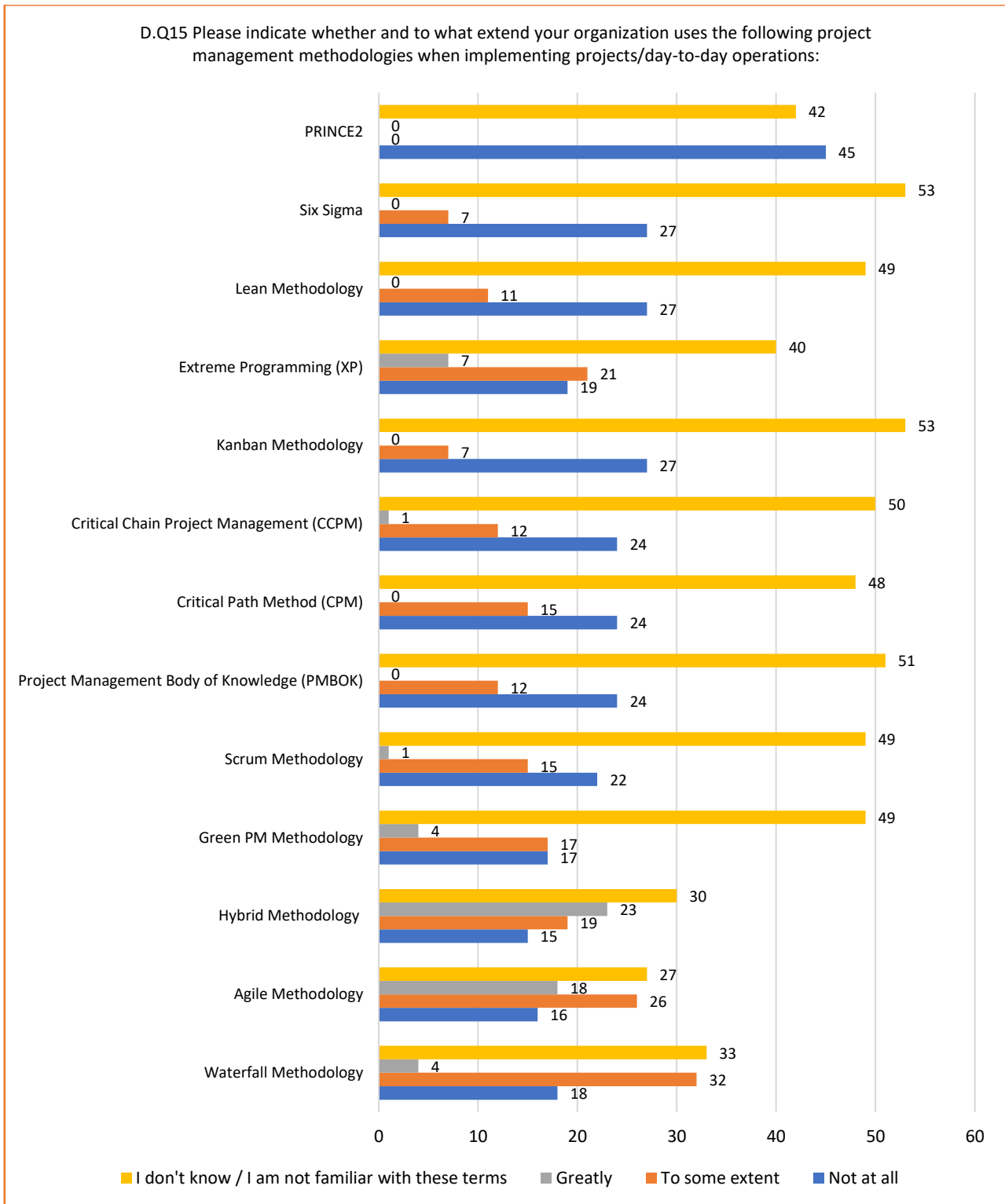
A significant number of respondents (31) apply hybrid approaches (holistic, i.e. combines some or all of the previous approaches). 24 of the respondents use agile approach.

15 do not apply project management methodologies at all in their daily activities or are not even familiar with these terms.



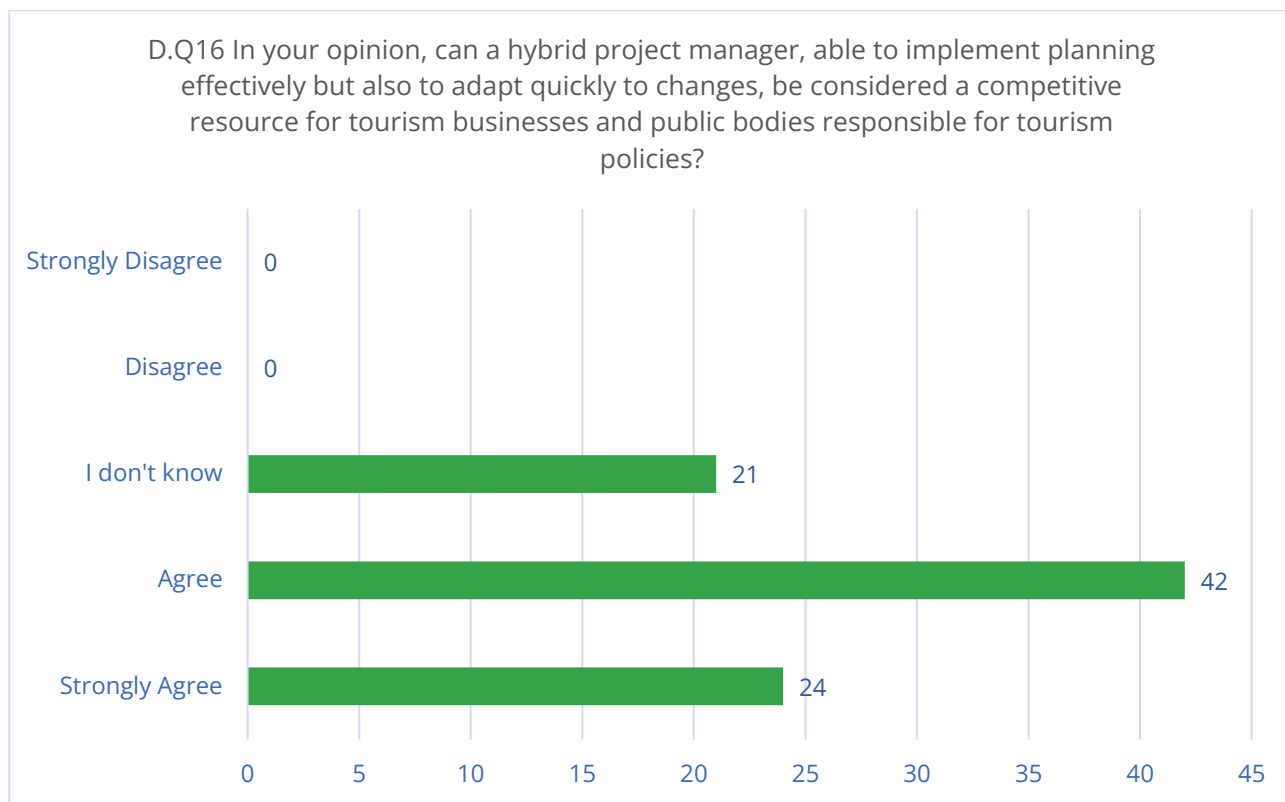
**Figure 15: The project management approaches used in the respondents' organizations**

42 of the respondents consider that hybrid methodology is the best project management methodology. However, the majority of the respondents don't know or are not familiar with any of the methodologies presented.



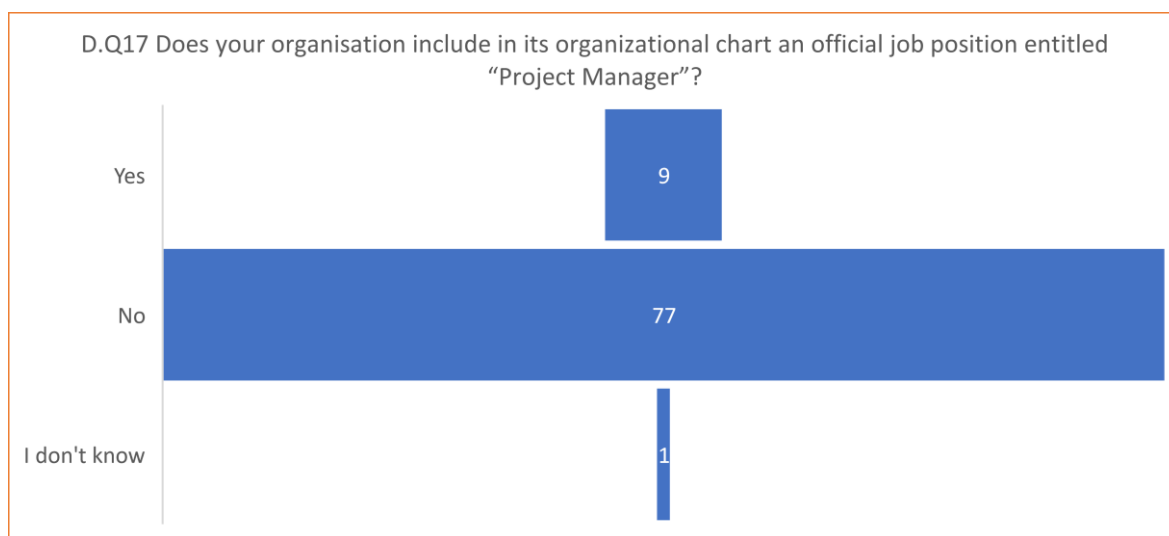
**Figure 16: Whether and to what extent the respondents organization uses project management methodologies when implementing projects/day-to-day operations**

66 respondents strongly agree or agree that the use of hybrid project manager can be considered a competitive resource. There is also 21 who stated that neither agree nor disagree.



**Figure 17: Whether or not a hybrid project manager can be considered a competitive resource for tourism businesses and public bodies responsible for tourism policies**

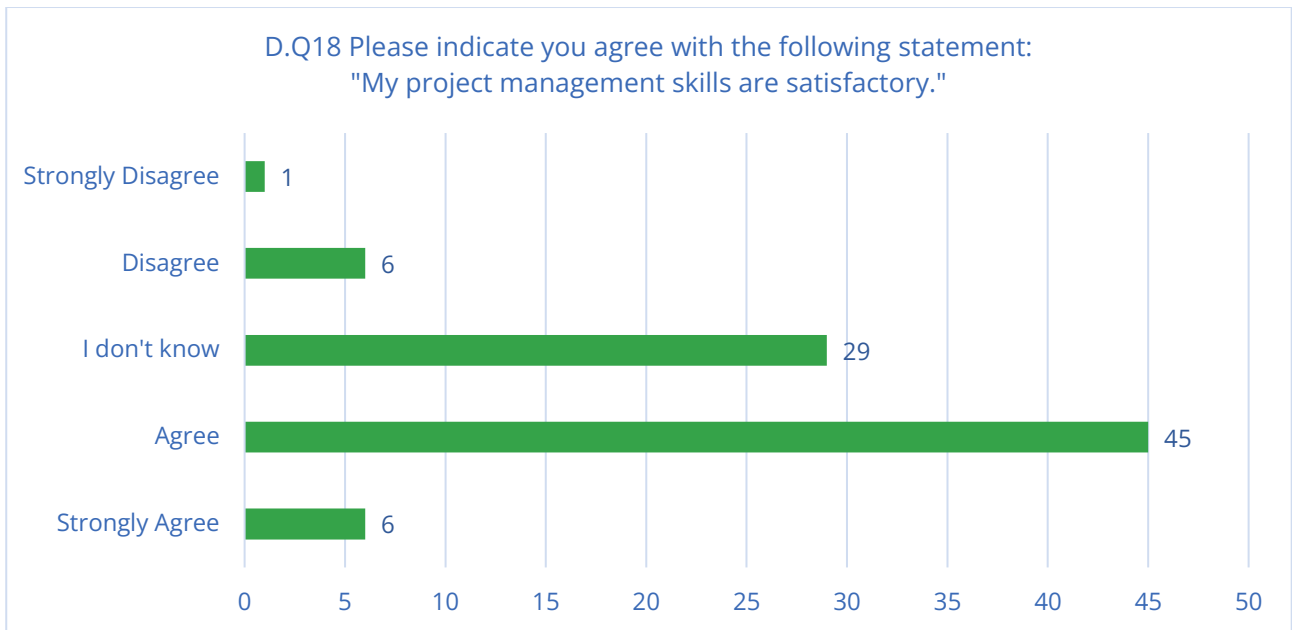
77 respondents stated that there is no official job position entitled “Project Manager” in the organizational chart, while only 9 stated that it exists. There is also a 1 that is not aware of the existence or not of this specific job position.



**Figure 18: Whether or not there is an official job position entitled “Project Manager” in the organizations’ chart**

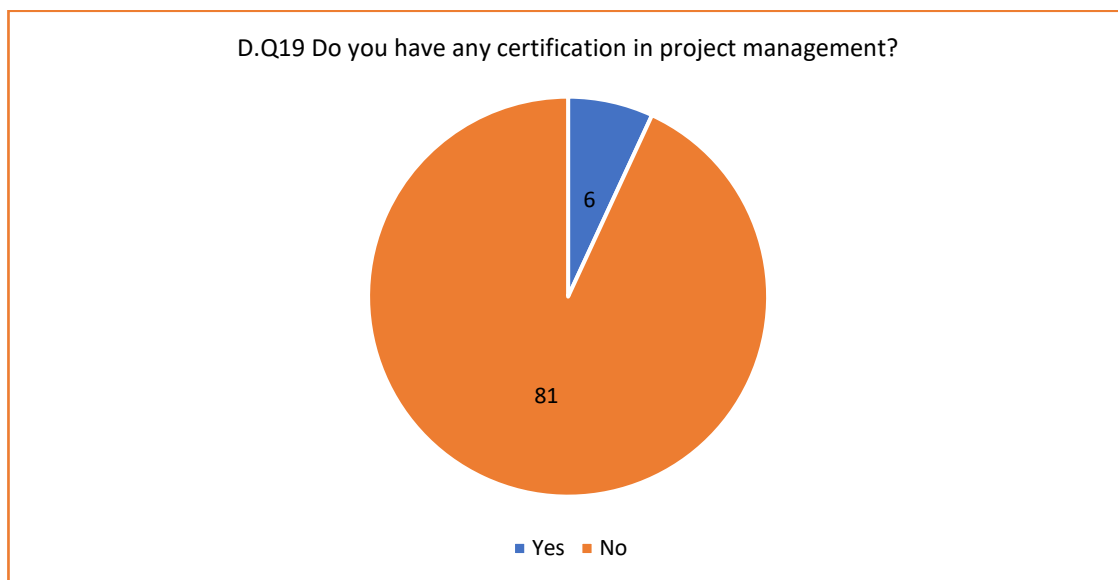


45 respondents find their project management skills satisfactory, while 7 believe otherwise – disagree or strongly disagree. There is also 29 who neither agree nor disagree with the statement.



**Figure 19: Respondents agreement degree to the statement "My project management skills are satisfactory"**

It is evident that only an extremely small number of respondents (6) hold a certification in project management.



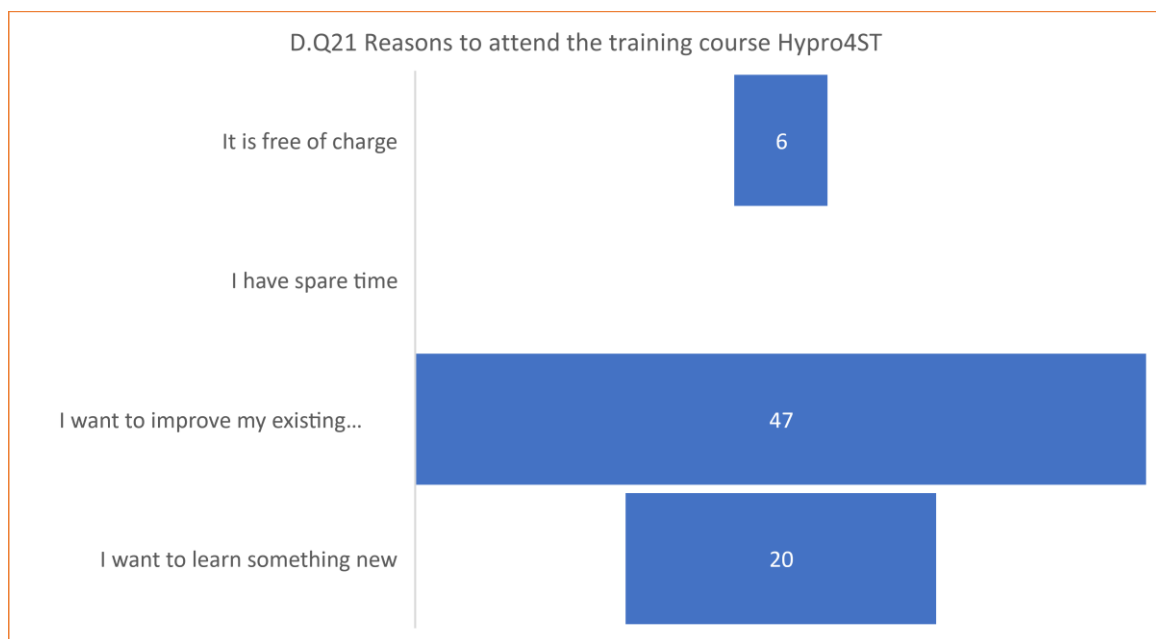
**Figure 20: Number of respondents holding a project management certification**

73 respondents are willing to attend the training course offered by the HyPro4ST project, while 14 are not interested.



**Figure 21: Number of respondents interested in attending the HyPro4ST training course**

The two main reasons for attending the training course are the improvement of their existing knowledge (47) and the willingness to learn something new (20).



**Figure 22: Reasons to attend the HyPro4ST training course**

## 4.2 Primary (qualitative) research: The Focus Group / The Interviews

The focus group participants belong to several areas and institutions associated with tourism such as Vocational Education, Tourism Sustainability and Project Management in order to obtain more diversified responses regarding the labour market needs for the tourism sector.

Among these institutions we have AHRESP - Associação da Hotelaria, Restauração e Similares de Portugal, a public utility organization that represents the entire Hotel, Restaurant and Beverages sector, with the mission to represent the companies in the Tourism sector and defends their rights and legitimate interests. In addition, it seeks to develop tools and instruments that streamline the short, medium, and long-term management of your business. And it operates in all areas that affect the daily business of the Tourism sector such as: management, training, health and safety, human resources, operations, and marketing and sales (AHRESP, n.d.).

Regarding the training area, Vertiriva operates in professional training in the areas of information and communication technologies, exact, social and human sciences, particularly in tourism sector; consulting for business and management; research in the areas of social and human sciences; recruitment and selection of personnel; market research.

Another collaborating institution was Explore Iberia, a family-owned independent tour operator, with more than 20 years of guiding tours in the North of Portugal, the Azores, and Galicia. For Explore Iberia, travel means really getting under the skin of a country, closely and authentically experiencing its traditions and customs, living meaningful moments, and getting to know its culture up close. (Explore Iberia, n.d.).

The TOOBRA (Touristic Offers Over the Beautiful and Rich Alto Alentejo), is a tourist entertainment company created with the objective of providing a type of tourist entertainment that would serve the entire region of Northeast Alentejo. The company was founded on sustainable ideals, as a preponderant pillar for the success, quality and competence of its services, as well as, its economic, social and environmental responsibility as an agent and promoter of sustainable tourism (TOOBRA, n.d.).

Agroturismo Xistos, operating in accommodation and agriculture experiences, seeks to encourage the valuing of life and nature, but also appreciate biodiversity. By implementing sustainable practices in the business approach through Responsible Tourism. With the objective of adding to the entire ecosystem, passing through Fauna, Flora, Community and Territory, among so many others. Xistos is a dynamic and continuous challenge due to it bets on the three pillars of sustainable development, the economic, the social and the Environmental (Xistos – Agroturismo Xistos, n.d.)

Escola de Hotelaria e Turismo do Oeste, is a training school in tourism and accommodation, that integrates a network of 12 schools from Turismo de Portugal, leading human resources training for tourism sector, assuring the preparation of young for the first job and the qualification of the professionals in this sector, in order to improve the quality and recognition

of touristic professions. In January 2018 the OMT distinguished Turismo de Portugal schools training projet – known by Tourism Training Talent - with the first place in the Innovation and Public Policy category during the 14th edition of the UNWTO awards, for its example of training of future generations of human resources in the sector. Finally, Geonatour is dedicated to Nature Tourism, Geotourism and geological consulting. And it provides information that values the natural and historical-cultural heritage of the territories worked. In addition, Geonatour offers a set of geotourism experiences and has a geological consultancy strand, which provides specialized services in various areas of geology and environment, with emphasis on geology, geotechnics, slope stabilization, Quarry Plans, landscape recovery, Geological and Geophysical Cartography and Environmental Impact Studies or environmental incidents (Geonatour, 2023, February 23).

Questionnaires were sent to the focus group participants, and 2 responses were received, from professionals in private-sector organizations. Regarding the sustainability topic, the participants suggested as actions that the organizations would be implemented to make tourism practices more sustainable: biodiversity conservation; actions to tackle/mitigate climate change and promoting social inclusion. Moreover, the participants considered social sustainability actions as a priority: measures that facilitate the transition of workers from the informal to the formal economy; ensure safety in the workplace; ensure maternity protection; Integration of migrants into the tourism labour force; promote a general environment of zero tolerance of violence and harassment and including gender-based violence.

In order to revitalize the tourism sector, the participants mentioned the following actions/measures that should be implemented: skills, education and training; competitiveness; involvement of local communities; safeguarding of the health of residents and visitors; and digital transition and smart technologies (e.g. open data).

Regarding the skills and ability theme, the participants believe that: focus on the client; technological and digital capabilities; flexibility and adaptability; ability to work in a team and commitment to work are the most important for people who want to work in the tourism sector.

Additionally, the promotion of environmentally friendly activities and products; the ability to minimize the use and maximize energy and water efficiency consumption; the ability to manage waste, waste water, recycling and composting; conservation of biodiversity; and promoting activities involving local partners were the environmental skills which should be implemented to improve the competitiveness of tourism systems. Meanwhile, the digital skills were operating system usage and computer programming skills; online marketing and communication skills; desktop publishing skills (for designing brochures, catalogues, etc.); and data analytics, business intelligence, and Big Data skills. Regarding soft skills, the participants considered as the most important to be improved: exploratory thinking; emotional intelligence; idea pitching (the art of presenting); learning how to learn; and customer service.

Branding strategy development; marketing strategy development; corporate social responsibility and business strategy development were considered the areas of entrepreneurship in which participants should have their skills improved.

The inquired also considered as the most effective way for training a tourism professional: face-to-face training; the use of learning-by-doing and through tutors at work.

For the participants, the approach to project management in their organizations were defined as flexible and innovative, able to adapt quickly to change with versatile strategies and targeted interventions ('agile' approach); but also holistic, i.e. combines some or all of the previous approaches ('hybrid' approach).

Regarding the project management methodology (principles, tools and techniques used to plan, execute, and manage projects) the participants quote as not familiar with the following terms or methodology: Hybrid Methodology; green PM Methodology; Scrum Methodology; Project Management Body of Knowledge (PMBOK); critical Path Method (CPM); critical chain Project Management (CCPM); Kanban Methodology; extreme programming (XP); Lean Methodology; Six Sigma; and PRINCE2.

The participants strongly agree that a hybrid project manager, able to implement planning effectively but also to adapt quickly to changes, is considered a competitive resource for tourism businesses and public bodies responsible for tourism policies. Their organizations include in their organizational chart an official job position entitled "Project Manager". Additionally, both participants agreed with the statement "My project management skills are satisfactory." However, they don't have any certification in project management. But, they are interested in attending a free training course entitled "Sustainable Hybrid to improve my existing knowledge.

In order to optimize the interviews, some questions considered most important for the identification of labour market needs in the tourism sector were selected. Initially, the focus group was asked which changes in tourism, on a global scale, were considered most important in recent years.

For this question, we highlighted aspects such as price reduction with the entry of low-cost companies, which allowed more trips to be made to more distant destinations; the duality of the massification of travel by large companies against the trend of customization and sustainability of travel; post-pandemic evidenced the difficulty in hiring and attracting talent; the difficulty of loyalty of people to the sector, and the criteria that influence the consumer's decision on the travel destination by the concern with health and safety conditions.

As for regenerative tourism as an applicable practice, the participants believe that the concepts related to regenerative tourism have been used in several areas as in the case of regenerative agriculture, sustainability, and the fight against the effects of climate change. The participants

highlighted that regenerative tourism makes a difference in offering tourism products and services to domestic and international customers.

Another question to the participants was whether they considered that there was already any training offered for regenerative tourism and if this was already a topic addressed in universities or training entities for professionals. In this sense, the participants believe that there is training in this area, but, with this designation. However, the contents associated with this concept are widespread in other training courses. The theme of sustainability is inserted in all training courses at various levels. Although they still point out the need to have more training offers and that it should be a component of the student's professional training.

The participants were then asked which skills they consider important and lacking in the labour market associated with regenerative tourism and sustainable tourism. The participants believe that regenerative tourism is a big trend. But, in the corporate environment, there is still a lack of information and awareness about this issue, as well as a lack of a more holistic view of Tourism as a whole and its associated activities, as they are too focused on their business and profitability. The post-pandemic brought other challenges and a change in focus, which ended up putting issues associated with sustainability and regenerative tourism in second place.

On the other hand, they pointed out that teaching and training, from polytechnics and universities, should focus on training in which future tourism professionals are more versatile. That is, to transmit the idea of the various dimensions and opportunities of the tourism sector in which they will be able to work.

Another point mentioned was the motivational issue and passion for the tourism sector, in which it is necessary to have a taste for learning and sharing experiences with tourists. With this motivation a person, even without a tourism background, can work in the sector.

We asked which professional profiles the participants considered most in demand in the future of tourism and which competences should be developed or are most necessary for the future of tourism. The participants affirmed that skills related to both the digital transition and the climate transition are needed, i.e. that address issues associated with the environment and technology.

Another issue addressed was the lack of professional motivation in the sector, which may be associated with a lack of professional ethics. It is necessary to have ethical competence, which is fundamental in the sector.

In this context, it was highlighted that technical skills, transmitted during training, are important, but so are soft skills. Some participants commented about the effort that many tourism schools in Portugal have dedicated to adapting the training curricula to increase the inclusion of soft skills. However, a negative reaction from students is observed, as they believe that they are losing hours of theoretical classes or technical skills. And that the use of new

teaching methodologies but active and interdisciplinary availability, as an incentive to teamwork, could solve such questions.

Regarding the proposal of the new profile of a hybrid project manager focused on the tourism sector, the participants were asked their opinion about the profile and what will be necessary for its implementation. The participants understand that besides the competencies associated with management, this professional must also have the ability to adapt. In a context of constant change in the sector, he or she will need to have a holistic view of the whole work and deal with issues such as sustainability.

As for the competencies required for this new profile, the participants believe an increase in awareness, information and ethics in the sector is necessary. Other competencies such as creativity, innovation, and leadership were mentioned. For the hybrid manager profile, it would be necessary, besides motivation, a strong artistic component, with training in the arts, in order to make these professionals more tolerant and respectful of others and the environment. Other aspects such as freedom of thought, sustainability and finance should be explored in the training programs to prepare students to deal with certain situations in the labour market.

Finally, regarding what can be improved in the training for the hybrid project manager profile, the participants stated that continuing education is essential. Both professionals and trainers need to keep up with the evolution of the market and future trends.

### **4.3 Secondary (qualitative) research: The Desk Research**

Our desk research was used as a tool to gather general information and prepare the focus group for qualitative user research. Using this technique got the first idea of our current challenges in the Portuguese labour market and the training necessities. The secondary research was developed by consulting published materials in reports, articles, or similar documents.

Regarding the best practices, the participants quoted some examples of initiatives developed at the national level. However, they highlighted that one of the best practices is the work itself, being in the job market and learning the basics of the sector. Besides the need to strengthen interpersonal relationships in order to know the student's profile to better orient him/her in the labour market.

In this sense, in March 2023, the agenda for qualifications was launched, namely the Atlas program. This initiative is similar to a loyalty program that occurs in companies to attract customers. However, the Atlas program would work as a loyalty program with a set of benefits for those working in the tourism sector, as well as seeking to attract people.

Another initiative mentioned was the creation of the project Companies Tourism 360 by Tourism Portugal, dedicated to training and consulting with companies to work on ideas of sustainability based on the European benchmark for sustainability. This project is inspired by a work methodology that has a European scale with the 360 companies benchmark in which the three main pillars are worked: social, environmental, and economic.

The Companies Tourism 360° project is inserted in Pillar 4 - P4.4 Sustainability in Companies and Destinations - of the PRT. The goal is to accelerate the process of incorporating Environmental, Social and Corporate Governance (ESG) indicators in the respective organizations, challenging companies to actively rethink their environmental, social and governance practices. The focus is on developing actions that include building the capacity of tourism companies to incorporate ESG indicators into their management processes, providing monitoring tools, and sustainability reporting templates and promoting public recognition of organizations (Turismo de Portugal, 2023, January 19).

The third practice cited was the projects developed by Agroturismo Xistos with the objective of valuing the rural reality and the social component, using tourism as a message and communication tool. Highlighting ideas associated with tourism as the valorization of agricultural production, sustainability, efficient use of water, forest resources, and energy efficiency. Another case mentioned was the Escola de Hotelaria e Turismo do Oeste which has been working on the contents of regenerative tourism, in partnership with Agrobio (Associação de Agricultura Biológica Mercado de Óbidos e de Caldas da Rainha) to work on training content available in the digital academy e-learning course. This course makes the connection between Tourism and organic agriculture and thus develops the idea of the regeneration of attitudes and behaviours as well as the regeneration of tourism and food products.

Finally, the participants highlighted the creation of the digital academy of Tourism Portugal and all the hotel schools at a national level, which has made an effort to verify the formative offer of courses in short and medium duration.

The Digital Academy is focused on promoting the development of people and the empowerment of companies. Created by Turismo de Portugal, the Digital Academy is aimed at those who want to do training, access workshops and seminars, or even subscribe to tailored training services provided by the 12 Tourism Schools of Portugal.

This new platform will manage all executive training provided by Turismo de Portugal and its Schools, facilitating access to users. This new solution aims to facilitate access to information and contribute to improving the training experience and, above all, the knowledge acquired.

It is important to highlight that since the beginning of 2020, Turismo de Portugal organized a total of 567 online training actions for 56.094 participants. In 18 weeks, 168 certified online executive training courses were delivered to 7.624 participants, 145 Clean&Safe training courses to 23.130 participants, online consulting was given to 359 companies and 256 Best Live





Online Training courses were promoted to 25.340 participants (Turismo de Portugal, 2020, October 9).

## **5. Conclusions and Recommendations**

The conclusions obtained are very relevant and aligned with the scope and objectives of the project, moreover, may provide relevant clues for its development.

The research was based on professionals' feedback who have a great or extended experience in their fields and reliable sources in the field of project management and sustainable tourism.

In relation to sustainability issues, all actions related to biodiversity, climate change mitigation, circular economy development and to a lesser extent improving governance and finance and well-being are important, suggesting a holistic approach to sustainability. Additionally, it is evident that for the tourism sector to become sustainable, meeting the companies' goals, mission and values as well as meeting consumer expectations should be a priority, alongside improve operation efficiency and a better reputation. While the aforementioned are considered of great importance, most of the Portuguese organizations active in the tourism sector would follow more social sustainable practices in their daily operations to promote a general environment of zero tolerance of violence and harassment, including gender-based violence and ensure safety in the workplace.

Regarding the skills of professionals, improving them seems to be the most significant driver for the revitalization of the tourism sector and the most important skills for current or future tourism employees are creativity and innovation followed by flexibility and adaptability and focus on client, which indicates the lack of these soft skills at the moment. Communication, change management and exploratory thinking skills should also be prioritized in training offers.

Approaches and methodologies that promote personalization and innovation of tourism products/services are not followed by the majority of Portuguese organizations. While the most in-demand entrepreneurial and digital skills are Business strategy development combined with Marketing strategy, followed by Online marketing and communication skills and Data Analysis skills, the existing skills gap is big.

As far as Project Management skills are concerned, a paradox was observed, especially in quantitative research. Professionals are either not familiar with basic terms and processes related to project management or do not use them to conduct their daily work. However, they consider their project management skills to be satisfactory, while a small number is certified as a Project Manager, and they indicated as the most popular project management approach the hybrid. This paradox showcases that people working in the tourism sector are not aware of what exactly Project Management is and probably they confuse the components of Project



Management with other operational business activities. Furthermore, the majority of Portuguese tourism organizations don't include in their organizational chart the job position of "Project Manager".

About the focus group, the activities developed allowed us to have a more comprehensive view of the labour market needs for the tourism sector. In particular, sharing of the viewpoint and experience of professionals working in the areas of training, consulting, tourism operation and animation, and project partners.

Based on the participants' opinions, it was evident that the tourism sector is very complex and has many facets, and that technical and soft skills are very important, in order to have a more comprehensive and holistic view of the entire sector and its opportunities.

The focus group highlighted the quality of training in Portugal, but that training on the sector's themes could start to be worked on before higher education. And it should be emphasized to students about learning soft skills, which are as necessary as technical skills. Besides increasing the time for practical activities to develop creativity and innovation, and even entrepreneurship.

The participants highlighted the role of the human component in the tourism industry. First, the need to develop strategies to capture and attract human resources to work in the sector, as well as create ways to motivate people. The second would be to work on emotional management and human development. Finally, the need for teaching, at all levels, not only technical skills but also soft skills was reiterated, as well as the inclusion of interdisciplinary content in order to encourage people to think differently.

Finally, as a suggestion, the participants described that linking fiscal or financial incentives to the application of good practices could encourage training in hybrid project management for the tourism sector.

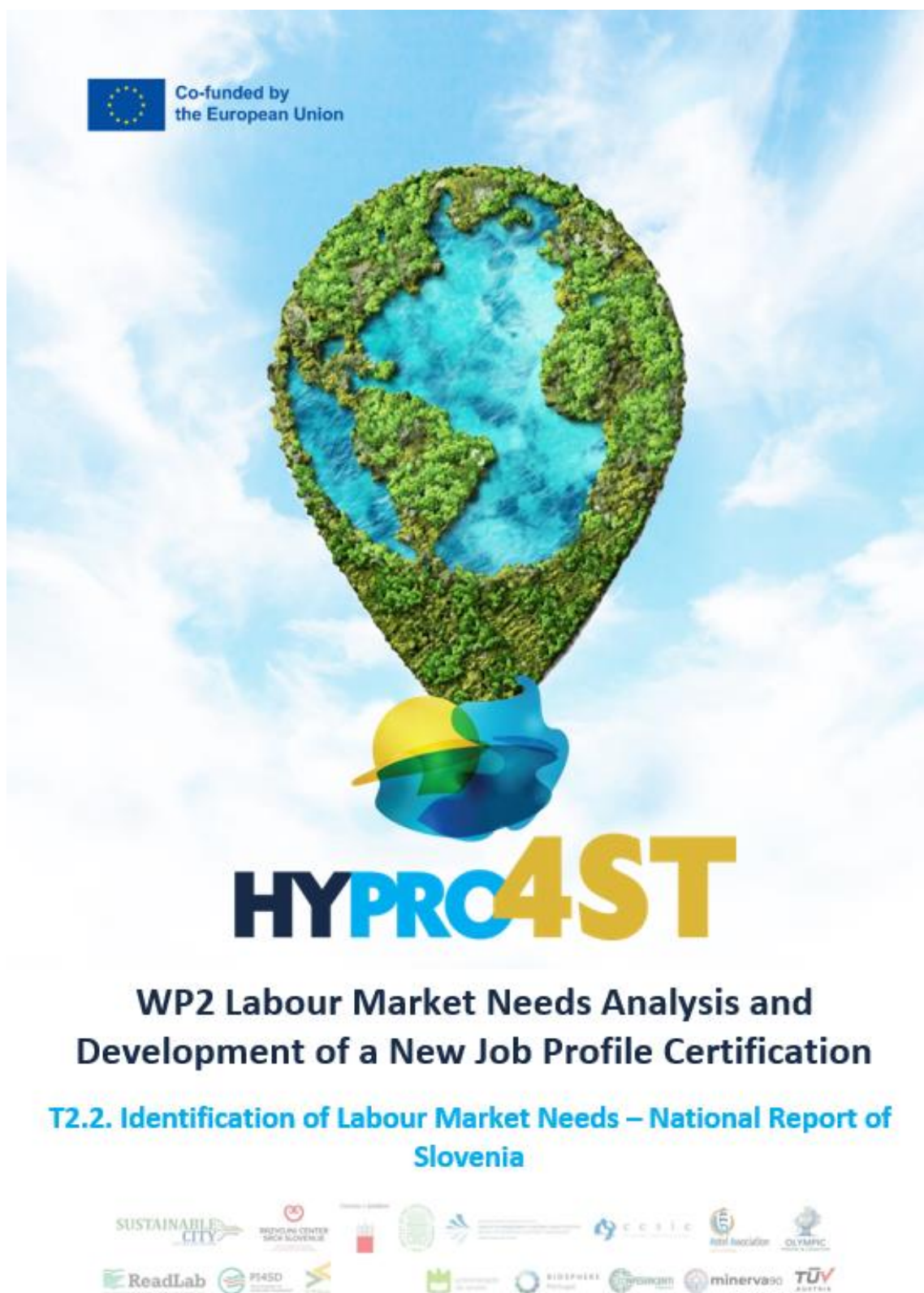
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## **Anexo H. Relatório nacional da Eslovénia**

## **Annex H. National Report of Slovenia**



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## 1. Executive Summary

With different qualitative and quantitative methods, we investigated the new and changing needs for skills in the tourism labour market in Slovenia.

We obtained 51 questionnaires from tourism stakeholders, and current and potential tourism employees showing that in Slovenia, there is a good understanding of the sustainable transition and employees see their and the company's role in it. Less understood is the need for improving digital skills, the common misconception is that digitalisation might bring a loss of human interaction which is key for the tourism experience. Our respondents recognize the value of online marketing skills and data analytics, but the rest of digital skills should be better explained and communicated in future curriculums.

As for the project management and HyPro4ST profile, the survey suggests that even if the company of the respondents have such practices, employees are less familiar with them. Project management is implemented in operations, but there is a need for PM skills upgrade on the level of employees; also there is a high interest from the respondents in the participation in Hybrid Project Manager in Sustainable Tourism course.

Focus group research allowed together with experts to identify the skills which might benefit the profile of the Hybrid Project Manager in Sustainable Tourism, which besides project management and impersonal skills need to cover also multiple skills related to the ability to work with data and information, basic digital literacy and ability to translate the sustainability principles into practice.

Desktop research shows that there is understanding and a lot of activities done in the direction of the digital and green transition, with Slovenia being among the world leaders with detailed strategies for such transition and successful working examples. However, despite all these, there is a need for further scaling up of the innovative solutions, as well as implementing green and digital competencies across all qualifications. The country's tourism industry faces a crisis with the lack of employees and a gap between employees' skills and the needs of the market. Existing formal qualifications do not fully reflect the current expectations of the employers, and at the same time, potential employees do not see tourism as a sphere for a career.

Hybrid Project Management for Sustainable Tourism is not fully reflected within current tourism qualifications but such qualification is getting more relevant due to the increased complexity of tasks and processes within even the smallest tourism companies.



## **2. Introduction**

With this report, we aimed to identify the starting point for the work on the new job Profile of Sustainable Hybrid Project Manager in Slovenia. We review the existing research, policy documents, activities and programmes in the area of education and training of tourism employees with a focus on sustainable, hybrid and digital skills. Moreover, we learn from six focus group members who are experts in tourism in Slovenia, and 50 representatives of the target group of the project – potential or current tourism professionals – about the skill gaps and the anticipated profile of the tourism professional who will be able to tackle challenges of the green and digital transition of the industry.

Our results show that Slovenia has good examples of implementing such practices, though not under one qualification, as our project aims to develop. Lessons learned from the Slovenian tourism industry will be helpful in the development of the new Job Profile.

## **3. Methodology**

The methodology followed was the one proposed by the consortium (as mentioned in the guidelines given).

### **3.1 Primary (qualitative) research: The Questionnaire**

We have used the survey template developed and approved by the project partners. The questionnaire has been translated into Slovenian language and shared among the target group of the project. We asked all project partners from Slovenia to share the questionnaire with their networks and additionally used resources of the Centre of the Business Excellence of the School of Economics and Business, the University of Ljubljana.

We received 51 completed questionnaires (please see Appendix 1 for the detailed report). Our respondents were mostly the representatives of private (40%), public (26%) and educational sector (22%), students, project managers (both 16%) and higher education professors (14%), representing 35-49 age group (53%), mostly female (76%).

### **3.2 Primary (qualitative) research: The Focus Group / The Interviews**

For the semi-structured analysis of the Tourism market needs in Slovenia, we used qualitative principles of conducting research that is a Focus Group (FG). In the FG we included individuals that have either one type of knowledge or all of them combined in the tourism field - academic, educational or practical knowledge through work experience.



In the focus group, there are 6 individuals that not only differ in knowledge and practical experiences but also are from different regions of Slovenian country, thus they know their specific issues concerning the tourism sector.

The individuals in the focus group were first interviewed with a questionnaire, so they could prepare for the round table, develop opinions on issues they came across for the first time, and rethink problems they face in their region or narrower working conditions.

When questioning individuals were selected for the FG, we assigned questions to ones we think have the most knowledge on the issue. We also combined the academic view and knowledge with practical knowledge, thus the gap between theory and practice can be recognized.

Focus Group was informed by email one week before the zoom round table was held. The round table discussion lasted approximately two hours. Every participant was included with specific questions and if he/she wanted to add some thoughts, they were able to do that, since the broad discussion was encouraged and desired.

### **3.3 Secondary (qualitative) research: The Desk Research**

To identify the starting point for the development of the new training programme that would match market needs in skills and competences of tourism professionals, we conducted desk research, focusing on the documents and existing training programmes in Slovenia, which are relevant to the objectives of the HYPro4ST project.

Ten documents were selected and analysed for their relevance to the HyPro4ST objectives. Additionally, we reviewed existing qualifications in the area of tourism and hospitality for listing the skills overlapping with the HyPro4ST profile. Next, we used a combination of desk research and interviews to inform the good practice examples on the existing training programmes covering the topics of sustainable tourism, project management and digital skills. This resulted in 4 good practices, described in chapter 4.4.

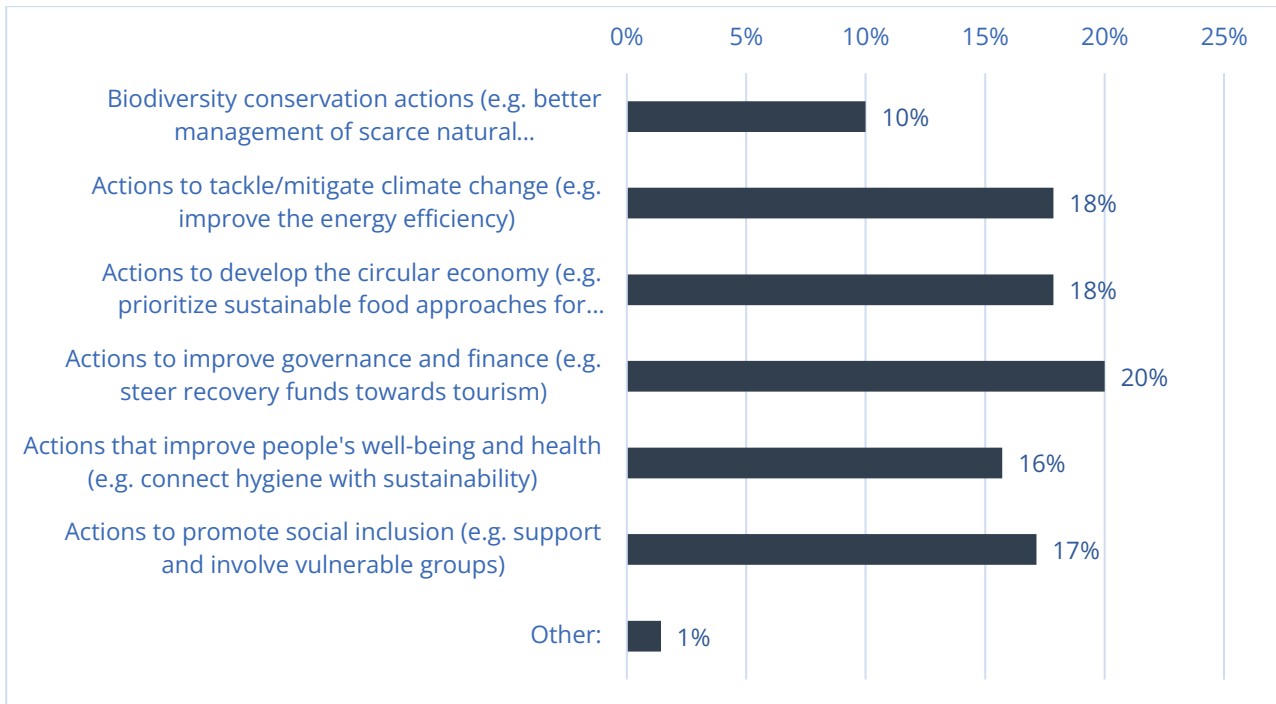
## **4. Results and Discussion**

### **4.1 Survey**

#### ***4.1.1 Sustainability, skills, and training in the tourism systems***

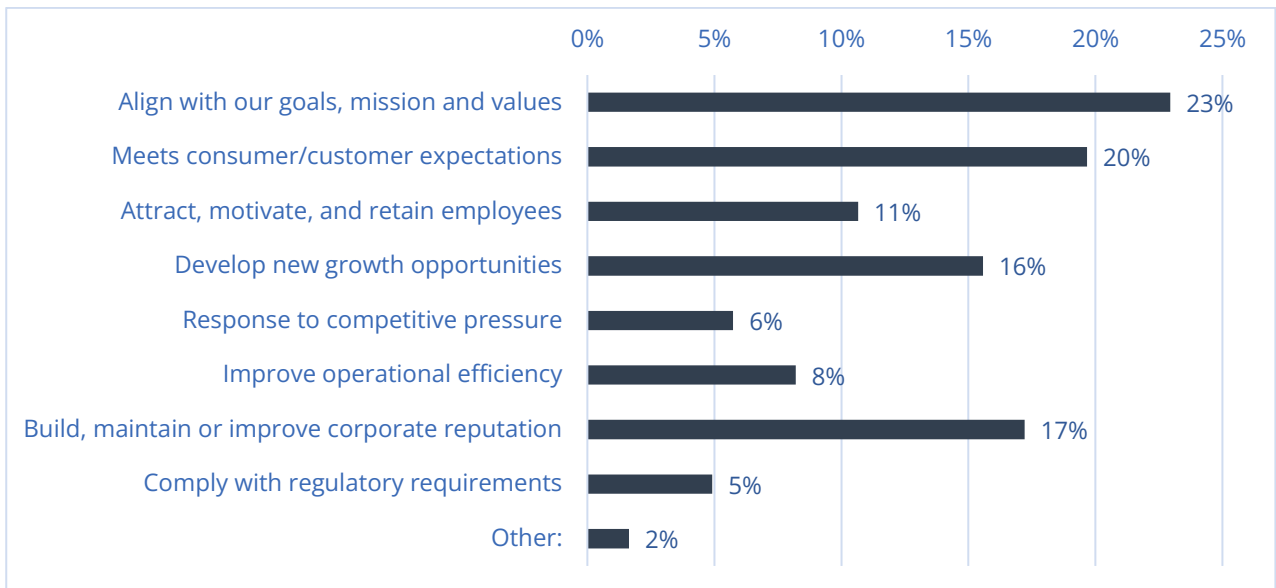
Our respondents agreed that *to make tourism practices more sustainable* (Figure 1), organisations should implement actions to improve governance and finance (e.g. steer recovery funds towards tourism) (20% of respondents), followed by actions to tackle/mitigate climate change (e.g. improve the energy efficiency) (18%) and actions to develop the circular economy (e.g. prioritize sustainable food approaches for circularity) (18%).





**Figure 1. What concrete actions should your organization implement to make tourism practices more sustainable?**

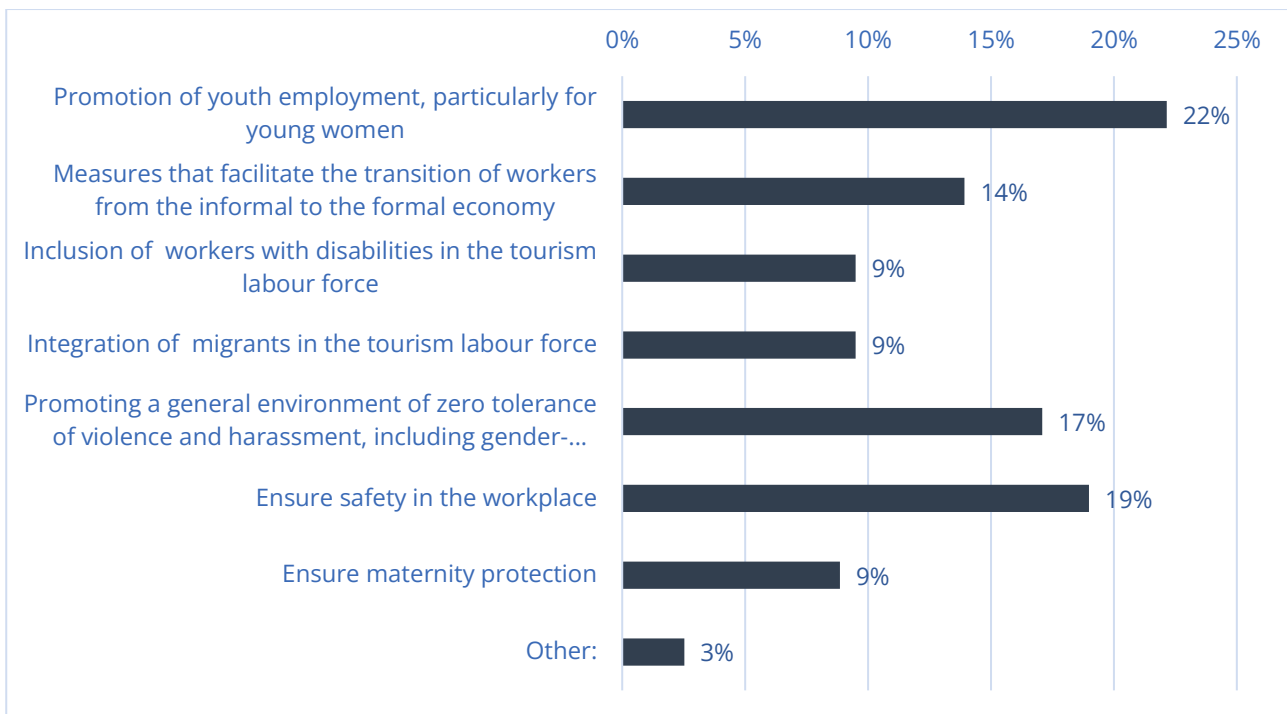
As for the reasons *why organizations address or could address sustainability issues* (Figure 2), the majority selected aligning with goals, mission and values (23%), followed by meeting customers' expectations (20%) and building, maintaining or improving corporate reputation (17%).



**Figure 2. What do you think are the reasons why your organization address or could address sustainability issues?**

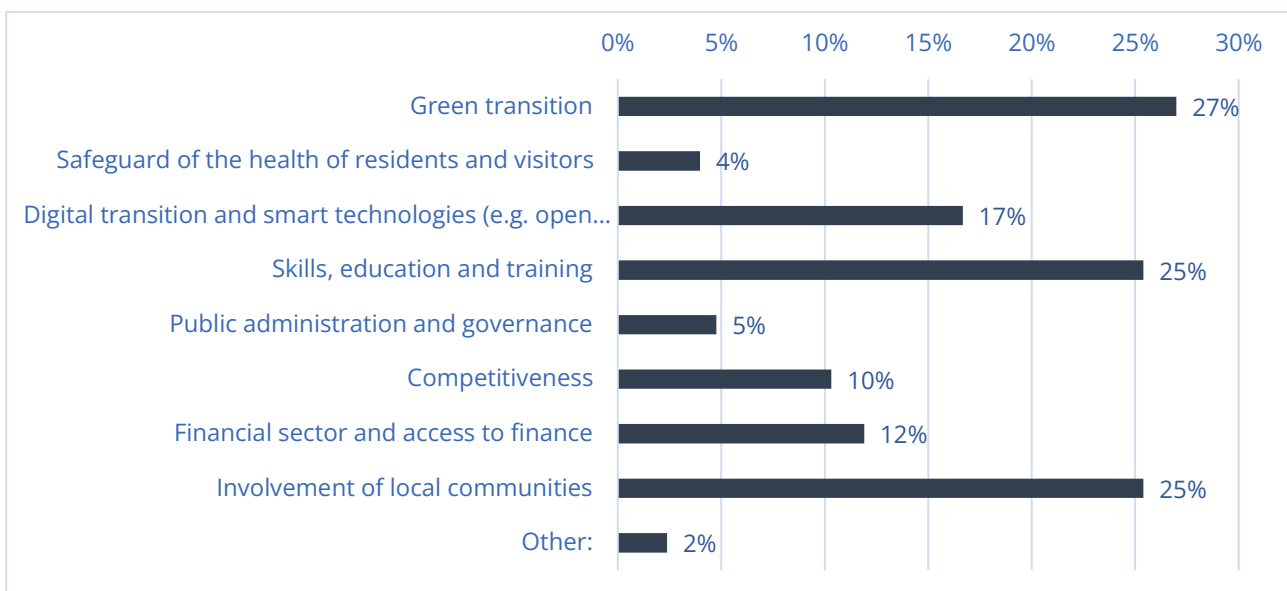
For *social sustainability* (Figure 3), respondents prioritized the promotion of youth employment, particularly for young women (22%), ensuring safety in the workplace (19%) and promoting a

general environment of zero tolerance of violence and harassment, including gender-based violence (17%).



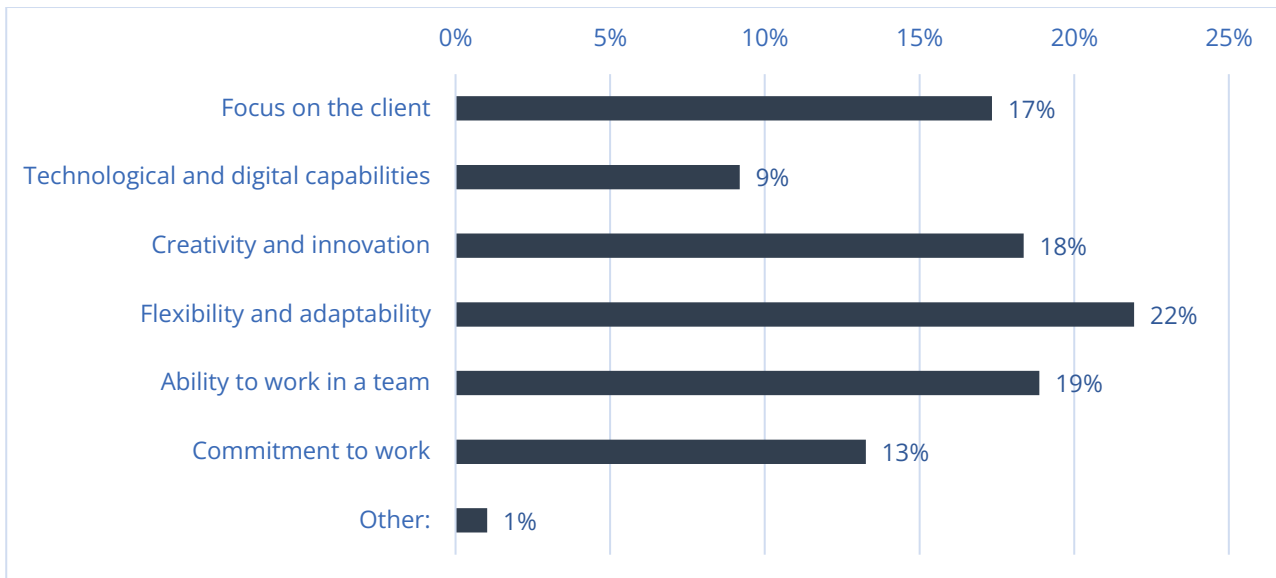
**Figure 3. Which of the following social sustainability actions should be considered a priority?**

To *revitalize the tourism sector* (Figure 4), green transition (27%), skills, education and training (25%) and involvement of local communities were named crucial (25%).



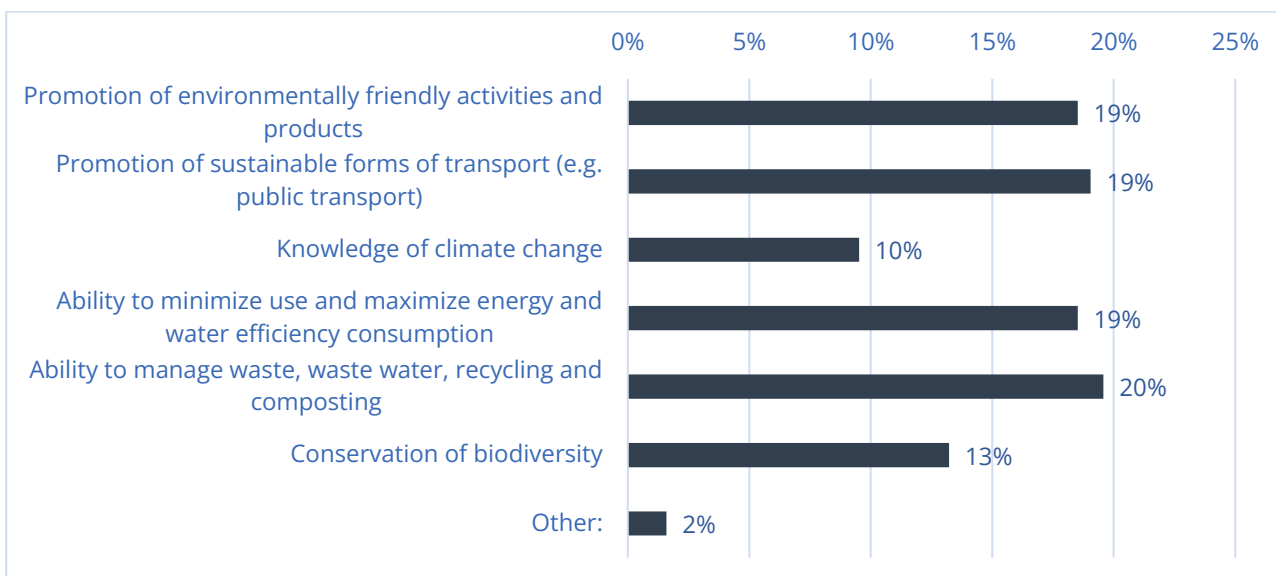
**Figure 4. Which of the following actions/measures should be implemented to revitalize the tourism sector?**

The most important *skills and abilities for people who want to work in the tourism sector* (Figure 5), are flexibility and adaptability (22%), ability to work in a team (19%) and creativity and innovativeness (18%).



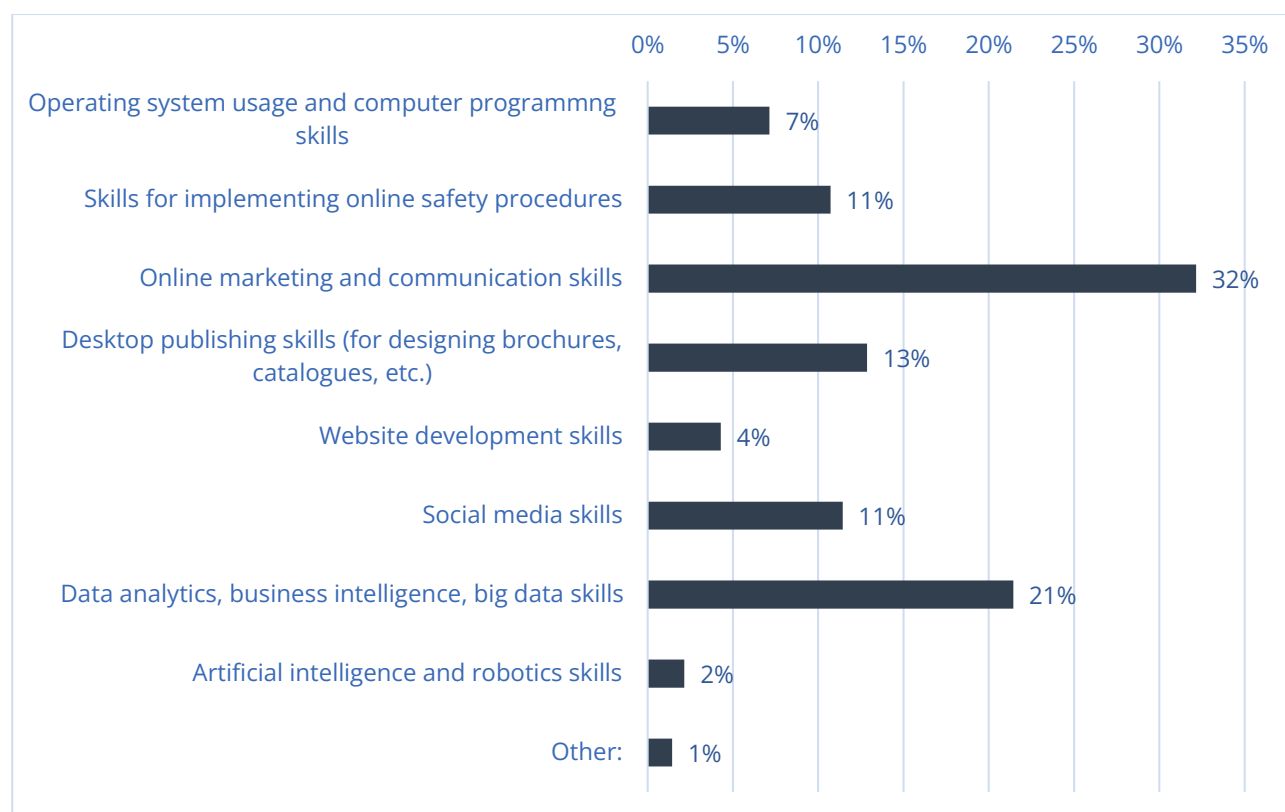
**Figure 5. Which of the following skills and abilities are the most important for people who want to work in the tourism sector?**

To *improve the competitiveness of tourism systems* (Figure 6), the following environmental skills should be implemented: the ability to manage waste, wastewater, recycling and composting (20%), the promotion of sustainable forms of transport (e.g. public transport) (19%), promotion of environmentally friendly activities and products, and ability to minimize the use and maximize energy and water efficiency consumption (each 19%).



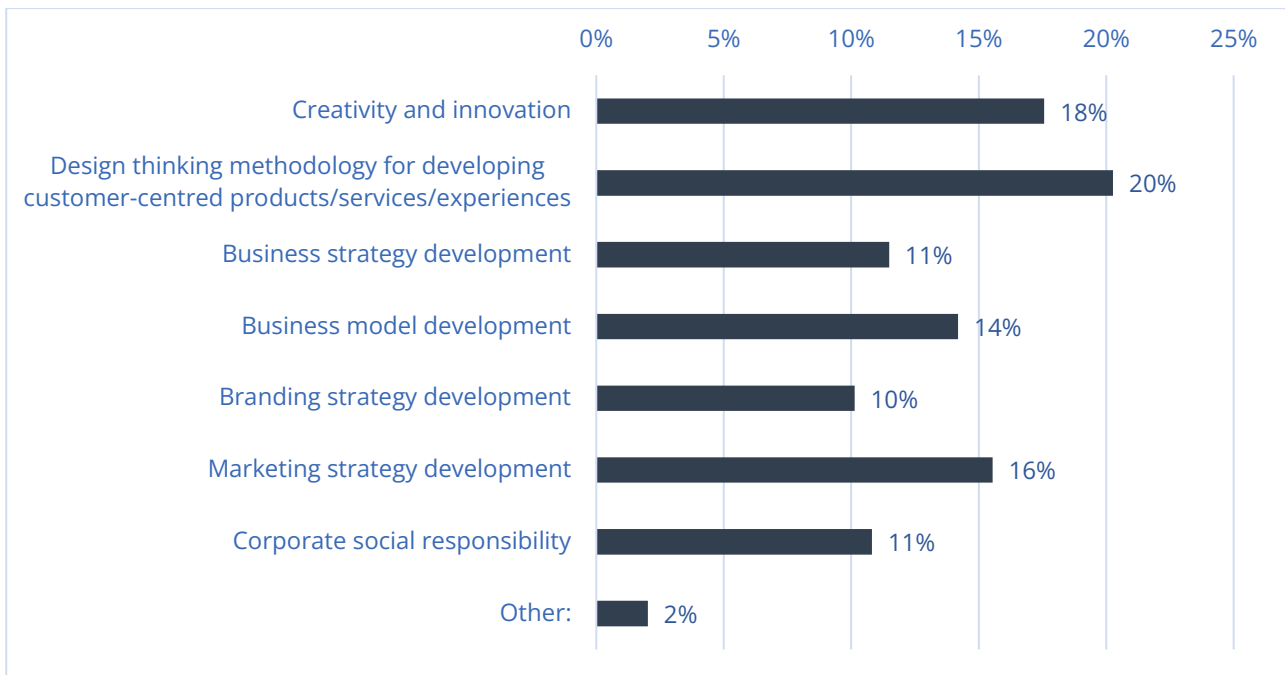
**Figure 6. Which of the following environmental skills should be implemented to improve the competitiveness of tourism systems?**

The most crucial *digital skills* (Figure 7) are online marketing and communication skills (32%), data analytics, business intelligence, big data skills (21%), and desktop publishing skills (for designing brochures, catalogues, etc.) (13%).



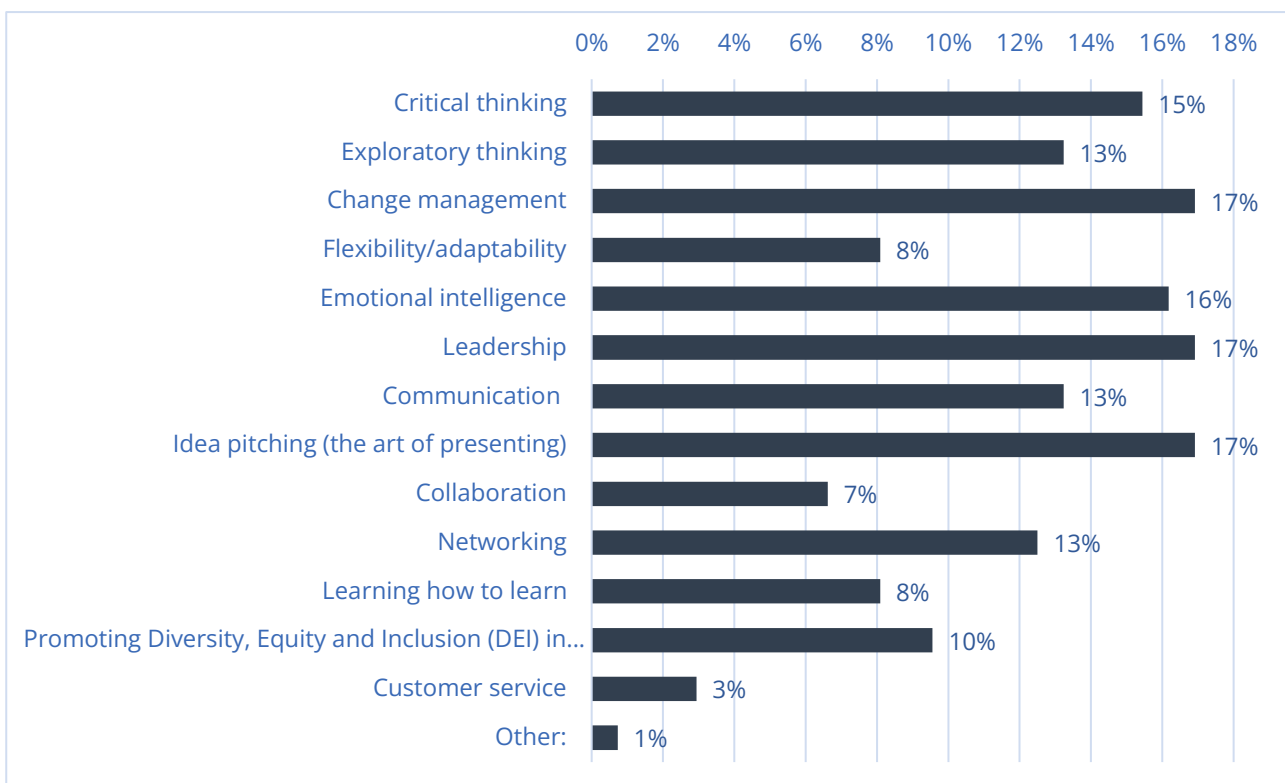
**Figure 7. Which of the following digital skills should be implemented to improve the competitiveness of tourism systems?**

For *entrepreneurship skills* (Figure 8), respondents mostly noted: design thinking methodology for developing customer-centred products/services/experiences (20%), creativity and innovation (18%), and marketing strategy development (16%).



**Figure 8. In which of the following areas of entrepreneurship would you like to improve your skills?**

As for the *soft skills* (Figure 9), change management, leadership and idea pitching were the most commonly noted – by 17% of respondents each.

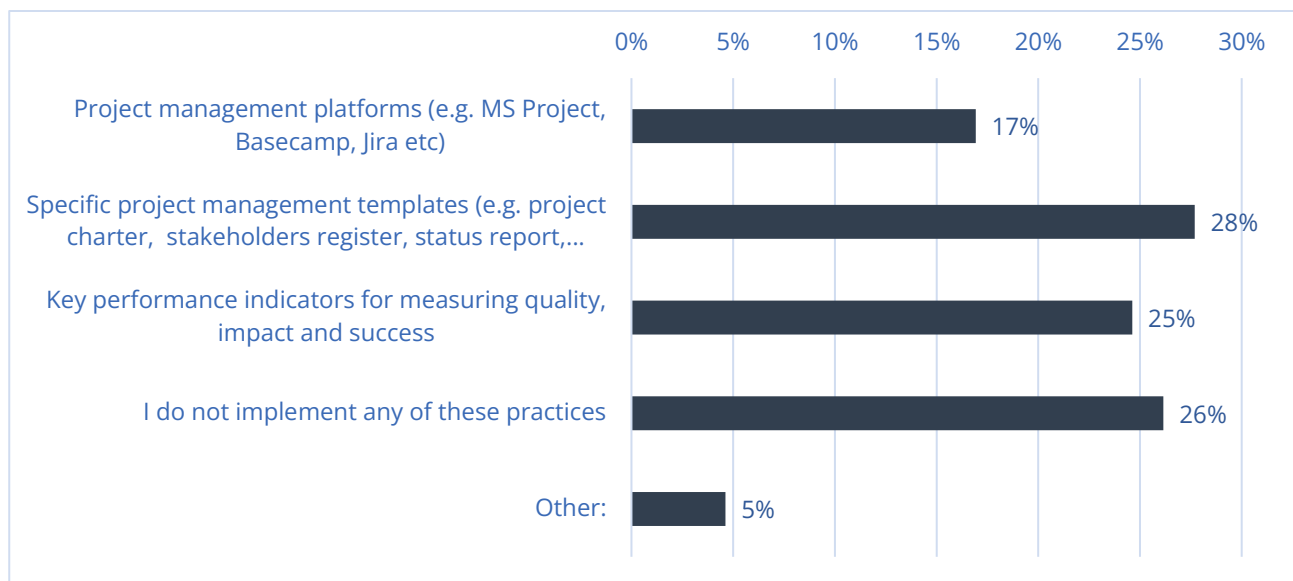


**Figure 9. Which of the following soft skills do you think you need to improve?**

The most effective forms of training for tourism professionals are face-to-face training, through tutors at work, and learning-by-doing – each noted by over 15% of respondents, while the least favoured option was online training (5%) (Appendix 1).

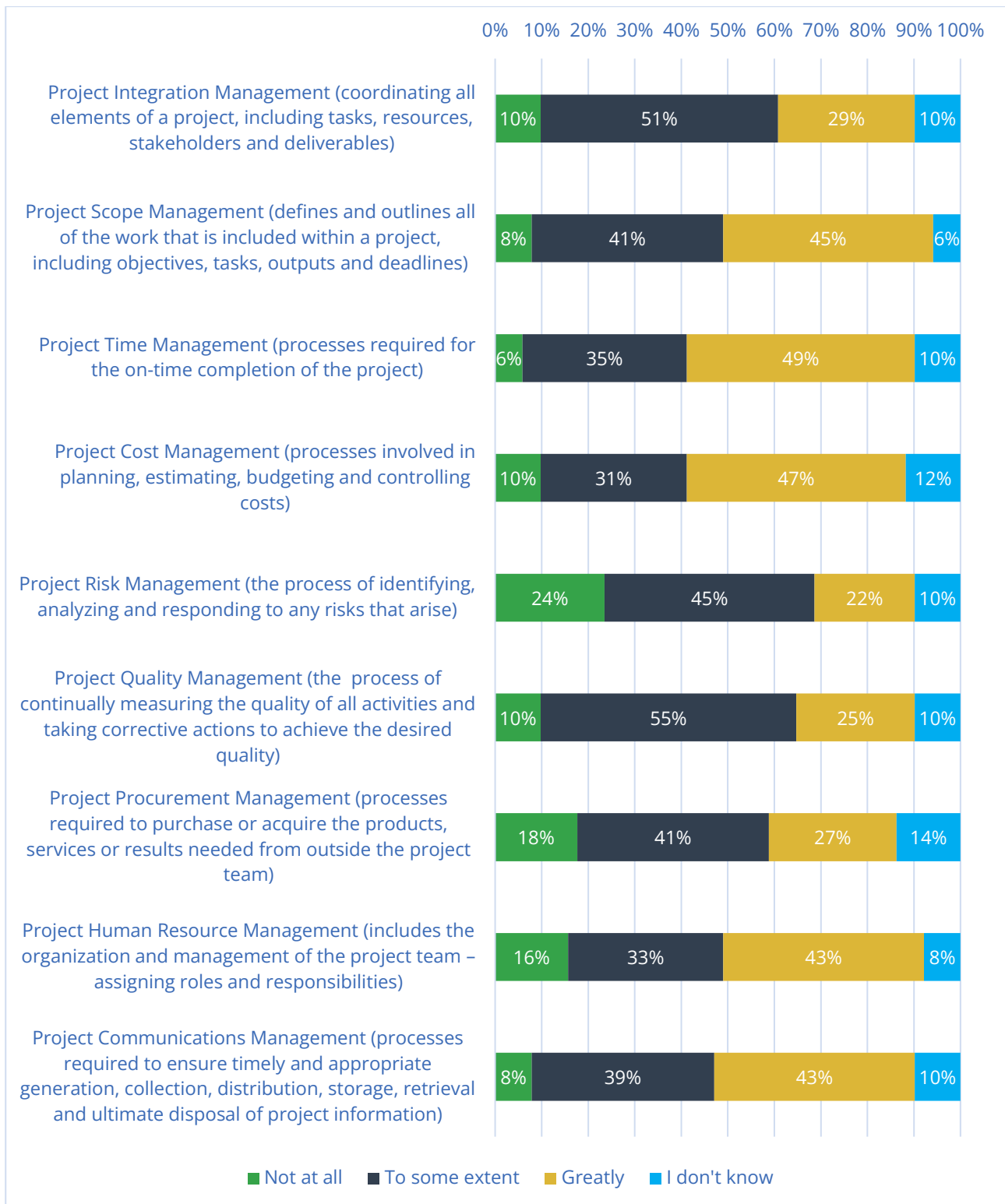
#### 4.1.2 The Hybrid Project Management Profile

Our survey indicates that a significant number of respondents utilize specific templates (28%), key performance indicators (25%), and project management platforms (17%) for their daily tasks, while a large number (26%) do not implement any of these practices (Figure 10).



**Figure 10. Which of the following practices do you use to perform your daily tasks?**

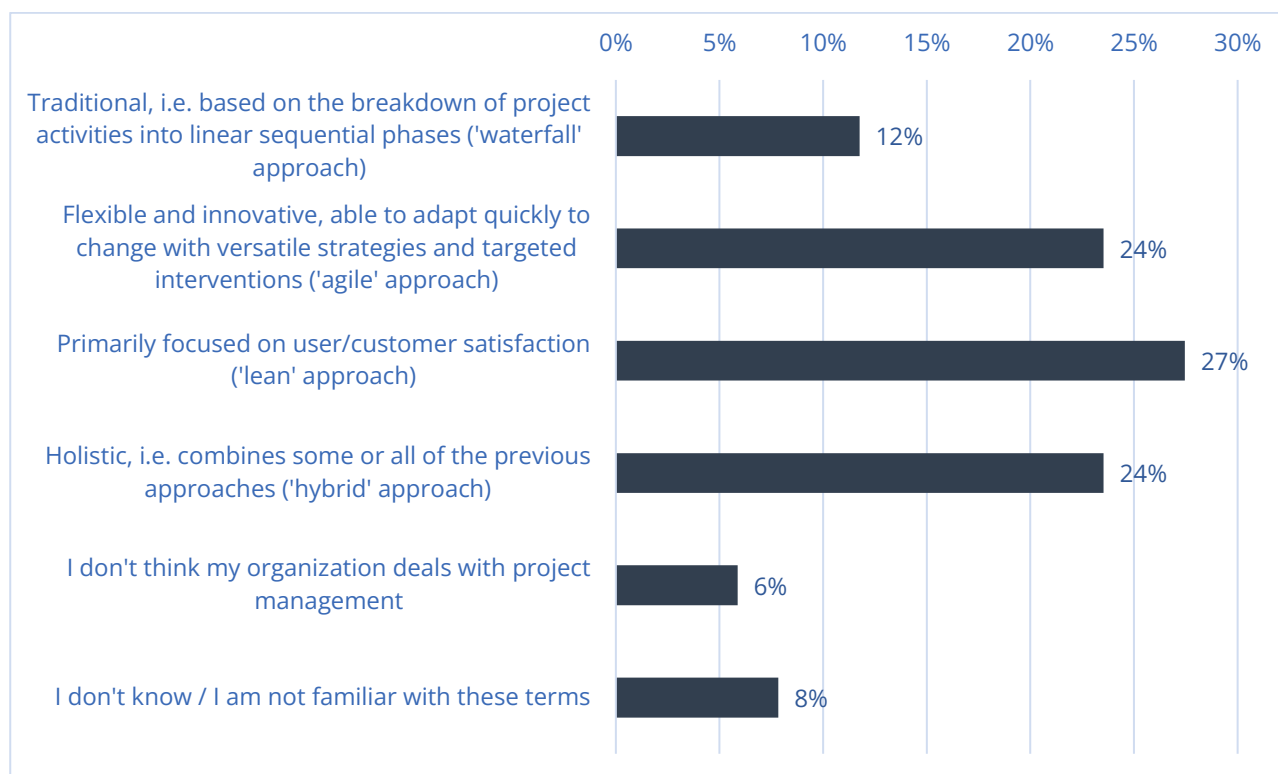
We offered respondents to mark to which extent they use the following processes to implement projects and/or perform daily tasks (Figure 11). The most used were the Project Time, Cost and Scope management. Project Procurement Management was the least known to the respondents. The least used was Project Risk Management (the process of identifying, analyzing and responding to any risks that arise).



**Figure 11. The extent to which respondents use the following processes to implement projects and/or perform daily tasks, number of respondents.**

The respondents agreed that it is more beneficial for a tourism business to be flexible, manage change and follow the market than to apply medium-long-term planning. Around a quarter of respondents stated that their organisations use the following approaches to project management (Figure 12):

- Flexible and innovative, able to adapt quickly to change with versatile strategies and targeted interventions ('agile' approach)
- Primarily focused on user/customer satisfaction ('lean' approach)
- Holistic, i.e. combines some or all of the previous approaches ('hybrid' approach).



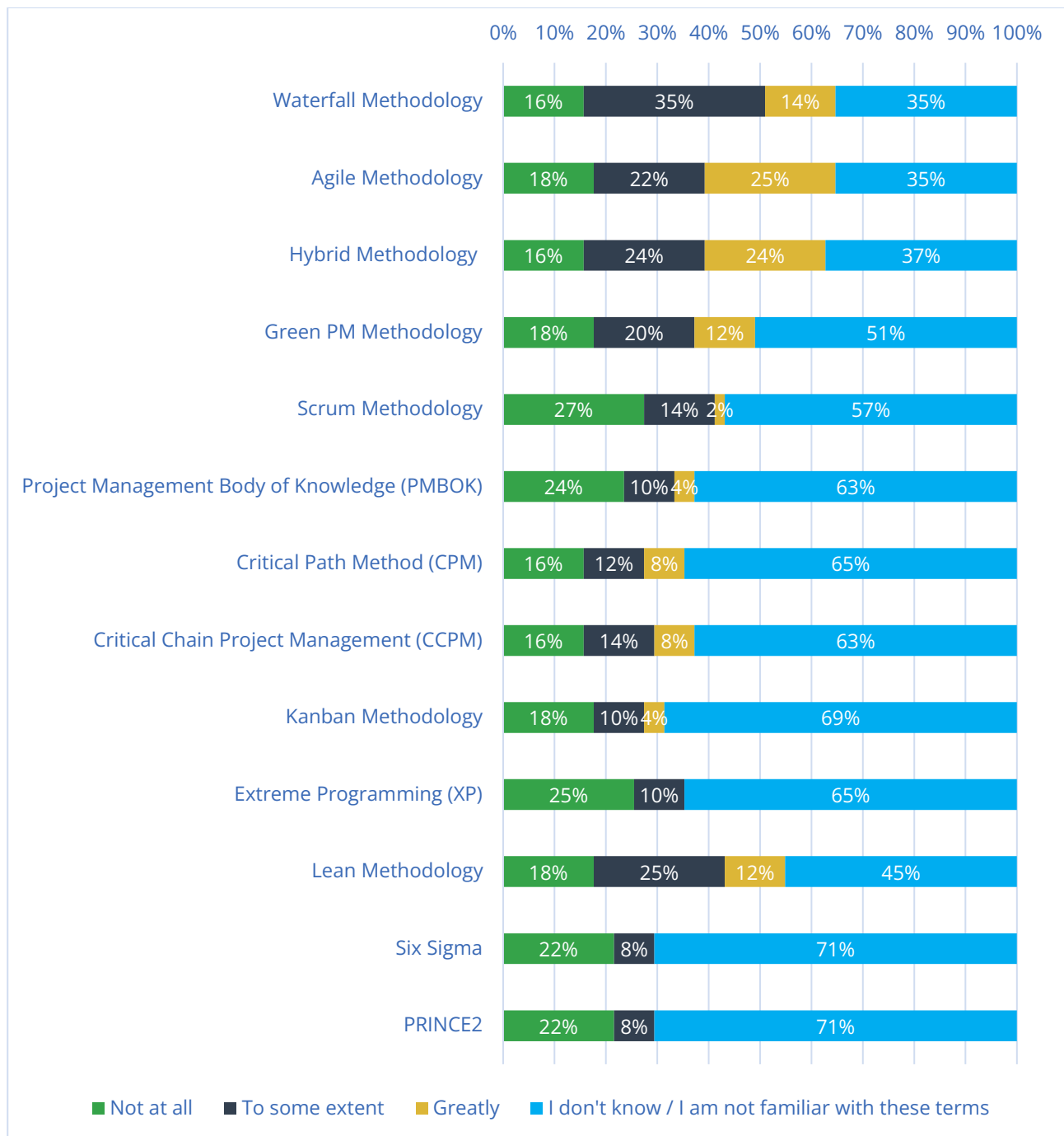
**Figure 12. The approach to project management (i.e. the use of specific knowledge, skills, tools and techniques to deliver something of value to people) in the organisation.**

For daily operations, organisations use to some extent or greatly the waterfall methodology, agile, and hybrid methodology, however, there is a large number of respondents who are not familiar with any of the listed approaches (Figure 13).

A *hybrid project manager* should be able to implement planning effectively but also to adapt quickly to changes, and be considered a competitive resource for tourism businesses and public bodies responsible for tourism policies. However, only half of the respondents' organisations include the official job entitled "project manager". Forty-five per cent of the respondents *do not consider their project management skills satisfactory*, while only 16% have a project management certificate. This also explains a high interest in a free training course on "Sustainable Hybrid



Project Management for the Tourism Sector” (84%) with the majority stating that they *want to improve my existing knowledge* (72%). More details are in Appendix 1.



**Figure 13. Project management methodologies used in implementing projects/day-to-day operations, number of respondents.**

Table 1. Summary of the survey results

Sample description		Survey results	
<b>Analysis of data collected through questionnaires</b>	<p>The sample included representatives of different sectors (private, public, non-governmental, educational) a diverse jobs and roles. Most of our respondents were females. To recruit participants for the survey, we prepared and shared with our institutions and personal networks the invitation to participate in Slovenian. The data collection lasted from 15.03.2023 to 5.05.2023. The sample is not representative, however, thanks to the diversity of participants and their backgrounds allows us to gain insights into the current state of the labour market in tourism in Slovenia.</p>	<p><b>About the value of sustainability in tourism.</b></p>	<p>Respondents recognize the value of sustainability for the tourism businesses and that the principles should align with businesses' goals, values and mission. Less recognized is, however, the motivation for a sustainable approach as a response to competitive pressure. In terms of social sustainability, the most supported measures at the company level were youth employment support, safety at the workplace and zero tolerance for violence and harassment. Green transition and local community involvement are seen among key measures for the revitalization of the tourism sector. Among the crucial sustainability skills, respondents chose more practical and tangible options, such as the promotion of environmentally friendly products and activities, sustainable mobility, energy, water efficiency, and waste management.</p>
		<p><b>About the tourism labour market, skills and training in the tourism sector.</b></p>	<p>Skills, education and training are recognized as key to the tourism industry's recovery. Among the most important personal/work-related skills flexibility and adaptability are standing out, most likely, as a result of the recent crisis. Digital skills are seen by respondents as less crucial, judging from the number of respondents supporting each option, however, there is a general recognition of the importance of online marketing and communication skills (88%) and role of the data analytics, business intelligence and big data skills (58%). Respondents were interested in the design thinking method for product development, creativity and innovativeness skills upgrade. As for the soft skills, the list of skills offered in our survey was supported by respondents, however, fewer respondents stated that they need to improve flexibility, collaboration, learning how to learn and customer service skills.</p>

		<p><b>About the Hybrid Project Management profile.</b></p>	<p>Our respondents are somewhat used to project management practices in their work, however in their traditional form, such as the use of key performance indicators and project management templates. Fewer respondents use digital tools for such processes, and a significant number – around one-third – do not implement any PM practices. The majority were able to name the project management approach that their organisation uses, however, when it comes to particular approaches, all but waterfall, agile, and hybrid PM approaches were not familiar to the majority.</p>
		<p><b>Final considerations</b></p>	<p>With this survey, we explored the knowledge and needs of existing and potential tourism professionals. The results suggest that in Slovenia, there is a good understanding of the sustainable transition and employees see their and the company's role in it. Less understood is the need for improving digital skills, the common misconception is that digitalisation might bring a loss of human interaction which is key to the tourism experience. Our respondents recognize the value of online marketing skills and data analytics, but the rest of digital skills should be better explained and communicated in future curriculums. As for the project management and HyPro4ST profile, the survey suggests that even if the company of the respondents have such practices, employees are less familiar with them. Project management is implemented in operations, but there is a need for PM skills upgrade on the level of employees; also there is a high interest from the respondents in the participation in hybrid PM skills upgrade.</p>

## 4.2 Primary (qualitative) research: The Focus Group / The Interviews

### 4.2.1 Technical Information regarding the FG

In Table 2 we presented each participant, their profession, work profile and lastly institution or organization they work for.

**Table 2. Profile of participants in the Slovenian focus group**

No. of participant	Profile of the participant	Institution/organization
<b>Participant: 1</b>	Director of the Adventure park GEOSS, Municipal Councilor of the Litija Municipality and president of the Local Community of Vače	Adventure park GEOSS
<b>Participant: 2</b>	Project Manager at the Development Center	Regional Development Agency Zasavje (RDA)
<b>Participant: 3</b>	Project Manager at the Center of business excellence in fields of education, knowledge transfer and tourism consulting	Centre of business excellence - Strategic development innovation partnership tourism (CPOEF - SRIPT)
<b>Participant: 4</b>	Public official of the Slovenian Ministry of Digital Transformation (former project manager at the University of Ljubljana on tourism and former project manager at the Association of Towns and Municipalities of Slovenia)	Ministry of Digital Transformation
<b>Participant: 5</b>	Manager for Accommodation Tourism and Hospitality	Hotel Tabor
<b>Participant: 6</b>	Director Public Institute for Tourism, Culture and Sport of the Municipality of Ormož	Public Institute for Tourism, Culture and Sport of the Municipality of Ormož

Our main aim for selecting the stated participant is tackling the following objectives – practical knowledge of the tourism sector and working experiences with tourists and daily visitors; knowing the specificities of each statistical region in Slovenia (there are twelve statistical regions, so we couldn't include participants from all these regions, see Figure 14); academically



skilled individuals from the field of tourism; the public official who is familiar with the latest policies, good practices and current issues in tourism sector outside and inside the country.

#### **PARTICIPANT 1:**

Adventure Park GEOSS is in the regional centre of the Slovenian country, it is one of the good practices of Sustainable and Boutique Adventurous Experiential Tourism in Slovenia. All materials used for construction are natural, and thus do not harm the environment and its natural ecosystem. Participant 1, as a director of the park, is familiar with tourists, daily foreign visitors and daily local Slovenian visitors. The park also provides one night of experiential accommodations sleeping in the treetops, it is constructed in a way that it does not harm the trees and animals. We believe that he is experienced with the tourism sector, skills, competencies and knowledge needed to successfully promote and maintain the location, thus he also will have experience with what kind of work profiles are needed and what skills, competencies and knowledge they are lacking.

#### **PARTICIPANT 2:**

Participant 2 is Project Manager at the Development Center in RDA, he has many years of experience on project development, implementation and evaluation, also in the tourism field. He is familiar with many issues concerning tourism outside and within the Zasavje region. He has worked on many different projects that equipped him with new knowledge and recommendations for improvement and effective solutions. One of the biggest projects he worked on is Pronacul, whose main aim was to improve management in preserving natural and cultural heritage (Regional Development Agency Zasavje, 2023).

#### **PARTICIPANT 3:**

Participant 3 is an alumnus of the School of Economics and Business, University of Ljubljana (SEB UL). Since she loves to travel and work in an international environment, she started her professional career in the Department for International Cooperation at the SEB UL. She successfully worked in the field of the internationalization of higher education for 7 years. She loves to challenge herself and be outside her comfort zone, so she decided to make a shift and join the Center for Business Excellence (CBE), where she became part of a very creative and energetic team. Within the CPOEF, she works as a project manager for SRIPT t – Strategic Partnership for Innovation and Research in Tourism (School of Economics and Business, University of Ljubljana, 2020).



**PARTICIPANT 4:**

Participant 4 is currently employed as a public official at the Slovenian Ministry of Digital Transformation. She has been with the Ministry (former Government office) since the summer of 2022, before that her employment was as a project manager at the University of Ljubljana and before that position, she was indeed employed as a project manager at the Association of Towns and Municipalities of Slovenia.

Throughout her positions, she was, among other things, very much focused on tourism, since that is her higher education degree. We found her knowledge and experiences as a good foundation for this Focus Group setting up.

**PARTICIPANT 5:**

Participant 5 is currently the Manager for Accommodation Tourism and Hospitality of the Hotel Tabor, located in Maribor. Her previous working experiences and education are strongly connected to tourism, as she has studied at the University of Primorska, Faculty of Tourism Studies Portorož, she received a master's degree in Heritage tourism, further, she upgraded her knowledge at the Linnaeus University as a Tourism and Travel Services Management and Mobile marketing. Her education and years of experience will give us deep knowledge of skills, knowledge and competencies needed in today's conditions.

**PARTICIPANT 6:**

Participant 6 completed his educational career at the Faculty of Arts in Ljubljana, where he graduated as a professor of German language and literature and sociology. During his studies, he furthered his education and training at one of the oldest and one of the best German universities, Heidelberg, where he studied German and Sociology. He left a big mark on tourism, as he was active in Local Tourism Organization (LTO) Prlekija Ljutomer for 15 years, until its abolition. For some time he also held a responsible position as Marketing Director in the Ocean Orchids Group. After that, he was nominated for the director of the Public Institute for Tourism, Culture and Sport of the Municipality of Ormož, where he still works (Prlekija-on.net, 2018).





**Figure 14. Geographical diversity of Slovenian focus group participants (own work)**

#### **4.2.2 General knowledge of current trends in the tourism sector**

The round table staged for FG members took place on 28.03.2023 between 10 am and 12 pm, via »Zoom«. Four out of six FG members participated in the round table, and the other two members were orally interviewed.

We conducted the discussion in such a way that we guided the members through the outlined topics, which were foreseen by the collected literature for the project and previously prepared questions intended for FG.

Since we wanted the members to roughly prepare for the round table, we also invited them to fill out a questionnaire that was intended for the survey.

They pointed out the most important changes in the world of tourism:

Member 5 observes major changes in the field of sustainability and social responsibility, especially from the point of view of the hotel industry, and says: *»In recent years, I have noticed above all that the world has become much more in favour of sustainability and social responsibility. In the foreground is the awareness that it is necessary and worthwhile to be more ethical in the sense of greater respect for the local population, and natural and cultural heritage as well as in reducing the consumption of resources. Increasing information due to the development of digitalization, which enables us to have a deeper and broader awareness through the use of new technologies and new*

*methods of communication, contributed a lot to this. I believe that this is particularly noticeable in the greater respect for natural and cultural resources».*

Member 4 is employed at the Ministry of Digital Transformation and mainly highlighted the national perspective of the changes in the tourism sector. She highlighted the need for the development of digital tools and the need for the growth of platform models, i.e. accommodation facilities or transport and efficient mobility. She believes that digitization will have a wider impact on tourism as well as on the functioning of local communities, so it is necessary to change certain models. Many apartments in cities are dedicated to tourism and the number is growing steeply, consequently, the population is moving to the rural areas. For local communities, this presents many new challenges: ensuring public transport, and sufficient capacities of kindergartens and schools; we are witnessing this all over Europe. Amendments to regulations are being prepared at the EU level, which will regulate and provide easier access to certain data located on existing or future platforms. The awareness of tourists themselves about sustainability, both social and environmental, respect for the local population, and encouraging the desire to experience the destination authentically is also on the rise.

Member 1 the director of Adventure Park GEOSS, also the Municipal Councilor of the Litija Municipality and president of the Local Community of Vače says that as a tourist and as a tourist destination provider, he notices that tourism is changing from "bulky" or mass tourism to a more boutique type. There is a growing interest in getting to know less known and less crowded tourist destinations and the desire to feel the hospitality and uniqueness of the experience. He notices this in his destination – central Slovenia. Tourists increasingly want adventures and experiences, not just lounging at the destination. They are becoming active adventurers, they want to learn about the authenticity of the environment. That is why tourism providers must recognize this and start marketing their destinations in this way. At the same time, the experience with Covid-19 contributed to the fact that there were significantly fewer trips, but they are on the rise again. He also believes that travelling by plane is difficult to accept in the long term and that it is necessary to find new ways and solutions here as well. He sees the advantage of Slovenia in its small size and diversity while emphasizing the importance of developing villages, farms and digital support, which would be very welcome in this area. He is convinced that individuals employed in tourism must master many skills and have a lot of knowledge, but time hardly allows them to find suitable training and complete it. Therefore, any support providing such basic knowledge and skills would be greatly appreciated.

They mainly see outdated infrastructure and long and complex legal procedures as problems in the transition to sustainable tourism.

Member 5 pointed out that when obtaining approvals, due to lengthy procedures, she could not carry out the process towards greater sustainable energy efficiency in time for the winter (and even more so because the hotel is in a cultural conservation area). The problem is an



outdated national infrastructure that needs renovation. Maribor (MB) is a transit destination and when travelling from the north to the south, the destination faces a significant amount of municipal waste (garbage). For several years now, we have been increasing awareness of the importance of recycling and guiding tourists with instructions on how to use garbage cans, despite this, the amount of garbage is increasing. During the summer months in MB, it is necessary to hire additional staff for this purpose.

As an advantage, she points out that the »Visit MB« destination is also certified, as the so-called Slovenia Green Destination, where for some time they have been organizing and raising awareness of the issue with the so-called »Zero Waste« event. More and more providers who have certificates of various sustainability and environmental signs are participating in these events. Offers such as »Stara trta«, which is the so-called SloveniaGreen attraction, the surrounding hills with vineyards, Kozjansko and Pohorje areas, all the surrounding areas and connecting the rural with the urban.

Member 4 considers that the basic component of digitization is data. She says that the Slovenian Tourist Organization (STO) has adopted a new strategy for the period 2023-2027, with the aim of the digital transformation of tourism. A national information point, digitization of the green scheme and other measures are planned, which will be presented at the end of July. The Green Scheme is a system for comparing destinations and determining how sustainable they are. She notes that municipalities and green teams also face data acquisition challenges. She believes that with the digitization of these systems and the greater connection of data, destinations will become easier to recognize, and it will also show where there is a need for improvements and where they are successful. Based on this, appropriate measures can be formulated. The schemes will also be able to encourage the tourist economy to use energy more efficiently. As an example, Member 4 points out a hotel in the EU, where sensors for electricity and water consumption were installed in all rooms, and the receipt for the hotel service also shows this consumption.

Member 1 thinks that the bigger the tourist destination, the greater the challenge of changing it into a more sustainable one. Everything related to sustainable tourism requires time, e.g. the infrastructure needs renovation to a more sustainable and environmentally friendly version, and on the other hand, some individuals do not have the inculcated values of respect for the environment and harmless coexistence with nature. He notes that over a while, the situation has improved, but not to the extent that it is not necessary to further raise awareness among people. He believes that some formal forms of punishment are a suitable way to teach people these values (e.g. monitoring water consumption, and leaving garbage in nature...).

Member 3 notes the following changes: *»Changing travel patterns: travellers are choosing to explore new destinations and participate in different activities such as adventure tourism, wellness tourism and ecotourism.*



*Shift to experiential travel: Travelers are now looking for more travel experiences that provide them with the opportunity to connect with local culture and people.*

*Technological Advances: The travel industry is pushing technology to improve customer experience, optimize operations and streamline processes.*

*Greater emphasis on sustainable tourism: More and more people are aware of the impact of tourism on the environment, society and economy, so tourism stakeholders are working towards sustainable tourism practices.«*

Member 3 is convinced that Slovenia has made great progress in promoting sustainable tourism in recent years. The Slovenian government has recognized the importance of preserving natural and cultural heritage and implements policies and initiatives to support sustainable tourism practices. There are also several eco-tourism destinations in Slovenia that offer visitors the opportunity to experience the natural beauty of the country, while at the same time supporting sustainable tourism practices.

Her personal opinion is that sustainable practices are well covered at the destination levels if we look at the indicator of inclusion in the Green Scheme; however, she sees the challenge on the part of the providers themselves in individual destinations, to find out how to motivate others to join as well.

**With regard to Measures related to Social Sustainability in Slovenia, the members pointed out:**

Members 5 and 1 highlighted safety at work, because there is insufficient investment in this area, more training and more rights are needed, and this would certainly encourage more employment in tourism.

Member 4 believes that it is necessary to encourage the employment of migrants, thereby reducing the problem of staff shortages. At the national level, they are already considering new, shorter procedures for hiring foreigners in the labour market. All members agree that it is necessary to include all the listed socially vulnerable groups. Member 6 considers that »measures that facilitate the transition of workers from the informal to the formal economy« are also important.

The term Regenerative Tourism is known to half of the members, the other half was not yet familiar with the definition; we introduced them to it and got excellent views and opinions, which are given below.

Member 5 emphasized that the latest trends are already predicting higher acknowledgement of sustainability in tourism. They predict development in a regenerative way, i.e. regenerative tourism, which brings positive benefits for all stakeholders and the environment. The

minimization of negative impacts is planned to be upgraded through the regeneration of local communities, nature, the revival of degraded areas and the revival of heritage and, in general, to think more about the quality of resources (Zero to Landfill; from cradle to cradle). She pointed out: "I am looking forward to the professionalization of the term and its implementation in the activity". She pointed out the case when they organized an event with divers, the so-called "Aware" project, which initiated the sea clean-up campaign. International stakeholders also annually attend this event. It has been going on for 15 years, when it was organized for the first time, the participation was surprisingly large. She also highlighted a successful example of how tourists and visitors are encouraged to pick up waste in nature, by offering them a paper bag in which they store the rubbish found in nature along the way. They also started implementing the Australian pilot project, thus now they also measure consumption with installed sensors on radiators and weight the waste. All this data will be shared in a common national database. They are currently faced with a database where they can compare themselves to other destinations or accommodations and determine their own performance.

Member 4 states that it is important that all processes are well defined, and that it is thoughtfully considered which data and how will the data be provided, thus they can be used for later comparative analyses. At the international level, she highlighted the example of archaeological excavations in Bosnia, as an interesting way of preserving and learning about historical heritage. On the national level, she proposed examples like staging harvests in organic vineyards or olive groves, where participants can learn about the whole manual process. She points out an interesting circular economy tourism project implemented in Spain, where local growers, municipal authorities and hoteliers have joined forces. Whereby the hoteliers take local products from farmers and the leftovers produced are given by hoteliers to the utility services to be composted, thus the compost is given back to the farmers. At the same time, they organize workshops for guests and employees on what to do with food waste and how to avoid it, to raise awareness of the tourists, employees and the local population.

Member 1 strongly agreed with the proposal that it is necessary to find solutions for our waste so that it is no longer exported abroad. Brainstorm on how we could efficiently dispose of all the garbage on the lung run or process it into new products. The importance of buying local products has never been more important, as it is a way to take care of our environment. Slovenia is a small country, thus it allows us to deal with these issues more easily. It is important to raise this awareness among the local population, tourists, producers and distributors. On the other hand, we have corporations that want to earn more and do not support these trends, so it is primarily the individuals' jobs here to avoid mass tourism offers.

We further note that "regenerative tourism" is also used in higher educational programs, as pointed out by Members 5 and 3.

Member 3 said: *»Regenerative tourism has gained popularity in recent years due to the growing awareness of the negative impact of tourism on the environment and local communities. Many travellers are now looking for experiences that align with new values and contribute to sustainable development.*

*For regenerative tourism to be successful, a tourism destination must adopt a holistic approach that addresses the entire ecosystem of the area, including natural resources, social and cultural heritage, and the local economy. This requires working with local communities and stakeholders and implementing sustainable practices such as waste reduction, energy efficiency and conservation.*

*In addition to environmental and social benefits, regenerative tourism can also lead to economic growth by attracting responsible travellers who are willing to pay more for sustainable experiences. This allows us to create new employment opportunities and increase the income of residents while maintaining the unique character and authenticity of Slovenian destinations.*

*Overall, regenerative tourism is a promising trend that will become increasingly successful in the future as travellers become more aware of their impact on the environment and local communities. By using regenerative tourism practices, destinations can create a more sustainable and "just" tourism industry that benefits both visitors and residents«.*

Member 5 said: *"Yes, the concept of sustainable tourism has been taught in various formal school programs in Slovenia for some time. I finished my high school education in Maribor - the Tourist Technician program, and later I continued my university education at the University of Tourism in Primorska region - Turistica, where we also encountered sustainability. My Bachelor's degree was focused on Camping, which I found very interesting. But I had to seek literature in Scandinavian countries because European countries were not yet familiar with these ideas and practices. I was very happy when, a few years later, this wish became a reality, and on this occasion, I congratulated my interlocutor live. Mr [name] managed to establish an idea that no one in Europe has yet implemented«.*

Member 3 has no information on whether the term »Regenerative tourism« is already included in education systems but notes that the word is being used more and more often. She said: *»At UL EF, we include the term in educational programs that are now relevant for the tourism sector«.*

Member 1 observes that there are increasingly intensive initiatives on the part of the EU to make young people more familiar with and value sustainability and that the concept of regenerative tourism has been brought to life in practice.

All members agree that sustainable tourism training should include all three skills – flexible, creative-entrepreneurial and digital.

Member 4 believes that all three skills are important, especially the attitude to data: awareness of the importance of this data, why we need it, why it is open or not and how to handle it and structure it appropriately, how to connect it so that everything is in one place and up to date.



Such platform data management would mean easier decision-making on tourist flows and other challenges in tourism.

Member 3 thinks that creativity and entrepreneurial skills represent an important set of skills, which are key to the development of innovative and sustainable tourism products and services.

Member 1 states that tourism needs versatile people. He sees the biggest challenge in acquiring all the necessary skills. Especially family businesses and freelancers especially face such problems. Education alone cannot contribute to such personal progress. He sees the idea of an educational program that would be flexible in terms of time for the individual and would cover most of the skills and knowledge that tourism workers need. He believes that short and practical certified training would be of great value.

Member 6 considers: *»The training that our employees attend includes thematics such as –the design and implementation of projects focused on design thinking - e.g. the project logo, design of text related to European politics, etc. Employees at the Public Institution TKŠ Ormož have divided work tasks regarding the management of online systems (social media, websites, etc.). It is expected that they know how to use operating systems MS Office, Outlook, etc. If we are introducing a new operating system, employees receive training before using it. Flexible skills are part of an individual's personality.*

When asked whether such education and training programs benefit the country's tourism system, all members agreed. Concerning the local and regional areas, the members gave more specific opinions, which are highlighted below.

Member 2 believes that it is primarily necessary to establish tourism programs at universities and the possibility of retraining employees with inadequate education.

Member 6 believes that without training, it will be difficult for us to follow the direction of sustainability. With strategically oriented training, with the same goals, significantly better results could be achieved. Flexible skills training can mean new habits. However, he believes that the process needs to be continuously encouraged and upgraded.

In training projects, members mainly see the following benefits:

1. Benefit: Increasing integration and cooperation with all stakeholders in tourism.
2. Benefit: More ideas, innovations, better well-being at work, personal growth, etc.
3. Benefit: Increase in GDP.
4. Benefit: Increase in employment.
5. Benefit: Enables raising the quality of the local offer.
6. Benefit: It trains all stakeholders in tourism.

They agree that the current system still has room for improvement in the area of current training, which is listed below.



Member 6 highlighted the need for a greater emphasis on the awareness of all tourism stakeholders about the importance of integration and joint action. And also the need for training individuals in how to successfully draw funds for the tourism sector.

Member 5 highlights the formal education that she also completed at the University of Primorska, Faculty of Tourism Studies - Tourism (UP FTŠ Tourism). The study program has modern sustainable topics, e.g. digitization of business in tourism, smart destinations, and management of tourist destinations, but no practical experience. She points out that she continuously attends informal training in different areas that she needs in practice. Only that way can she successfully face today's tourism challenges and put what she has learned into practice. She pointed out that the universities she knows are already following new guidelines, e.g. circular economy in tourism, but it is still in its infancy. For example, The Faculty of Economics and Business of the University of Maribor (EPF) often includes economics in education and thus enables its students to learn theory in practice. She believes that subjects regarding methodology should not have so much weight in the first 3 years of university education, thus more attention should be given to practices.

Member 1 very well pointed out that current education needs to change already in primary schools. Because it is important that young individuals are introduced to values such as – respect for nature, the role of man in nature, the attitude towards the entire environment, why sustainability is important, recycling of waste...and then upgrading individuals with the needed knowledge in the field of tourism.

The members believe that the future will be conditioned by the following environmental issues:

- promotion of sustainable forms of transport (e.g. public transport),
- preservation of biodiversity,

Member 3 pointed out: *»Because human activities continue to encroach on natural habitats, there is a risk of extinction of many species of plants and animals. This loss of biodiversity can have cascading effects on ecosystems, including changes in pollination and other ecosystem services«.*

- 4 members identified "the ability to reduce consumption and maximize energy and water" as the dominant issue.

### **4.2.3 Profile of the Hybrid Project Management**

After conducting FG and discussions with all members, we have found that in the tourism sector, we do need a new profile of a "hybrid project manager", who with his knowledge, competencies and skills will be able to cope with the challenges of the tourism sector in Slovenia and other associated local, regional, national and global challenges.

Member 3 pointed out that: *»In the context of sustainable tourism, creativity includes the ability to think outside the box and come up with new ideas and approaches to tourism that reduce negative impacts on the environment and local communities. Entrepreneurial skills, on the other hand, include the ability to recognize opportunities in the tourism market and create sustainable business models that will take advantage of them«.* She also sees digital skills as an important area of training for sustainable tourism, which is increasingly important in all aspects of the tourism industry, from marketing and sales to customer service and operations. She believes that sustainable tourism professionals must be trained to use digital tools and platforms to effectively reach and engage with travellers, manage reservations and provide quality tourism experiences.

Member 3 sees adaptive skills as key to success in sustainable tourism. She lists the ability to adapt to changing market conditions, respond to unexpected challenges and collaborate with others to achieve common goals. Because sustainable tourism professionals must be able to navigate complex and dynamic environments to successfully achieve their goals. She believes that with these competencies, the industry can continue to grow and develop in a sustainable and responsible way.

As the most suitable techniques and methods of education, the members point out higher education programs, professional education and courses (additional specialized training and current information on global, European and Slovenian trends, certificates of acquired skills).

Members 1, 3, 4 and 5 think that tourism staff need a diverse set of skills to succeed in the industry such as communication, customer care, sales, marketing and management skills. Therefore, a comprehensive approach combining both theoretical knowledge and practical experience is essential.

To the greatest extent, the members think that in the future the most deficient personnel will be »direct services« for customers or »customer care«, followed by »digital/IT« staff, »data analysts« and »operators« in equal measure.

All members agree that emotional intelligence and human contact come first. Because tourists and every person first and foremost want personal contact and not contact with robots. Therefore, robotization is not what people in general want, but it is just a tool that the staff employed in the tourism sector can use to make their work a bit easier. Robotization is appropriate to the extent that it facilitates the work of a human, but not perform tasks that have personal contact with tourists or visitors.

We also asked which competencies the members found that their staff lacked.

Member 5 believes that the greater competitiveness of tourism systems would be influenced by marketing skills, with which we ensure a good sale of the service and information. Member 4 agrees with Member 5 and adds social media management skills, design fundamentals for design, online marketing and communication skills, and online safety as a foundation.

Member 1 agrees with Members 4 and 5 and adds that it is necessary to create such a profile that will be able to convey the wishes and needs of the tourist to the IT experts who are able to implement it. He indicates that there is an intermediate link that is missing, which is capable of communicating between the needs of tourists and the results that are needed. This skill is a new individual proposal that was not listed in the FG questionnaire.

**All members highlighted the skills:**

- "online marketing" and
- "data analytics, business intelligence and big data skills".

Member 1 added:

- the ability to find financial resources at the European and international levels,
- since a large part of tourism is linked to family offers, education must be short and flexible to the individual's schedule and financial capabilities.

All members agree that the profile of the hybrid project manager should primarily use the so-called »hybrid approach«. Two members also highlighted the so-called »agile« and »lean approach«.

Member 3 points out: *»The lean approach is a methodology that emphasizes efficiency and continuous improvement to increase value and customer satisfaction. At its core, the lean approach is focused on identifying and eliminating waste in all its forms, including excess inventory, overproduction, errors, and unnecessary process steps.*

*One of the key benefits of a lean approach is that it helps organizations focus on the needs of their customers. By eliminating waste and streamlining processes, organizations can better deliver services that meet or exceed customer expectations. This can lead to greater customer satisfaction, loyalty and ultimately profitability«.*

Member 2 highlights primarily: *»Flexible and innovative, able to quickly adapt to changes with versatile strategies and targeted interventions (»agile« approach)«.*

In the end, we introduced FG to the concept of »hybrid project manager« and only one member had already encountered the concept presented. While the rest of the members recognized the profile with the help of this round table.

Member 6, who has already encountered this term in some way, gave the following definition: *»Yes, it works comprehensively and includes all stakeholders in tourism«.* He also highlighted the company Forum Media d.o.o., which already conducts training in the direction of hybrid project managers.

Figure 15 shows which core skills, competencies and knowledge were highlighted by the members at the FG.





# Profile of the Hybrid Project Management



**Figure 15. Skills, Competences and Knowledge for the profile of the Hybrid Project Management from the focus group discussion (own work)**

**Table 3. Summary of the focus group research**

<p><b>About the value of sustainability in tourism</b></p>	<p>Growing demand for the sustainable offer from the side of tourists; need for knowledge and competencies on energy efficiency; implementation of the Green Scheme of Slovenian Tourism allowing to guide and evaluate destinations in terms of sustainability; shift to experiential travel and increased use of technology.</p>
<p><b>About the tourism labour market, skills and training in the tourism sector</b></p>	<p>Safety and security of jobs in tourism; simplification of entry to the labour market of migrants and vulnerable groups; measures that facilitate the transition of workers from the informal to the formal economy; being able to implement concepts of sustainability/regeneration in practice. More flexibility in educational programmes is needed to make them appealing to family businesses and freelancers.</p>

<p><b>About the Hybrid Project Management profile</b></p>	<p>Skills: Sense of organisation; social penetration and communication; ability to cooperate and work in a team; problem-solving skills; active listening; understanding the interlocutor; innovativeness; new ideas (traditional and new approaches); interpersonal skills; leadership skills; time management; critical thinking; emotional intelligence; creativity.</p> <p>Competences: Work in difficult conditions, fund acquisition, sustainable management with tourism stakeholders, digital competencies; hybridity, the integration of different knowledge, skills and transfer of these experiences to other stakeholders; awareness of the importance of open data; responsibility for the data processing and presentation of the results; ability to connect the national level with individual level, sustainable management with tourism stakeholders; constant monitoring and acquisition of formal and informal knowledge; specialisation in different areas of tourism according to target groups, management of sustainable and socially responsible projects; curiosity and desire for new knowledge and experiences; data analysis, use and understanding; use of digital tools; decision-making; foreign languages skills; basic digital skills for communication.</p>
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### 4.3 Primary (qualitative) research: The Desk Research

#### 4.3.1 Tourism labour market in Slovenia

Before the COVID-19 crisis, in 2019, tourism directly contributed 5,4% of GDP to the Slovenian economy (SURS 2023). Most jobs are generated in the food and beverage (around 40% of employed in 2020), followed by accommodation (20%) services (SURS 2023).

The pandemic has had a severe impact on the tourism industry globally, reducing tourism activity by approximately 70% (UNWTO; 2020). Yet tourism fastly recovered and numbers of tourists and overnights in 2022 were reaching the pre-pandemic numbers in Europe (UNWTO; 2023). Travel exports in 2022 were 74% higher than in 2021 and 2% higher than the pre-crisis level in 2019.

The situation in Slovenia is similar to the global tourism outlook. Yet, Slovenian Tourism Organization, lately warns about the upcoming challenges related to the economic crisis with an increase in inflation and interest rates, oil and food prices, political instability, war, and workforce shortage (Slovenian Tourist Board, 2023). The salary in the industry is on average



36% below the average in the country, but the demand for tourism professions is growing (MGRT, 2022).

Also, the crisis highlighted the need for further digital and sustainable transformation of the industry (European Commission, 2023). The Strategy of Slovenian Tourism for 2022-2028 points out that the success of the industry will depend on how well it will adopt digital and sustainable solutions. Digitalization and sustainable transition are seen as key to the creation of more added value for all tourism stakeholders.

Slovenian government was very supportive of the tourism industry during the pandemic, enabling the sector to keep the competitive advantages in the years to come. The government offered support to the companies to keep the workers. The demand for domestic tourism has been stimulated with the tourism vouchers issued for the Slovenian residents, which could have been used for a wide range of tourism and hospitality services in Slovenia. Tourism voucher scheme dedicated approximately 350 million EUR, or 0.72% of Slovenia's GDP in 2019 to Slovenian residents to spend holidays at home (Cvelbar et al., 2021).

#### **4.3.2 Existing qualifications for tourism professionals in Slovenia**

The Slovenian Qualifications Framework is a unified qualification system for classifying qualifications according to learning outcomes. It is based on the Law on the Slovenian Qualifications Framework from 2016 and aims to ensure transparency and recognition of qualifications in Slovenia and the EU (Center Republike Slovenije za poklicno izobraževanje, 2020). The framework distinguishes between *educational* (evidenced by the document about completion of the education), *vocational* (evidenced by the certificate of acquired national vocational qualification or completed training), and *additional qualifications* (evidenced by a certificate, supplementing the individual's competence at the achieved level and in a specific professional field and issued under the Law on Slovenian Qualifications Framework).

In Slovenia, tourism and hospitality education is provided by 42 institutions of professional and secondary education, 14 of higher education, 9 faculties of 3 universities and 4 independent faculties and colleges (MGRT, 2022).

There are 54 qualifications in the area of tourism and hospitality placed between the 3rd and 10th levels of the national qualification framework. We reviewed these qualifications for mentioning the sustainability, project management and digital skills in the learning outcomes (Table 4).

*Sustainability skills.* From the 3rd level, most of the qualifications include taking care of the environment, and responsible and rational use of the energy and materials. Beyond that, some qualifications include awareness and preservation of the cultural heritage, use of the local food, respect of the local traditions and cultural diversity. Sustainability is directly mentioned in 10



out of 49 reviewed qualifications, and in 27 qualifications some aspects related to sustainability have been mentioned.

*Project management skills* are mentioned directly in five qualifications, however, learning outcomes that include planning, organisation, leading and promoting of the activities, and teams, ensuring and controlling work quality, supervision of the work and similar aspects which might be related to the project management are mentioned in 41 tourism and hospitality qualifications.

*Digital skills* are mentioned in 29 out of 49 reviewed qualifications, mostly in the form of »use of the modern information-communicational technology«, without specific details for any of the qualifications.

**Table 4. Overview of the inclusion of sustainability, digital, and project management skills in the descriptions of the learning outcomes for the qualifications in tourism and hospitality in Slovenia.**

Qualification in tourism and hospitality	Level	Sustainability	Project management	Digital skills
<b>3rd level</b>				
<b>Chef's assistant</b>	vocational	□	□	
<b>Housekeeper's assistant</b>	vocational	□	□	
<b>Waiter's assistant</b>	vocational	□	□	
<b>Room attendant</b>	vocational	□	□	
<b>4th level</b>				
<b>Gastronomist hotelier</b>	educational	●		
<b>Gastronomist hotelier SI</b>	educational	●		
<b>Room supervisor</b>	vocational			□
<b>Pizza maker</b>	vocational	□	□	
<b>Housekeeper</b>	vocational	□	□	□
<b>5th level</b>				
<b>Gastronomy and tourism technician</b>	educational	□	□	□
<b>Gastronomy and tourism technician SI</b>	educational	□	□	□
<b>Bartender</b>	vocational		□	
<b>Diet cook</b>	vocational		□	



Qualification in tourism and hospitality	Level	Sustainability	Project management	Digital skills
Cheese consultant/cheese sommelier	vocational		<input type="checkbox"/>	
Gastronomy technician	educational	<input type="checkbox"/>	<input type="checkbox"/>	
Wine consultant sommelier	vocational		<input type="checkbox"/>	
Master Chef	educational	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Catering manager	vocational		<input type="checkbox"/>	
Catering master	educational		<input type="checkbox"/>	<input type="checkbox"/>
Chef, front cooking	vocational	<input type="checkbox"/>	<input type="checkbox"/>	
Food Preparer, front cooking	vocational		<input type="checkbox"/>	<input type="checkbox"/>
Restaurant Dessert Preparer	vocational		<input type="checkbox"/>	<input type="checkbox"/>
Slot machine operator	vocational		<input type="checkbox"/>	
Croupier	vocational		<input type="checkbox"/>	
Casino cashier	vocational		<input type="checkbox"/>	
Sauna operator	vocational	<input type="checkbox"/>	<input type="checkbox"/>	
<b>6th level</b>				
The business organiser in the hospitality and tourism industry	educational	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hotel reception manager	vocational	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Business organiser in the wellness industry	educational	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hotel operations manager	vocational	<input type="checkbox"/>	<input type="checkbox"/>	
Food and beverage manager	vocational	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Business meeting and events organiser	vocational	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Destination management consultant	vocational	●	<input type="checkbox"/>	<input type="checkbox"/>
Tourism animator	vocational	<input type="checkbox"/>	<input type="checkbox"/>	
Tourist information provider	vocational	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Travel agency manager	vocational	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



Qualification in tourism and hospitality	Level	Sustainability	Project management	Digital skills
Hotel housekeeper	vocational	□	□	□
<b>7th level</b>				
Bachelor sustainable tourism organiser (vs)	educational	●	●	□
Bachelor tourism organiser (un)	educational	□	●	□
Bachelor mediator in tourism (vs)	educational	□	□	□
Bachelor in tourism (vs)	educational	□	□	□
Bachelor in tourism (un)	educational	□	□	□
Bachelor hotel and tourism business organiser (vs)	educational	●	●	□
Bachelor tourism organiser (vs)	educational	●	●	□
Bachelor hotel and tourism organiser (vs)	educational	●	●	□
Bachelor in health tourism business (vs)	educational	●	□	□
<b>8th level</b>				
Master in heritage tourism	educational	●	□	□
Master in Tourism	educational	●	□	□
<b>10th level</b>				
Doctor of Science in Travel, Tourism, and Leisure	educational	□	□	□

Notes: vs - higher education, un – university; ● – directly mentioned; □ – some of the related aspects are mentioned. Source: own work based on the Slovenian Qualifications Framework (2023).

### 4.3.3 Synthesis of the key documents

In this section, we present the results of the review of the key documents and strategies in Slovenia, which are relevant to the changing needs of skills in the tourism workplace market. We identified ten key documents from the areas of tourism, employment, and professional and vocational education. The details can be found in Appendix 3. Table 5 offers a summary of the findings.



**Table 5. Summary of the desktop research**

	Key trends	Actions to take	Emerging themes	Final considerations
<b>About the value of sustainability in tourism</b>	<p>The focus areas are:</p> <ul style="list-style-type: none"> <li>- single-use plastics and food waste;</li> <li>- local supply and short supply chains;</li> <li>- cooperation with local communities.</li> <li>- tourism product development: a need to diversify Slovenia's tourism offerings beyond its natural and cultural attractions, and to develop new tourism products that cater to specific market segments; promote niche tourism products, such as wellness, gastronomy, and adventure tourism, that can help to attract higher-spending visitors</li> </ul>	<ul style="list-style-type: none"> <li>- Put sustainability principles at the core of the product development</li> <li>- Systematise and finance the Green Coordinators positions in organisations and destinations</li> <li>- improve the competencies of destination organizations and individual stakeholders</li> <li>- implement environmental, social, and corporate governance (ESG ) reporting among tourism operators</li> <li>- digitalise the Green Scheme of Slovenian tourism and use real data on energy, water and waste consumption (reduce self-reporting data sources)</li> </ul>	<ul style="list-style-type: none"> <li>- regenerative development</li> <li>- circular economy</li> <li>- carbon neutrality</li> <li>- tourism ecosystem</li> <li>- niche tourism products.</li> </ul>	<p>The growing need for a sustainable, and even regenerative development transition requires significant training in the green skills and competencies of the employees on all levels. Even though sustainability-related topics are covered in curriculums on different levels, there is a lack of understanding, of how sustainable practices can be implemented specifically among tourism operators (tourism industry).</p>

	Key trends	Actions to take	Emerging themes	Final considerations
<p><b>About the tourism labour market, digital skills and training in the tourism sector</b></p>	<p>The growing need for the following competencies:</p> <ul style="list-style-type: none"> <li>• ESG reporting knowledge;</li> <li>• Circular economy and transition to carbon-neutral and carbon-zero operation;</li> <li>• Service quality and service excellence;</li> <li>• Digital marketing and promotion;</li> <li>• Sustainable/circular/regenerative tourism supply development;</li> </ul> <p>Numerous digital competences</p> <ul style="list-style-type: none"> <li>• General ICT user knowledge, information and data literacy such as searching and filtering, assessment, and management of data, information and digital content.</li> <li>• Online communication, the use of Internet and intranet communication systems, electronic correspondence and online communication, including online meetings.</li> </ul>	<ul style="list-style-type: none"> <li>• Implementing apprenticeship programs.</li> <li>• Strengthening cooperation between the education system and the labour market could help ensure that the skills taught in educational programs are aligned with the needs of employers.</li> <li>• Developing an efficient training system in companies to improve the quality of vocational education.</li> <li>• Implement on-the-job training in tourism.</li> <li>• Introducing digital competencies into formal education programs.</li> </ul>	<ul style="list-style-type: none"> <li>• Shortage of qualified workforce in tourism companies and the issue is expected to increase in the future</li> <li>• Youth are more interested in higher education than vocational education, which does not reflect the market needs.</li> <li>• Lack of investment in the training of employees in the tourism sector by companies.</li> <li>• Rewards, promotions, and other incentives for staff in the hospitality and tourism sector are insufficient.</li> <li>• Lack of specific vocational standards that reflect the needs of the economy.</li> <li>• Lack and further decrease of the number of vocational educators in the area of tourism</li> </ul>	<p>Slovenia aims to become a leader in smart and sustainable tourism. A big stress is made on digital and sustainable transformation.</p>



	Key trends	Actions to take	Emerging themes	Final considerations
	<ul style="list-style-type: none"> <li>• Processing and management of electronic sales points and other digital purchasing systems.</li> <li>• Data entry, search, basic analysis, routine reporting and presentations using server or cloud database, including CRM.</li> <li>• "Big data" and analytics, creating, recording and making sense of data obtained from platforms.</li> <li>• Content creation, development, integration and processing of content for digital systems and users and management of copyrights and licenses associated with this content.</li> <li>• Data and system security</li> <li>• Travel and reservation management software</li> </ul>		<ul style="list-style-type: none"> <li>• Introducing strategic research and innovation partnerships (SRIPs) and improving value chains to increase innovativeness in the tourism sector.</li> <li>• The importance of addressing obstacles faced by youth workers</li> </ul>	

	Key trends	Actions to take	Emerging themes	Final considerations
<b>About the Hybrid Project Management profile</b>	<p>The majority of the existing qualifications in tourism do not cover project management skills. However, existing qualifications include planning, organisation, leading and promoting the activities, teams, ensuring and controlling work quality, and supervision of the work which can be upgraded with the PM skills. At the same time, some of the programmes at the universities and training organized for the tourism stakeholders are more flexible and aim to provide skills demanded by the market.</p>	<ul style="list-style-type: none"> <li>• Increase the digital competitiveness of the companies</li> <li>• Deliver the value of the green transition to stakeholders on different levels, provide them with tools to implement green strategies in practice, evaluate and monitor their performance</li> <li>• Enable employees to organize, market and implement innovative tourism products</li> <li>• Encourage entrepreneurship</li> <li>• Enable businesses to use collected data for decision-making, designing and marketing of the product.</li> </ul>	<ul style="list-style-type: none"> <li>• Flexibility</li> <li>• Sustainable green innovations</li> <li>• Informed decision making</li> <li>• Sustainable business models</li> <li>• Resilience and crisis management, ability to react quickly to changing market conditions</li> <li>• Managing the Green Destination process</li> <li>• Develop your action plan in line with the Green Destination indicators, and communicate with other stakeholders at the destination and with the operator.</li> <li>• Account for trends when designing the product</li> <li>• Use of artificial intelligence in marketing and online sales</li> </ul>	<p>The tourism industry is represented mostly by small and medium enterprises, where one person performs multiple roles. Project management skills are crucial for the operations of the tourism business. Establishing tourism ecosystems and increasing the role of data sharing requires even advanced skills in coordination, communication, and data-supported decision-making.</p>

## 4.4 Good Practices

### 4.4.1 Green Coordinators and management of the Green Scheme of Slovenian Tourism

Active cooperation among destinations, tourism service providers and other stakeholders is vital for targeted cooperation in the development of sustainable tourism. Therefore, the Green Scheme of Slovenian Tourism (GSST) was developed. It is a national certification programme bringing together all sustainable tourism efforts in the country under the brand SLOVENIA GREEN (Slovenia-green, n.d.).

The GSST aims to combine all efforts directed towards the sustainable development of tourism in Slovenia. The key strategic objective of the scheme is to introduce sustainable models to Slovenian tourism, tourism service providers and destinations. Specifically, it focuses on:

- offering tools to destinations and service providers that enable them to evaluate and improve their sustainability endeavours,
- promoting these green endeavours through the SLOVENIA GREEN brand.

Slovenian Tourist Board manages and develops the scheme, and offers education, and international promotion for Slovenia Green (SG) destinations and service providers. Association for Sustainable Tourism GoodPlace has a license to make assessments using the Green Destinations Standard and is a Green Destinations partner. The GSST is based on international sustainability criteria. To obtain the Slovenia Green Destination label (bronze/silver/gold/platinum), the destinations must meet the Green Destinations Standard criteria.

Even though the GSST is about a broader, sustainable approach, almost half of the indicators are (in)directly connected to the circular economy. Based on those indicators, destinations develop action plans with measures for improving the energy efficiency of buildings, waste management practices and efficiency of water use, using green energy sources and setting strict targets for waste disposal and recycling. In addition, GSST enables destinations to compare themselves with other destinations from the EU and beyond and based on that identify opportunities for further improvement and future actions (Interreg-Europe, 2023).

Currently, in Slovenia, there are 62 destinations, 138 accommodations, 4 natural parks, 7 agencies, 11 tourist attractions, 59 restaurants and 2 beaches which comply with the green strategy and obtained the Slovenia Green label.

GSST is an inspiring example of how to encourage destinations and tourism service providers to adopt standards of sustainability and stimulate innovation in the tourism sector. The scheme is a practical and effective tool for promoting the introduction of sustainable business models in Slovenian tourism and at the same time a basis for the marketing of green offers. Its objective is to accelerate the introduction of sustainable models in Slovenian tourism, both at the level



of tourism providers and destinations. Also, it is a tool for assessing and improving the sustainability performance of destinations and providers.

Scheme's objectives are also to introduce sustainable business models at the level of individual smallest units (municipalities), in accordance with the sustainability assessment method; sustainability assessment of integrated, geographically meaningfully rounded and developmentally coherent tourist destinations (to achieve relevant results); regular implementation of measures to improve sustainability by existing functioning and functional organizational structures; marketing of the green offer of Slovenian tourism based on identified sustainable products of individual tourist destinations; and encouraging tourist destinations to introduce sustainable business models at destination level to the point where Slovenia is 100% green (Slovenian Tourist Organization, 2023).

What is interesting and worth learning from for the HyPro4ST project is the management of the Green Scheme at the micro-level (in municipalities) where the green coordinator and green team play an important role.

#### *Management of the Green Scheme at the micro-level (in municipalities)*

For the acquisition, maintenance and renewal of the Slovenia Green Destination Label destinations have to follow 11 steps (Slovenia-info, 2023). And these 11 steps are coordinated, supervised and monitored by the Green Coordinator and Green Team.

#### *Destination Green Coordinator*

The Destination Green Coordinator is in charge of the overall project. The Green Coordinator is an employee of the applicant organization in the field of (sustainable) tourism. Green Coordinators who are not directly responsible for the development of tourism in the destination do not have sufficient competencies and are not able to carry out their tasks adequately and responsibly.

The first task of the Green Coordinator is to attend an introductory support workshop to get more detailed guidance and clarification. The Green Coordinator should attend the support workshops regularly to ensure a smooth and quality working process and to acquire the necessary knowledge in the field of sustainable tourism. Since 2022 Green Coordinator also has to pass a knowledge test on the GSST, which is available on the Slovenia Green platform, when starting the job. Successful completion of the test for Green Coordinators is mandatory at least every three years at the time of reassessment or when changing the person in the post.

The tasks of the Green Coordinator also include:

- Managing all steps (becoming and obtaining the status of Green Destination).
- Mandatory attendance at support workshops.
- Planning data collection.
- Entering data on the online platform.

- Informing stakeholders about the destination.
- Managing the whole process and further improvements.
- Reporting.
- Communication with the operator (Slovenian Tourist Board) and the accredited partner (Good Place Institute) (Slovenian Tourist Organization, 2023).

### *Green Team*

The Green Team involves key stakeholders who work together to gather data and design and implement development actions and targets. The team includes representatives of organizations, businesses and individuals from the destination who are involved in and have an interest in the tourism industry. In addition to representatives from the private sector and the destination management organization in the group, public service providers and local authority departments responsible for employment, economic growth, planning, protected areas and the environment are also part of the green team.

Regular meetings of the Green Team are essential. The most effective way to involve all relevant stakeholders is to organize a joint meeting or workshop where the Green Coordinator presents the GSST, the reasons for inclusion with expected results, the criteria, and indicators and how data will be collected and evaluated, the roles of each stakeholder and the system for setting targets and actions.

The meeting should clearly define the roles and responsibilities of the Green Team members and the timing of the data collection. The responsibilities of the Green Team members are linked to their respective competencies. For example, a representative of a municipal waste disposal team should be able to report recycling rates, and a representative of a local electricity provider should be able to report energy consumption data. As the activities of the green team move from initial data collection to analysis of findings and prioritization of actions, the green coordinator should guide stakeholders to agree on responsibilities for defining targets, planning actions to achieve the targets and implementing the agreed actions (Slovenian Tourist Organization, 2023).

**Conclusion.** Green coordinator and its green team are offered numerous educational workshops on sustainability, green development, tourism, marketing and promotion. But it is important to emphasize that the green coordinator is not offered knowledge on management, communication skills and administration of GSST. Green coordinators have all the possibilities to become experts on the topic of sustainability, but way fewer opportunities to become proper managers of sustainable development on micro destinations (municipalities).

#### ***4.4.2 Higher education programme 'Contemporary Tourist Practices' at the Faculty of Tourism, University of Maribor, Slovenia***



After an analysis of higher education and university programs, we found that in the Republic of Slovenia (hereafter RS) we implement programs that support the goals of the HyPro4ST project. An example of such good practice is the Faculty of Tourism (hereafter FT), which belongs to the University of Maribor.

For the purpose of describing good practice, we decided to conduct not only research on written sources but also conduct the interview. We have addressed a few short questions to the Head of the Study programme in the form of an oral interview. The interview is also attached at the end of this document. By conducting the interview, we got a precise and in-depth insight into the educational program and thereby ensured its relevance.

The Faculty of Tourism University of Maribor decided on October 1, 2020, to change the Education program for Tourism Studies. They have decided to firstly open two different levels of the program, thus the Higher education level and University level were opened for students to choose. Two new programs emerged: a higher education program called "Contemporary Tourist Practices« (furthermore CTP) and a university program called "Cooperation and Development« (Appendix 2).

Further, we will present the »CTP« that we recognized as a good practice already in the stage of performance.

*»The basic goal of the 1st-level professional study program Contemporary tourism practice is to educate graduates who will be able to organize, market and implement tourism activities. Their activities will be primarily aimed at solving the problems of the design and realization of tourism offers in organizations where they will be employed or self-employed, which means that the graduates will be able to work as competent professionals in companies that perform any tourism activity and also in all other companies that appear as cooperators or complementors in the formation of the tourist offer« (Faculty of Tourism, 2023).*

In each year, we can find types of subjects that support the skills, competencies, and knowledge necessary for the successful management and management of the tourism sector.

In the first year of the educational program, we find subjects:

- *Entrepreneurship in tourism.*
- *Intercultural communication and ethics in tourism.*
- *Digital communication in tourism.*
- *Rhetoric for tourism workers.*

In the second year of the educational program, we find subjects:

- *Data analysis in tourism.*
- *Dealing with people at work.*
- *Sports tourism.*

- *Marketing and research of tourist markets.*
- *Introduction to destination management.*

In the third year of the educational program, we find subjects:

- *Creativity in tourism promotion.*
- *Management of food establishments.*
- *Quality in tourism.*
- *Designing experiences.*
- *Contemporary trends in tourism* (Faculty of Tourism, University of Maribor, 2023).

We noted that all the above-mentioned courses support the development of new key competences already among young people. This is an example of good practice because when young people enter the labour market, they will be well-versed theoretically and academically, so their performance in practice at the workplace will be higher than it was in the past.

The course of study called »CTP« will be fully implemented in the 2022/2023 school year. But it was already developed and used in some lectures from the year 2020 onwards (Appendix 2).

The first evaluation of the program will be made after 3 years of running the program »CTP«, when the first generation of students will graduate. So, the evaluation of the performance for this program can't be made yet (Appendix 2).

The reason for changing the program to its foundations is the changing conditions in the tourism industry that allow the need for new knowledge, skills and competencies. The Faculty of Tourism is aware of the importance of eliminating the gaps between education and practice, thus they must also adapt to this type of situation in the tourist market. That is why the partnership and cooperation of the educational sphere with employers, decision-makers and tourism planners was crucial for them. They did this as soon as they recognized the need. Their main aim is to really offer quality education and prepare youth for the contemporary tourism sector challenges (Appendix 2).

They are aware that programs need to be renewed constantly, and currently, they already are preparing a renewal for the existing program. There is a constant process of adapting to the current world situation. The Covid-19 crisis was also one of the reasons they needed a renewed program (Appendix 2).

Research and the views of prominent representative international institutions show that the answer to today's challenges will come from learning and research, data management and the sustainable development of tourism.

In any case, this is about the connection of necessary competencies with current tourism trends.

Young people will be equipped with the following skills, competencies and knowledge:

Graduates of the 1st-level professional study program »CTP« will acquire the following subject-specific competencies, skills and knowledge within the study program:

- general knowledge of tourism as a special service activity at the national and international level,
- knowledge of Slovenia as a tourist destination and the most important tourist region in the world,
- understanding of the basic categories of management and the economy of the company,
- understanding of the basic principles of planning, management and management of tourist destinations and tourist structures,
- the basics of dealing with people at work,
- mastering the basic rules and skills of intercultural and digital communication in tourism,
- communicative competence in three foreign languages, in-depth linguistic knowledge and terminology in the field of tourism,
- the use of the basis of information technologies and the specifics of information solutions in tourism,
- practical knowledge of various forms of tourist products, separating their mission and purpose,
- the ability to design creative tourism products in various fields,
- knowledge of trends in tourism,
- understanding the importance of safety in the contemporary tourist environment,
- practical knowledge of the operations of hotels, tourist establishments, food establishments and destination organizations,
- knowledge of the fundamental organizational and legal characteristics of Slovenian and international tourism,
- knowledge of the concept, process and content of marketing in a tourist organization,
- demonstrating values following the principles of sustainable tourism and ethical standards,
- evaluation of the quality of services and experiences in tourism (Appendix 2).

#### **4.4.3 Grow Slovenia with Google**

Grow with Google Slovenia (Google, 2023) is a programme offering free education for anyone interested to improve their skills in digital marketing and use of the Google tools. It took place in the years 2021-2022 as a response to the growing need for the digital transition, highlighted by the Covid-19 crisis. Over these 2 years, over 100 online training sessions took place in Slovenia (SPIRIT Slovenia, n.d.).



Google partnered with local organisations, in particular, the Centre of the Business Excellence (CBE) of the School of Economics and Business, the University of Ljubljana. The CBE is also a leading partner of Strategic Partnership in Research and Innovation in Tourism. This made it possible to involve the best local experts in online marketing, AI, and digital technologies in providing online training and one-to-one consultations to anyone interested in upscaling their digital knowledge and competencies. The local experts involved as trainers also share their own experiences and local best practices with participants, making the content more relevant to the local market. The training is provided in Slovenian, making them accessible to the wide public. The training's target group were:

- Small or medium-sized business owners who want to achieve more business efficiency, competitive advantage and growth through digital transformation.
- Employees who want to get acquainted with the basics of digital marketing and digital tools.
- Everyone who wants to advance or change jobs needs digital skills.
- Students who want to acquire practical marketing skills and get to know digital tools during their studies.
- Those planning to set up a new website in their company and want to start advertising on Google, Facebook or Instagram platforms.
- All who work in tourism and the online presence of their company depends solely on them.

Grow with Google training focuses on three areas:

- Basics of digital marketing and digital skills
- Basics of digital marketing and digital skills in tourism
- Basics of artificial intelligence in marketing and online sales

The topics covered the introduction and follow-up sessions on:

- Digital marketing
- Webpage optimisation
- Online advertising
- Online sales and expansion abroad
- Use of artificial intelligence in marketing
- Machine learning, artificial intelligence and predictive analytics in online shopping
- Advertising on social networks
- Google advertising
- On-site and off-site optimization of websites

In addition to free training which were done in real-time online interactive sessions, the participants have access to the rich training base by Google, allowing them to get a certificate upon the successful completion of the course.

Google offered entry-level, however, very practical training on how to use their digital tools, aiming primarily at SME business owners and managers. Illustrated by the local examples, these were high-quality training available for anyone willing to upgrade their digital marketing skills, supported by Google's numerous tools and market leader reputation. In the period from 2020 to 2022, more than 1600 participants concluded workshops to improve digital competencies in the tourism industry within the Google initiative – Grow Slovenia with Google.

#### ***4.4.4 Strategic Partnership for Research and Development in Tourism (SRIPT)***

Another example of good practice is Strategic Partnership for Research and Innovation in Tourism - SRIPT. In Slovenia, tourism is part of S5 (smart, sustainable, specialisation strategy), which is quite unusual since tourism is not seen as an innovative and research and design-based industry. The SRIPT is a network of 76 members - 53 companies and 23 public or non-profit institutions and organisations. The main goal for SRIPT is to 1) build knowledge and competence of middle and top management in tourism and 2) help members in the development of innovative tourism products.

In the period 2020-2022, more than 400 middle- and top managers from tourism participated in the educational programs for executives tackling topics of sustainable development, digital transformation, leadership, strategic management and service quality and excellence. This is an excellent result and number, considering the size of the tourism market in Slovenia.

The Partnership also developed several pilot projects such as:

- 1) pilot for digital reception;
- 2) optimisation of capacities for hotels;
- 3) climate resort certification scheme;
- 4) the tourism potential of underground architectural heritage sites.

Those projects connect several SRIPT members with a common interest in the specific topic to foster innovation in the industry.

## **5. Conclusions and Recommendations**

With multiple qualitative and quantitative methods, we explored the current state and needs of the tourism labour market in Slovenia. In light of the ongoing post-Covid recovery and employee crisis, there is an urgent need to harmonize the training of tourism professionals with the needs of the market. While there are many good examples of tourism curriculums, formal and informal training for the industry, however, none of the qualifications covers all the



dimensions of HyPro4ST, with a focus on sustainable, digital and project management skills combined.

Slovenia is a recognized world leader in the green transition, Slovenian tourism industry can be used as a benchmark for the implementation of green and sustainable practices, such as the mentioned Green Scheme of Slovenian Tourism. On a strategic level, there is a clear vision of the green and digital transition of the tourism industry, supported by an excellently elaborated Strategy for the Digital Transformation of Slovenian Tourism 2022-2026, Strategy of Slovenian Tourism 2022 – 2028, Strategy of the Sustainable Growth of Slovenian Tourism, among the others. All these documents, however, highlight the importance of upskilling tourism professionals as one of the keys to sustainable transition and competitiveness of the industry as well as bring to attention the lack of workers, modern curriculums and efficient in-company training.

Interviews with experts helped to map the skills, which are crucial for the HyPro4ST profile. These are a sense of organisation, social penetration and communication, ability to cooperate and work in a team, problem-solving skills, active listening, understanding the interlocutor, innovativeness, new ideas (traditional and new approaches), interpersonal skills, leadership skills, time management, critical thinking, emotional intelligence, creativity. Among the key skills recognized both in interviews and the survey is adaptability, flexibility and innovativeness, all became even more desired as a result of the Covid-19 crisis. The survey results show more of the employee's/future employees' perspective and suggest that there is a need for more staff training in the area of project management, as well as understanding how sustainability, digital and project management skills can contribute to tourism company competitiveness.

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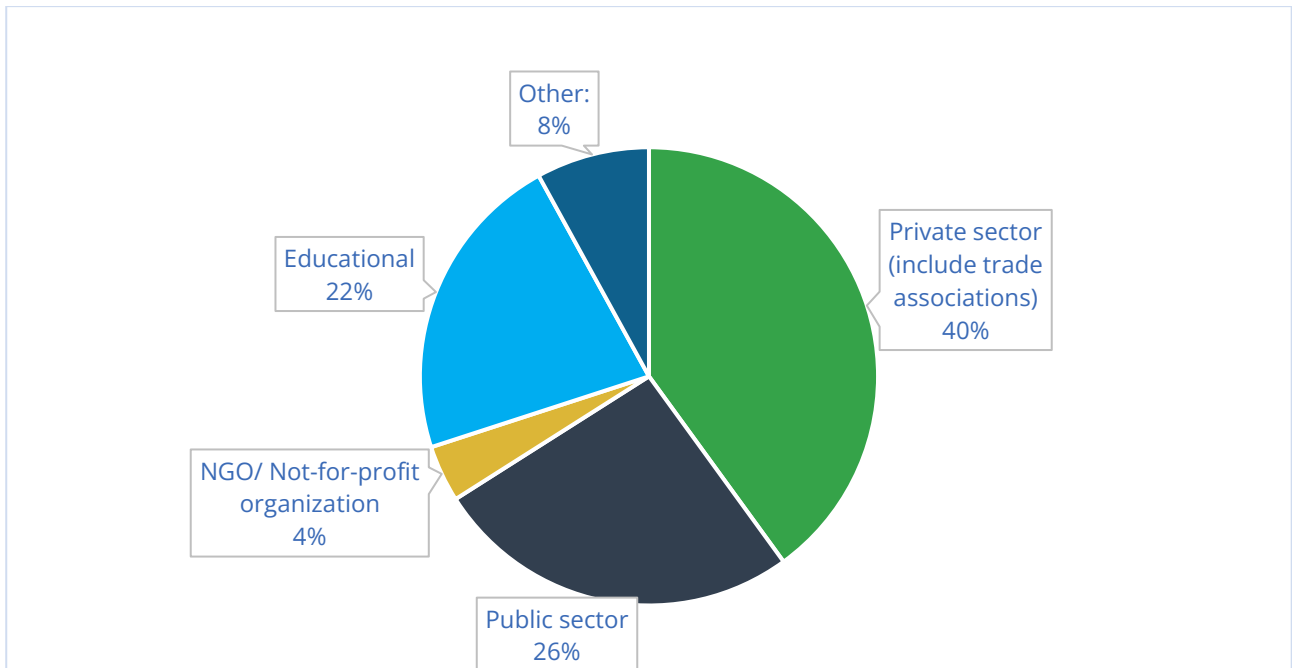
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20. Slovenian Tourist Organization. (January 2023). *Slovenska turistična organizacija*. Pridobljeno 23. march 2023 iz Priročnik za pridobitev, vzdrževanje in obnovo znaka Slovenia Green: [https://www.slovenia.info/uploads/zelena\\_shema/2022/Pozivi%20ZSST%202023/2023/Prirocnik.pdf](https://www.slovenia.info/uploads/zelena_shema/2022/Pozivi%20ZSST%202023/2023/Prirocnik.pdf)
21. Služba Vlade Republike Slovenije za razvoj in evropsko kohezijsko politiko. (2022). Slovenska strategija trajnostne pametne specializacije S5 (osnutek).
22. SPIRIT Slovenia. (n.d.). Pretekli dogodki | Izvozno okno. 2023. Retrieved April 18, 2023, from <https://www.izvoznookno.si/pomoc-izvoznikom/izobrazevanje/pretekli-dogodki#gwg>
23. STO. (2022). Nacionalna turistična kampanja za dvig ugleda poklicem v gostinstvu in turizmu | I feel Slovenia. <https://www.slovenia.info/sl/novinarsko-sredisce/sporocila-za-javnost/19969-nacionalna-turisticna-kampanja-za-dvig-ugleda-poklicem-v-gostinstvu-in-turizmu>
24. UNWTO. (2023). 145 key tourism statistics. <https://www.unwto.org/tourism-statistics/key-tourism-statistics>
25. Zavod Republike Slovenije za zaposlovanje. (2021). Mladi in trg dela. <http://www.ess.gov.si/>

## 7. Appendix 1: Survey Results

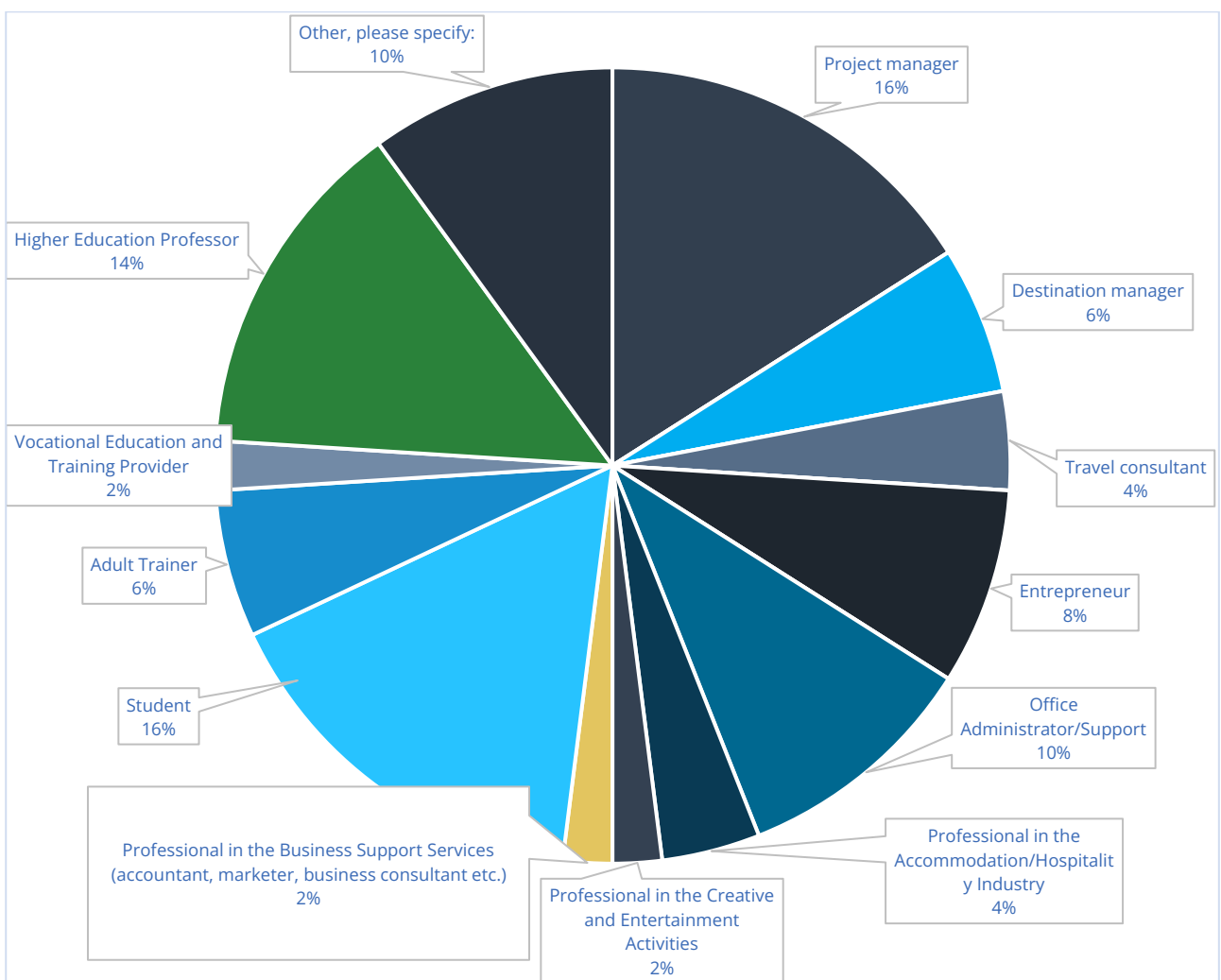
This appendix includes graphs which were not included in the results section.

### Respondent's profile

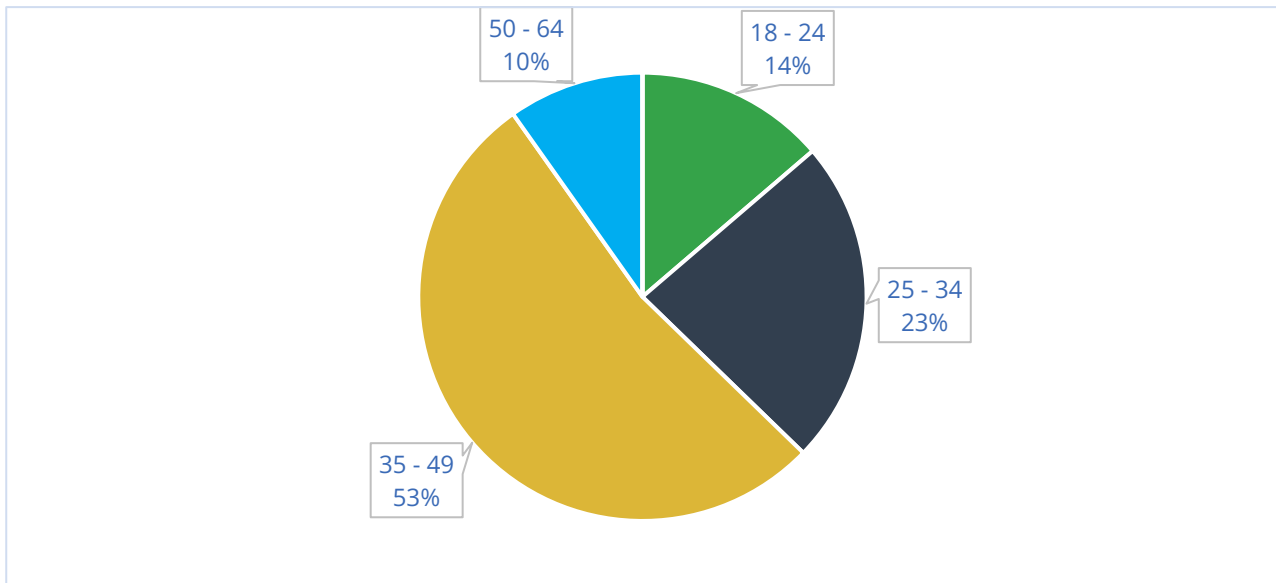
Please indicate the sector in which you work



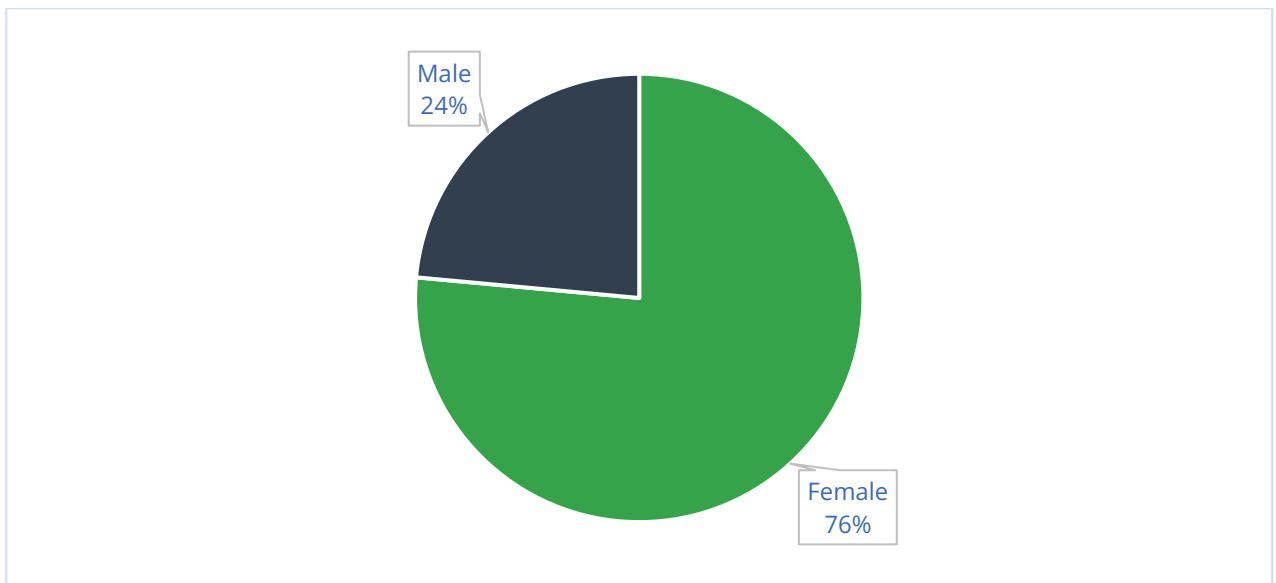
Which of the following describes best your current job/role?



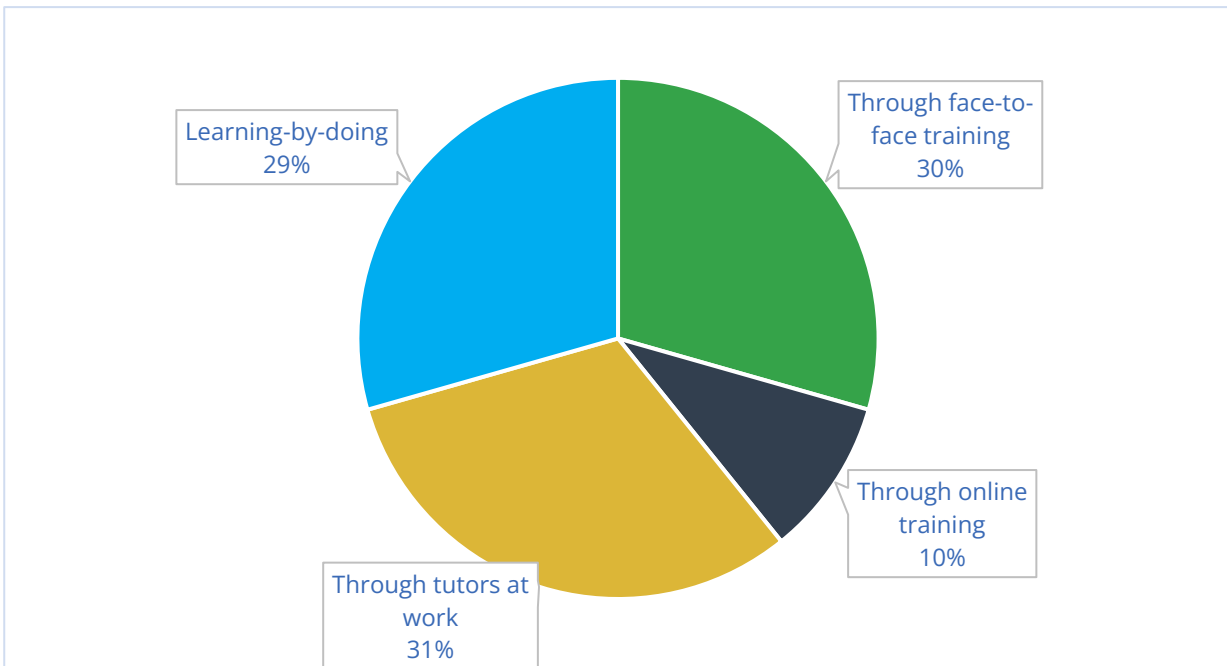
Age group



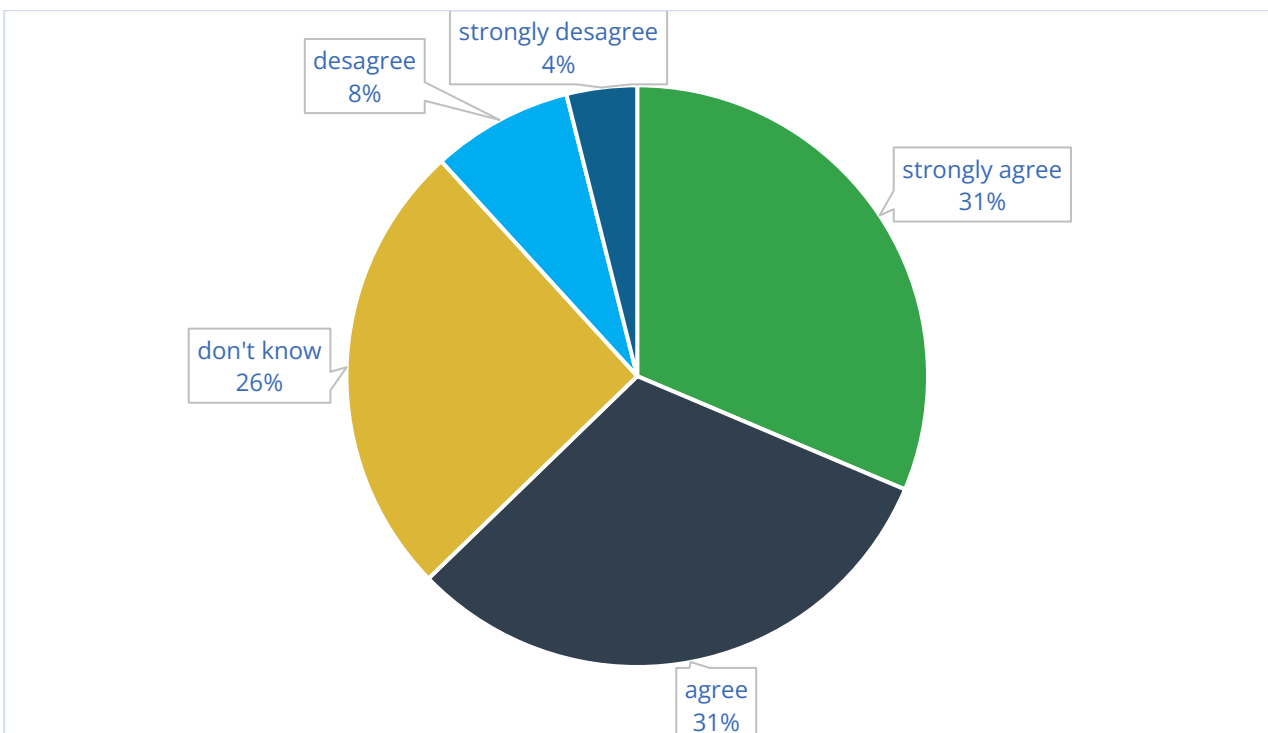
Gender



What is the most effective form for training a tourism professional?

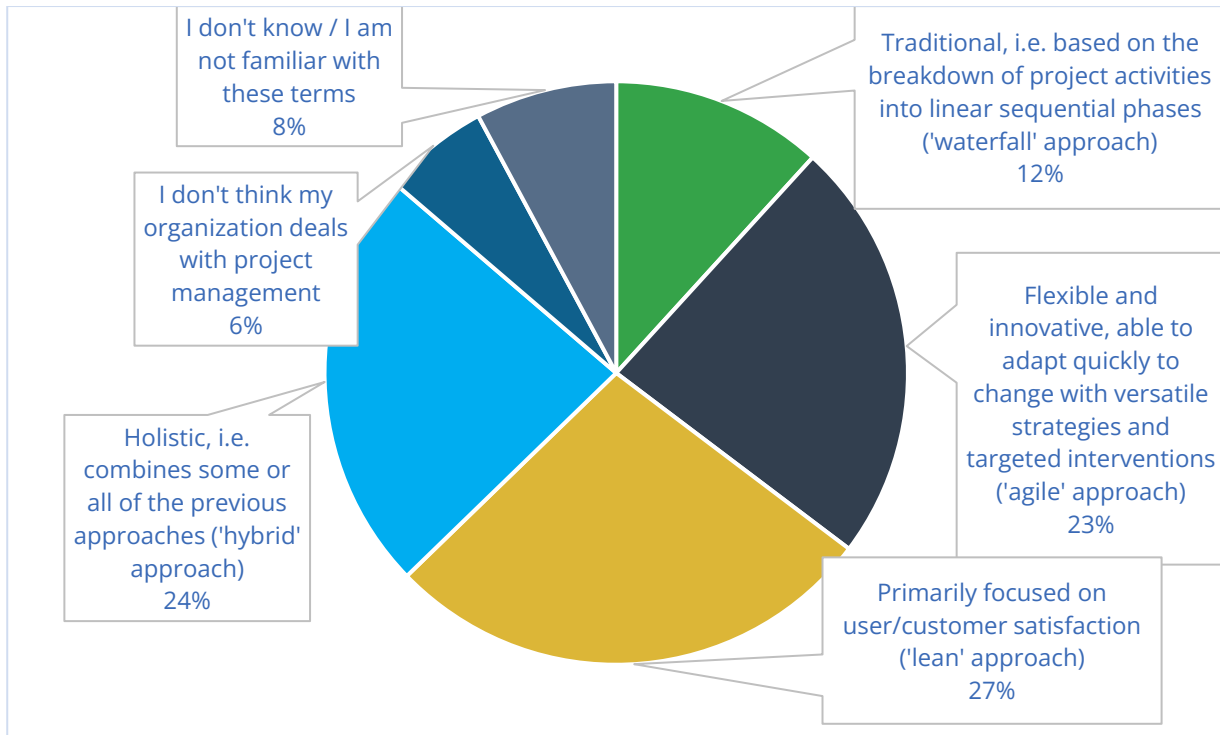


Do you think it is more beneficial for a tourism business to be flexible, manage change and follow the market than to apply medium-long-term planning?

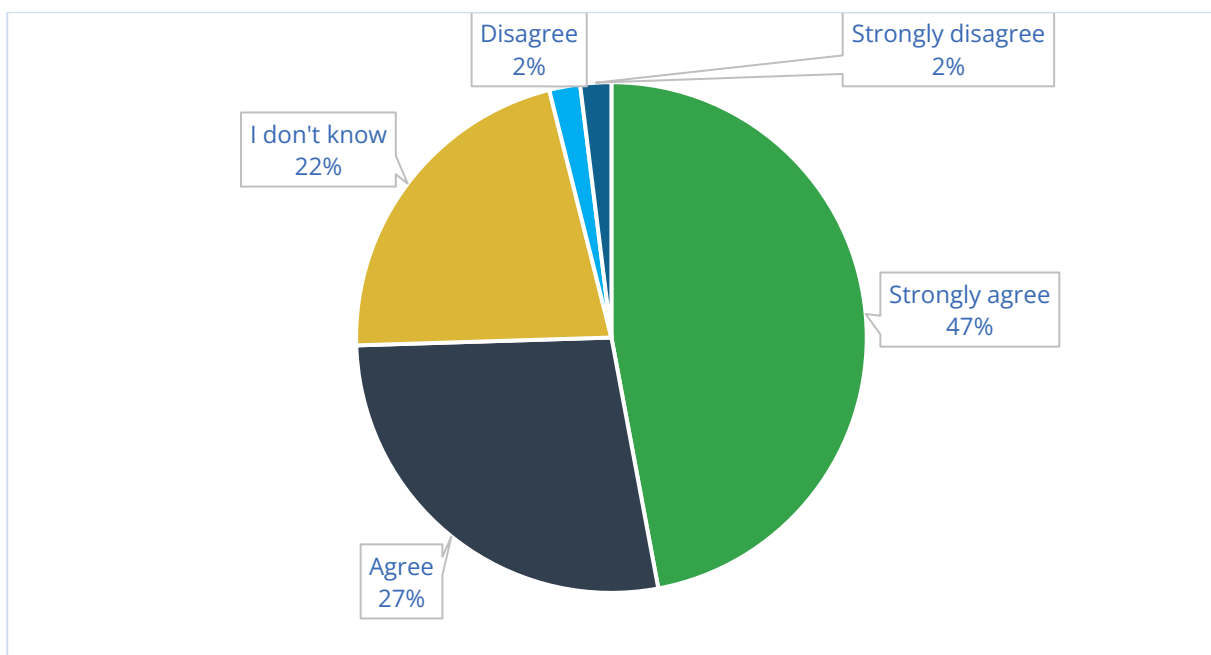




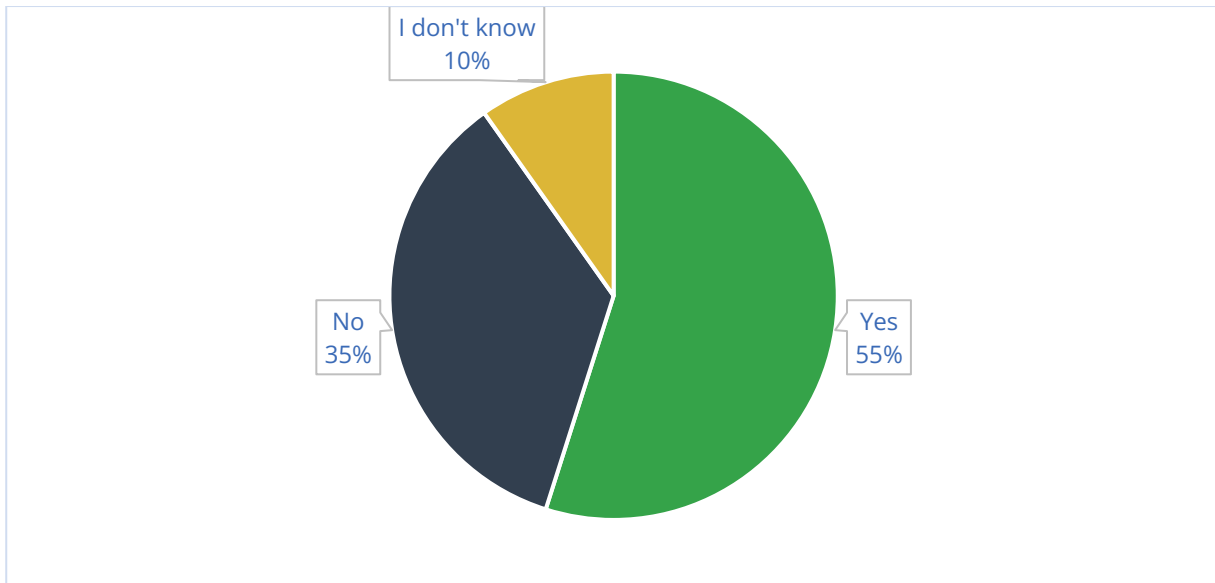
In your organization, the approach to project management (i.e. the use of specific knowledge, skills, tools and techniques to deliver something of value to people) is:



In your opinion, can a hybrid project manager, able to implement planning effectively but also to adapt quickly to changes, be considered a competitive resource for tourism businesses and public bodies responsible for tourism policies?

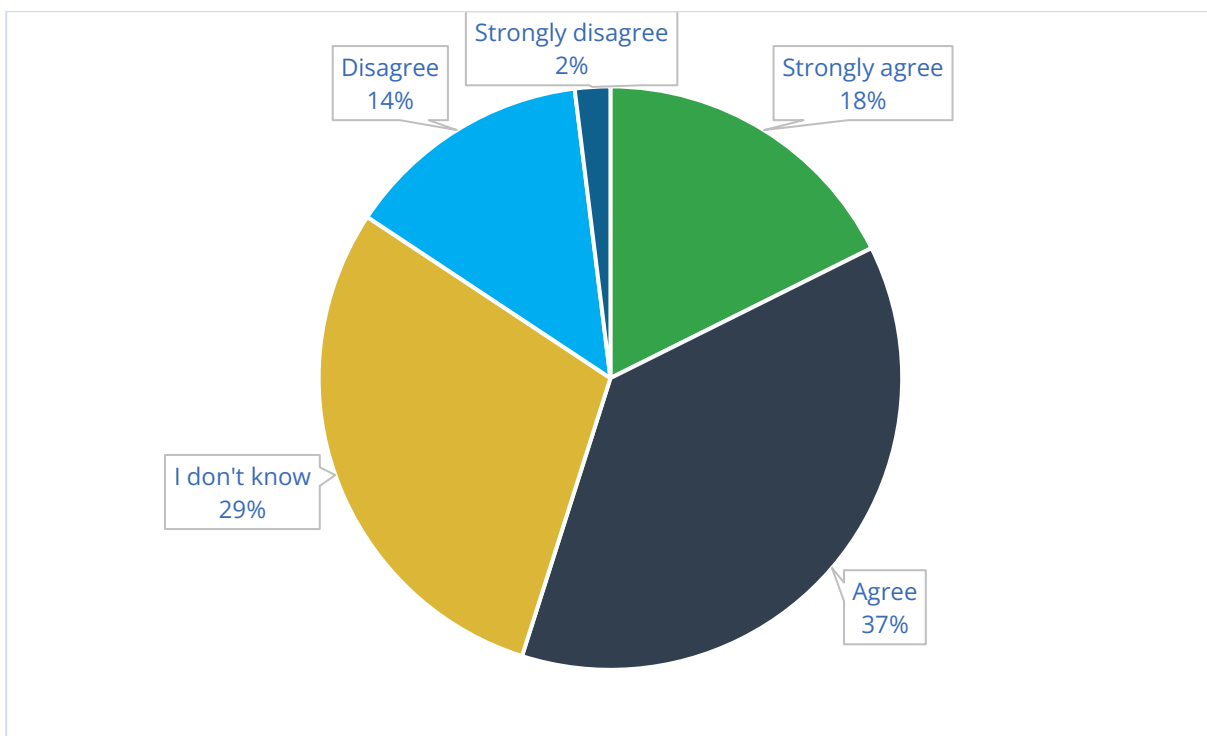


Does your organisation include in its organizational chart an official job position entitled "Project Manager"?

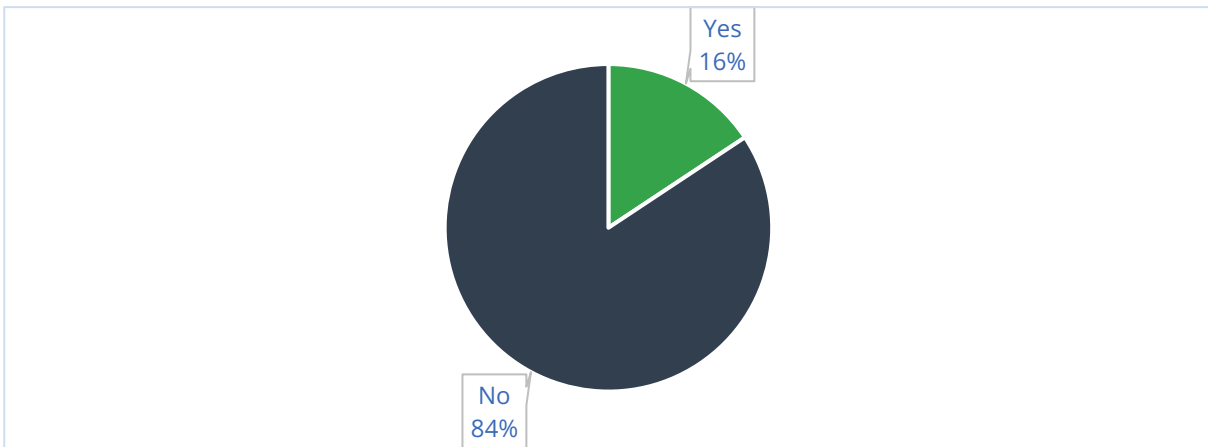


Please indicate you agree with the following statement:

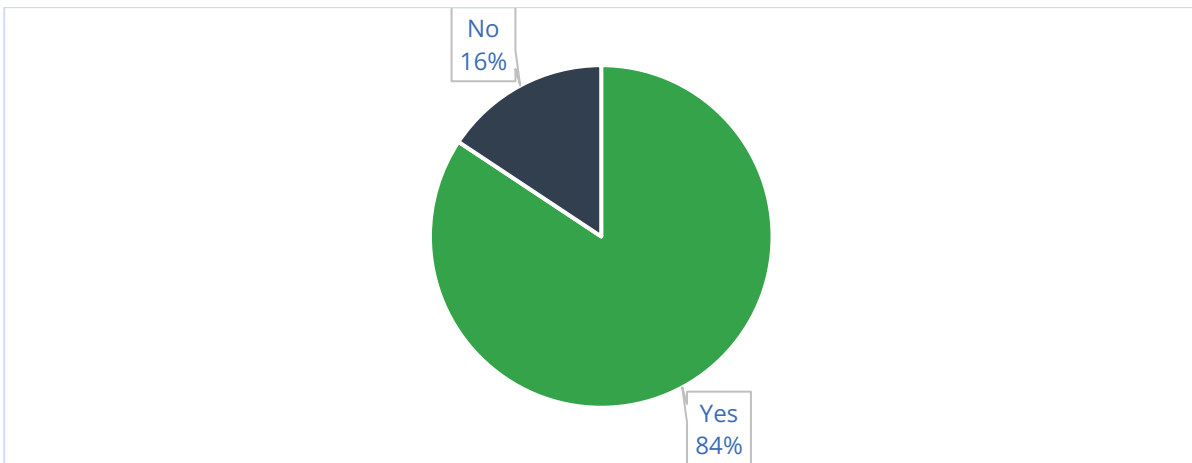
"My project management skills are satisfactory."



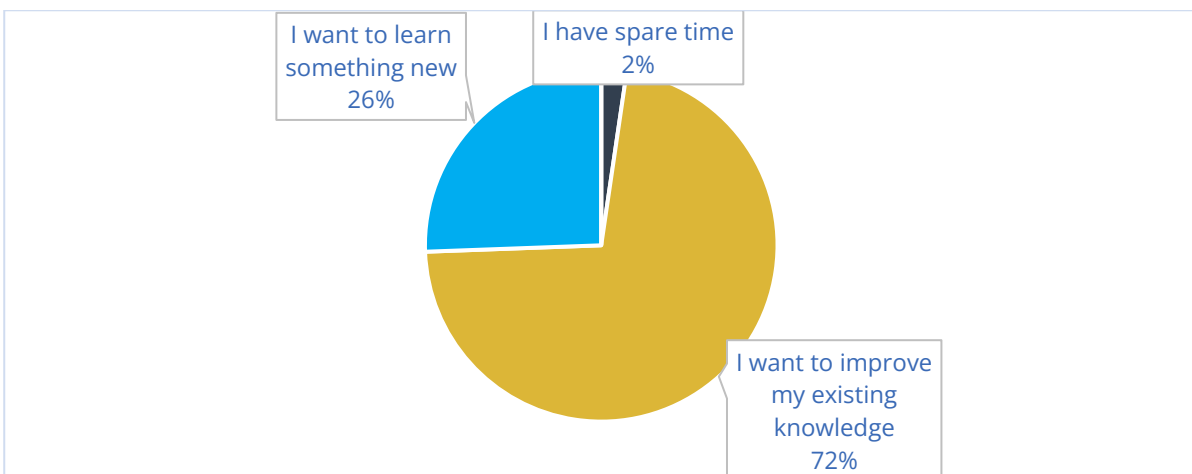
Do you have any certification in project management?



Would you be interested in attending a free training course entitled “Sustainable Hybrid Project Management for the Tourism Sector”?



If yes, please specify why:



## **8. Appendix 2: Interview with the Head of the Higher Education Study Programme of the Faculty of Tourism, University of Maribor**

### **Briefly about the project:**

*This research was launched as the first consultation activity of the project "Sustainable Tourism Innovation Through Hybrid Project Management (HyPro4ST)", a three-year project co-financed by the European Union under the Erasmus+ program, KA2: Cooperation between organizations and institutions: Alliances for innovation. The aim of the project is to develop the profile of the new position "Sustainable and hybrid project manager" for the sustainable tourism sector and to train professionals in the field of sustainable, hybrid, digital, creative and entrepreneurial project management.*

### **Questions discussed:**

#### **1. When did the so-called program "Contemporary Tourist Practice Higher Education Study Program" start?**

The Faculty of Tourism University of Maribor has made a decision on October 1, 2020 to change the Education program for Tourism Studies. They have decided to firstly open two different levels of the program, thus the Higher education level and University level were opened for students to choose. Two new programs emerged Higher education program so called "Contemporary Tourist Practice" and university program so called "Cooperation and Development".

You can find more information on this link: <https://www.ft.um.si/studij/studijski-programi/#sodobne-turisticne-prakse>

I was participating in the Higher-Education program preparation and implementation from 2020. The first evaluation will be made after 3 years, when the first generation of students will graduate. So, the evaluation of the performance for this program can't be made yet.

#### **2. What were the fundamental reasons that led to the preparation of the new study program? "Are these modern trends, policy changes at the EU level, towards a more quality-oriented boutique tourism (as, for example, before, when quantity was at the fore), the need to develop digital skills, care for the environment and sustainable forms of tourism,...?"**

The changing conditions in the tourism industry show the need for new knowledge, skills and competences. Educational institutions must also adapt to this type of situation on the tourist market, which is why the partnership and cooperation of the educational sphere with employers, decision-makers and tourism planners is crucial. We did this as soon as possible, so we can really offer a quality education and prepare youth for the contemporary tourism sector challenges.

Research and the views of prominent representative international institutions show that the answer to today's challenges will come from learning and research, data management and the sustainable development of tourism.

In any case, this is about the connection of necessary competences with current tourism trends.

**3. Has the program been running for more than 3 years and are there already some examples of students who have successfully completed this program? Please indicate the approximate number of such students.**

In the 2022/2023 academic year, the renewed "CTP" program will be fully implemented in all three years for the first time. Thus, the first graduates will complete this program in the current academic year (in 2023).

**4. Do you think that the change of the program was necessary for the successful management and management of the tourism sector in Slovenia?**

*Changes in the environment, society, the crisis caused by the Covid-19 measures, do you think that these are the reasons that need to be taken into account for the quality education of new profiles?*

Of course, the study programs address the current needs and challenges of the tourism sector. However, preparations are already underway for the renewal of the programs. So, there is a constant process of adapting to current and pressing challenges.

Covid-19 also brings certain changes and challenges that must also be taken into account when preparing and/or renewing study programs.

**5. What key skills, competences and knowledge do you develop in young people with the help of this new study program (e.g. digital skills, so-called "soft skills", sustainable orientation, ability to lead or participate in projects)?**

Graduates of the 1st-level professional study program Contemporary tourism practices will acquire the following subject-specific competencies within the study program:



- general knowledge of tourism as a special service activity at the national and international level,
- knowledge of Slovenia as a tourist destination and the most important tourist regions in the world,
- understanding of the basic categories of management and the economy of the company,
- understanding of the basic principles of planning, management and management of tourist destinations and tourist structures,
- the basics of dealing with people at work,
- mastering the basic rules and skills of intercultural and digital communication in tourism,
- communicative competence in three foreign languages, in-depth linguistic knowledge and terminology in the field of tourism,
- the use of the basis of information technologies and the specifics of information solutions in tourism,
- practical knowledge of various forms of tourist products, separating their mission and purpose,
- the ability to design creative tourism products in various fields,
- knowledge of trends in tourism,
- understanding the importance of safety in the contemporary tourist environment,
- practical knowledge of the operations of hotels, tourist establishments, food establishments and destination organizations,
- knowledge of the fundamental organizational and legal characteristics of Slovenian and international tourism,
- knowledge of the concept, process and content of marketing in a tourist organization,
- demonstrating values in accordance with the principles of sustainable tourism and ethical standards,
- evaluation of the quality of services and experiences in tourism.

*Thank you very much for taking the time to answer my questions. I would also like to thank your faculty for agreeing to participate.*

*We are conducting an analysis of the needs of the labor market in tourism, and your faculty will be an example of good practice in Slovenian.*



## 9. Appendix 3: Analysis of the documents in the desk research

Topic Areas of Analysis					
	How sustainability, tourism labour market, skills and training, and project management are reflected in the document	Key trends	Actions to take	Emerging themes	Final considerations
<b>CPOEF, Horwath HTL, &amp; STO. (2022) Strategy for the Digital Transformation of Slovenian Tourism 2022-2026.</b>	<p>The research using a combination of qualitative and quantitative methods have been conducted to define the level of digital maturity of tourism stakeholders and tourism organisation in Slovenia. The strategy builds on the results of this research, providing an understanding of the state of the art in terms of equipment and human resources, information systems and solutions, organisation and the climate needed for digital transformation.</p>	<p>The strategy identifies the key priority areas:</p> <ul style="list-style-type: none"> <li>- strengthening and reorganization of the Slovenian tourism organisation;</li> <li>- national information centre,</li> <li>- establishment of the Slovenian tourist marketplace;</li> <li>- tourist voucher for increasing digital competencies;</li> <li>- smart solutions for companies.</li> </ul>	<ul style="list-style-type: none"> <li>- Introduce digital competencies in the programmes of formal education (prepare content for mandatory credit points in the field of digital competencies at the level of vocational, secondary and higher education programs in tourism; implement digital content at the level of professional, secondary and higher education programs in tourism);</li> <li>- Promote the future digital professions in tourism (promotional materials, promotion on digital and traditional networks)</li> <li>- Tourism industry representatives should be added to the State Digitalisation Council</li> </ul>	<ul style="list-style-type: none"> <li>- digital transformation is key to improving the added value of the industry, and its sustainability</li> <li>- vision of Slovenia as an example of a smart destination that supports sustainable, boutique, personalised and innovative experiences</li> </ul>	<p>The strategy presents the vision and the action plan for Slovenian tourism to become a leader in smart and sustainable tourism offers. It has measures aimed directly at employees' competencies, however, the whole action plan requires improvement of digital and sustainability competencies as well as new levels of cooperation and data sharing.</p> <p>The key digital competencies are listed based on OECD suggestion:</p> <ul style="list-style-type: none"> <li>• General ICT user knowledge</li> <li>• Online communication</li> <li>• Processing and management of electronic sales points and other digital purchasing systems.</li> <li>• Data literacy</li> <li>• "Big data" and analytics</li> <li>• Content creation</li> <li>• Data and system security</li> <li>• Travel and reservation management software</li> </ul>

Topic Areas of Analysis					
	How sustainability, tourism labour market, skills and training, and project management are reflected in the document	Key trends	Actions to take	Emerging themes	Final considerations
<b>Centre of the Republic of Slovenia for vocational education. (2020). System of qualifications in the field of hospitality, hotel management and tourism.</b>	<p>The document lists an overview of all qualifications in tourism in Slovenia. Sustainability is directly mentioned in 10 out of 49 reviewed qualifications, and in 27 qualifications some aspects related to sustainability have been mentioned.</p> <p>Project management skills are mentioned in 5, and some related aspects - in 41 tourism and hospitality qualifications.</p> <p>Digital skills are mentioned in 29 out of 49 reviewed qualifications, mostly in the form of »use of the modern information-communicational technology«, without specific details for any of the qualifications.</p>	<p>Tourism companies lack a qualified workforce. In the next years, the issue will only increase.</p> <p>Seventy-five per cent of all jobs in the hospitality fall under the category of secondary vocational education</p>	<p>Implement apprenticeship programme to align the formal vocational education with the needs of the industry; develop an efficient training system in companies to improve the quality of the vocational education</p>	<p>The document aligns with the Slovenian tourism development strategy and points out the need to align the qualifications with the trends:</p> <ul style="list-style-type: none"> <li>- Sustainable development</li> <li>- Digitalization in tourism</li> <li>- De-seasonality</li> <li>- New luxury and 5-star experiences</li> </ul>	<p>Human resources are one of the most important underused resources in Slovenian tourism. This challenge should be addressed on all levels of formal and informal training, which should include also employers' initiatives for skills utilisation</p>



Topic Areas of Analysis					
	How sustainability, tourism labour market, skills and training, and project management are reflected in the document	Key trends	Actions to take	Emerging themes	Final considerations
<b>The Institute of the Republic of Slovenia for Employment. Youth and the labour market. (2021).</b>	The COVID-19 crisis impacted the most those areas, where the lockdown limited activities: hospitality, tourism and related activities, sports, recreation, entertainment, cultural activities, and other personal services.	<ul style="list-style-type: none"> <li>- negative demographic trends, ageing population;</li> <li>- youth prefers higher education, and less vocational;</li> <li>- secondary, vocational and higher education do not reflect the market needs;</li> <li>- 0 lack of employees is partly covered by foreigners;</li> <li>- while youth is more flexible in terms of employment they were also more impacted by the Covid-19 crisis;</li> <li>- youth is better educated and despite a lack of experience have better prospects for employment than older workers;</li> <li>- unemployment rates were decreasing steadily before the Covid-19 crisis.</li> </ul>	<ul style="list-style-type: none"> <li>-Lifelong career orientation services should be improved;</li> <li>- Promotion of STEM professions;</li> <li>- Revival of the apprenticeship system can efficiently link the needs of employers with the education of young people;</li> <li>- Improve practical experience during studies and systemically organise internships;</li> <li>- Improve work with long-term unemployed youth;</li> <li>- Personalized and coordinated measures for different subgroups;</li> <li>- Need for career counselling for returning to education;</li> <li>- promotion with the modern tools that young people use, such as social media.</li> </ul>	There is a risk of losing youth as potential employees if they are offered jobs below their qualification level, unstable employment, and experience an unsuccessful job search	Youth is a critical group for employment in tourism. The report (2015-2020) shows that several hospitality-related, mostly low-skilled jobs are listed among the problematic unemployment qualifications - in terms of duration of the job search and number of unemployed (waiters, salespersons, cleaners, kitchen assistants, cooks, drivers). At the same time, there is a huge demand for these employees. The gap might suggest that there is a mismatch between what the employers and employees expect and offer to each other.



Topic Areas of Analysis					
	How sustainability, tourism labour market, skills and training, and project management are reflected in the document	Key trends	Actions to take	Emerging themes	Final considerations
<b>CPOEF. (2022). Evaluation of the project "Strengthening counselling work with young people" at the Institute of Employment of the Republic of Slovenia.</b>	The report evaluates the project for optimisation of the work with the youth of the Institute of Unemployment. Through the multiple research methods, it covers the perspective of the consultants and job seekers. It offers insights on work with unemployed youth and several recommendations to improve the situation.	Youth workers are characterised by: On average, they are more motivated for employment; Promotion opportunities are more important to them; They need experience; They are interested in entrepreneurship; They need guidance. The key obstacles are: A lack of experience; Transport problems; Child care.	On-the-job training Encouraging entrepreneurship Reimbursement for first employment Non-formal education and training Development of similar programmes for the work with the other groups (older workers, those who have been unemployed for a longer time)	- The report emphasizes the need for enabling opportunities for job seekers to gain work experience and connect with potential employers; - it also stresses the importance of including employers in the work of educational and job-search assisting institutions; - counsellors needed more knowledge in ICT, psychology, and sociology to work with young job seekers.	Accounting for the perspective of training providers, trainees, and potential employers is crucial for improvement of the employment opportunities for youth as well as for other vulnerable groups.

Topic Areas of Analysis					
	How sustainability, tourism labour market, skills and training, and project management are reflected in the document	Key trends	Actions to take	Emerging themes	Final considerations
<b>Office of the Government of the Republic of Slovenia for Development and European Cohesion Policy. (2022). Slovenian strategy of sustainable smart specialization S5.</b>	<p>S5 includes 5 development areas for Slovenia:</p> <ol style="list-style-type: none"> <li>1. Green Transition</li> <li>2. Digital transformation</li> <li>3. Smart, sustainable, inclusive growth</li> <li>4. Healthcare and social security.</li> </ol> <p>The staff training is addressed under area 3 with "improving the competencies, in particular, digital and those required by new qualifications and green transition"</p>	<p>- introducing SRIPs (strategic research and innovation partnerships), in particular, for tourism</p> <p>- building and upgrading value chains domestically and linking them internationally,</p> <p>- preparing complex joint R&amp;D projects</p> <p>- opening the door to international R&amp;D and innovation platforms.</p>	<p>Reforming higher education for a green and resilient transition to Society 5.0 (a system that is responsive to environmental needs and creates a highly skilled workforce for the jobs of the future)</p> <p>A comprehensive transformation (sustainability and resilience) of green and digital education</p> <p>Implementation of pilot projects, the results of which will be the basis for the preparation of a platform for the reform of higher education for a green and resilient transition to Society 5.0</p> <p>Strengthening cooperation between the education system and the labour market</p>	<p>10 priority areas identified as:</p> <p>Smart cities and communities,</p> <p>Horizontal network of information and communication technologies,</p> <p>Health and healthcare,</p> <p>Smart buildings and houses with a wooden chains,</p> <p>Sustainable food production,</p> <p>Networks for the transition to a circular economy,</p> <p>Sustainable tourism,</p> <p>Mobility,</p> <p>Factories of the future,</p> <p>Materials as final products.</p>	<p>A big stress is put on the need for the digital and green transition. This strategy put the participatory approach and cooperation with actors at the centre, allowing countries to identify their specialization areas, based on competitive advantages and offering mechanisms to finance them. Investments in people's knowledge and skills are the prerequisite for efficient investments in research and development, new technologies, products and processes, and digitization, as well as in promoting entrepreneurial and innovative activities and competitiveness of companies.</p>
<b>MGRT. (2022). Strategy of Slovenian Tourism 2022 – 2028.</b>	<p>The strategy includes an analysis of the human resources in tourism in Slovenia. It points out that the situation and development dynamics in the broader tourism sector in Slovenia are at the lower end of the satisfactory range, mostly due to the high</p>	<p>The lack of emphasis on training and education for the success of Slovenian tourism by key decision-makers in Slovenian tourism, the lack of highlighting the importance of this area in the tourism system and the resulting decrease in</p>	<p>Through educational awareness and motivational and financial incentives, interest in green business models should be strengthened throughout the tourism industry.</p> <p>Address both short-term attracting and integration of personnel into the industry as</p>	<p>The success of the tourism industry will depend on its ability to adopt the digital technologies</p> <p>Openness and data sharing</p> <p>Digitalization is not a replacement, but support for the hospitality</p>	



Topic Areas of Analysis					
	How sustainability, tourism labour market, skills and training, and project management are reflected in the document	Key trends	Actions to take	Emerging themes	Final considerations
	seasonality and increasing pressure on the destinations, short stay duration, consequences of Covid-19 crisis and lack of tourism employees.	competencies and trust in educational institutions in the field of tourism and hospitality	well as long-term planning and career guidance, further updating of curricula and accelerated strengthening of competencies. Transformation of human resources management and the creation of more balanced working conditions.	Digital tools for the decarbonisation process	
<b>Mihalic et al.. (2017) Strategy of the sustainable growth of Slovenian Tourism 2017-2021.</b>	Human resources are one of the six strategic directions defined by this strategy. Besides the general focus on sustainability, the part dedicated to human resources specifically highlights the need to create added value for the employees, development of the innovative, sustainable and holistic tourism products and the critical role of cooperation between state institutions and businesses.	<p>Tourism businesses are lacking professional staff; the demand for vocationally trained staff is expected to rise in the coming years. Over the last ten years, companies have not systematically invested in the training of their own employees.</p> <p>Rewards, promotions and other forms of incentives for staff in the hospitality and tourism sector are insufficient. The vocational standards at the level of vocational education are too general and do not express the needs of the economy. At the level of tertiary</p>	<p>The strategy defines the following priorities for human resources development:</p> <ul style="list-style-type: none"> <li>- Vocational education in hospitality and tourism (new hotel schools, modernisation of standards and specialisation of vocational education),</li> <li>- Tertiary education programmes (establishing a hotel business programme, strengthening middle-management programmes in tourism, improving the data collection system for tourism),</li> <li>- Promotion of vocational training in tourism (improving the image of the professions in tourism and hospitality),</li> <li>- On-the-job training (establishment of a national centre for on-the-job training in tourism, training for small</li> </ul>	<p>Sustainable Tourism: a focus on minimizing the negative impacts of tourism on the environment and local communities; promote responsible tourism practices, including the use of eco-friendly transportation, energy-efficient buildings, and waste reduction.</p> <p>Tourism Product Development: a need to diversify Slovenia's tourism offerings beyond its natural and cultural attractions, and to develop new tourism products that cater to specific market segments; promote niche tourism products, such as</p>	The strategy recognizes the role of professional education for tourism and suggests the areas where improvement should be made to overcome the employees' crisis.

Topic Areas of Analysis					
	How sustainability, tourism labour market, skills and training, and project management are reflected in the document	Key trends	Actions to take	Emerging themes	Final considerations
		education, there is no program in the field of hotel management (suitable for middle and senior hotel management)	specialised hotels, training in information and communication technologies, - Development of a model for promoting an appropriate human resources policy.	<p>wellness, gastronomy, and adventure tourism, that can help to attract higher-spending visitors.</p> <p>Digitalization and Innovation: Leveraging technology to enhance the visitor experience, improve operational efficiency, and increase competitiveness.</p> <p>Destination Branding and Promotion: strengthen Slovenia's tourism brand identity and enhance its visibility in key source markets through targeted marketing campaigns, events, and partnerships.</p> <p>Human Resource Development: promote lifelong learning, provide training and development opportunities, and improve working conditions and remuneration in the tourism sector.</p>	

Topic Areas of Analysis					
	How sustainability, tourism labour market, skills and training, and project management are reflected in the document	Key trends	Actions to take	Emerging themes	Final considerations
<b>Teachers and trainers in a changing world – Slovenia: Building up competencies for inclusive, green and digitalised vocational education and training (VET) (2022).</b>	The report briefly summarises the current state of VET teaching in Slovenia, with references to the legislation and other projects focusing on the digital skills for remote and blended teaching, green skills and preventing early leaving from VET. The overview is focused on work-based learning.	Slovenia is facing problems with the ageing teaching force, in upper secondary education, the share of teachers below 30 years of age is below 5% (2018 data), compared to 2005 data the share has decreased by approximately 5%. The reason for the situation is that firstly that generation of students is smaller and secondly that during the last economic crisis employment of young teachers was limited.	The promotion of The teaching (in VET) profession. Create appropriate systemic starting points for changes in The education system, that will allow for a better continuation of educational practices that have been altered as a consequence of health and other longer-lasting social and environmental crises.	-	The report highlights the lack of teachers, lack of students and lack of efficient schemes of collaboration between schools and businesses for the organisation of work-based learning.



## Anexo I: Resultados totais do inquérito

### Annex I. Total Survey Results

Frequencies per country per survey question.

ID	Country	Abbreviation	Answers Collected
1	Croatia	HR	69
2	Greece	EL	55
3	Hungary	HU	51
4	Italy	IT	51
5	Portugal	PT	87
6	Slovenia	SI	51
<b>Total</b>	<b>6</b>	<b>6</b>	<b>364</b>

Sector	Private sector (including trade associations)	Public sector	NGO/ Not-for-profit organization	Educational	Other	Total
HR	28	24	8	7	2	69
EL	34	9	2	7	3	55
HU	20	6	12	13	0	51
IT	23	8	9	6	5	51
PT	84	3	0	0	0	87
SI	20	13	2	11	5	51
<b>Total</b>	<b>209</b>	<b>63</b>	<b>33</b>	<b>44</b>	<b>15</b>	<b>364</b>

Job/ Role	Project manager	Travel agency manager	Destination manager	Tour organizer	Travel consultant	Tour operator	Entrepreneur	Corporate Social Responsibility Manager	Office Administrator/ Support	Professional in the Accommodation/Hospitality Industry	Professional in the Creative and Entertainment Activities	Professional in the Transportation Industry	Professional in the Food & Beverage Industry (serving tourism)	Professional in the Business Support Services (accountant, marketer, business consultant etc.)	Student	Adult Trainer	Vocational Education and Training Provider	Higher Education Professor	Other	Total
HR	6	0	16	0	0	0	5	2	6	0	0	0	5	2	8	0	0	7	12	69
EL	5	0	1	0	0	2	9	0	6	13	0	0	0	1	3	5	3	0	7	55
HU	7	0	0	2	2	6	9	0	3	3	0	0	1	0	0	8	6	0	4	51
IT	11	1	0	0	0	1	10	0	6	5	0	0	0	1	1	0	3	6	6	51
PT	7	6	0	0	3	7	36	1	2	17	1	0	0	2	0	0	0	1	4	87
SI	8	0	3	0	2	0	4	0	5	2	1	0	0	1	8	3	1	7	6	51
<b>Total</b>	<b>44</b>	<b>7</b>	<b>20</b>	<b>2</b>	<b>7</b>	<b>16</b>	<b>73</b>	<b>3</b>	<b>28</b>	<b>40</b>	<b>2</b>	<b>0</b>	<b>6</b>	<b>7</b>	<b>20</b>	<b>16</b>	<b>13</b>	<b>21</b>	<b>39</b>	<b>364</b>

Age	18-24	25-34	35-49	50-64	65-74	75+	Total
HR	4	11	38	14	2	0	69
EL	3	6	30	15	1	0	55
HU	1	9	26	11	4	0	51
IT	1	15	19	10	6	0	51
PT	2	4	50	27	3	1	87
SI	7	12	27	5	0	0	51



<b>Total</b>	<b>18</b>	<b>57</b>	<b>190</b>	<b>82</b>	<b>16</b>	<b>1</b>	<b>364</b>
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Gender	Female	Male	Transmale	Transfemale	Non-conforming	Decline to answer	Other	Total
HR	48	21	0	0	0	0	0	69
EL	32	22	0	0	0	1	0	55
HU	28	22	0	0	1	0	0	51
IT	21	30	0	0	0	0	0	51
PT	48	38	0	0	0	1	0	87
SI	39	12	0	0	0	0	0	51
<b>Total</b>	<b>216</b>	<b>145</b>	<b>0</b>	<b>0</b>	<b>1</b>	<b>2</b>	<b>0</b>	<b>364</b>

Q1: Sustainable tourism practices	Biodiversity conservation actions (e.g. better management of scarce natural resources)	Actions to tackle/mitigate climate change (e.g. improve the energy efficiency)	Actions to develop the circular economy (e.g. prioritize sustainable food approaches for circularity)	Actions to improve governance and finance (e.g. steer recovery funds towards tourism)	Actions to improve people's well-being and health (e.g. connect hygiene with sustainability)	Actions to promote social inclusion (e.g. support and involve vulnerable groups)	Other	Total
HR	38	39	43	27	20	18	1	186
EL	22	27	26	20	19	15	2	131
HU	16	17	18	24	22	13	0	110
IT	15	28	20	22	16	19	4	124
PT	54	59	46	25	26	26	2	238
SI	28	24	13	19	7	10	21	122
<b>Total</b>	<b>173</b>	<b>194</b>	<b>166</b>	<b>137</b>	<b>110</b>	<b>101</b>	<b>30</b>	<b>911</b>

Q2: Reasons to address sustainability issues	Align with our goals, mission and values	Meets consumer/ customer expectations	Attract, motivate and retain employees	Develop new growth opportunities	Response to competitive pressure	Improve operational efficiency	Build, maintain or improve corporate reputation	Comply with regulatory requirements	Other	Total
HR	43	33	17	38	7	14	21	12	1	186
EL	22	27	18	22	6	18	15	5	2	135
HU	19	19	10	19	11	21	13	11	0	123
IT	21	19	14	31	0	19	13	10	3	130
PT	66	46	14	32	3	41	33	6	2	243
SI	28	24	13	19	7	10	21	6	2	130
<b>Total</b>	<b>199</b>	<b>168</b>	<b>86</b>	<b>161</b>	<b>34</b>	<b>123</b>	<b>116</b>	<b>50</b>	<b>10</b>	<b>947</b>

Q3: Priorities on social sustainability actions	Promotion of youth employment, particularly for young women	Measures that facilitate the transition of workers from the informal to the formal economy	Inclusion of workers with disabilities in the tourism labour force	Integration of migrants in the tourism labour force	Promotion of a general environment of zero tolerance of violence and harassment, including gender-based violence	Ensure safety in the workplace	Ensure maternity protection	Other	Total
HR	41	21	28	14	37	40	26	1	208
EL	32	22	31	9	20	34	15	0	163
HU	25	24	20	11	13	20	20	0	133
IT	40	15	17	18	24	25	17	0	156
PT	23	28	28	20	66	55	19	2	241
SI	35	22	15	15	27	30	14	4	162
<b>Total</b>	<b>196</b>	<b>132</b>	<b>139</b>	<b>87</b>	<b>187</b>	<b>204</b>	<b>111</b>	<b>7</b>	<b>1063</b>

Q4: Actions to revitalize tourism	Green transition	Safeguard of the health of residents and visitors	Digital transition and smart technologies (e.g. open data)	Skills, education and training	Public administration and governance	Competitiveness	Financial sector and access to finance	Involvement of local communities	Other	Total
HR	49	26	34	45	13	24	11	45	2	249
EL	29	29	31	41	10	13	14	31	2	200
HU	20	6	19	22	24	18	15	14	0	138
IT	20	14	28	33	18	11	16	30	0	170
PT	58	24	23	58	13	21	24	57	1	279
SI	34	5	21	32	6	13	15	32	3	161
<b>Total</b>	<b>210</b>	<b>104</b>	<b>156</b>	<b>231</b>	<b>84</b>	<b>100</b>	<b>95</b>	<b>209</b>	<b>8</b>	<b>1197</b>

Q5: Skills / Abilities	Focus on the client	Technological and digital capabilities	Creativity and innovation	Flexibility and adaptability	Ability to work in a team	Commitment to work	Other	Total
HR	46	30	50	56	39	34	2	257
EL	42	34	32	45	38	29	2	222
HU	39	11	26	36	27	18	0	157
IT	43	25	19	27	23	23	0	160
PT	65	20	89	69	56	44	0	343
SI	34	18	36	43	37	26	2	196
<b>Total</b>	<b>269</b>	<b>138</b>	<b>252</b>	<b>276</b>	<b>220</b>	<b>174</b>	<b>6</b>	<b>1335</b>

Q6: Environmental skills to improve competitiveness of tourism systems	Promotion of environmentally friendly activities and products	Promotion of sustainable forms of transport (e.g. public transport)	Knowledge of climate change	Ability to minimize use and maximize energy and water efficiency consumption	Ability to manage waste, waste water, recycling and composting	Conservation of biodiversity	Other	Total
HR	48	41	16	50	58	39	1	253
EL	39	20	27	33	37	28	2	186
HU	24	26	21	29	29	12	0	141
IT	32	37	14	37	32	26	1	179
PT	71	30	26	56	68	54	1	306
SI	35	36	18	35	37	25	3	189
<b>Total</b>	<b>249</b>	<b>190</b>	<b>122</b>	<b>240</b>	<b>261</b>	<b>184</b>	<b>8</b>	<b>1254</b>

Q7: Digital skills to improve competitiveness of tourism systems	Operating system usage and computer programming skills	Skills for implementing online safety procedures	Online marketing and communication skills	Desktop publishing skills (for designing brochures, catalogues, etc.)	Website development skills	Social media skills	Data analytics, business intelligence, big data skills	Artificial intelligence and robotics skills	Other	Total
HR	20	24	61	17	26	44	36	11	0	239
EL	21	18	39	16	12	36	21	5	2	170
HU	10	12	34	18	27	28	11	8	0	148
IT	20	12	43	11	15	37	22	4	0	164
PT	27	11	72	21	35	39	36	11	1	253
SI	10	15	45	18	6	16	30	3	2	145
<b>Total</b>	<b>108</b>	<b>92</b>	<b>294</b>	<b>101</b>	<b>121</b>	<b>200</b>	<b>156</b>	<b>42</b>	<b>5</b>	<b>1119</b>

Q8: Skills improvement (entrepreneurship)	Creativity and innovation	Design thinking methodology for developing customer-centred products/ services/ experiences	Business strategy development	Business model development	Branding strategy development	Marketing strategy development	Corporate social responsibility	Other	Total
HR	34	38	24	16	34	41	20	1	208
EL	25	33	32	24	28	32	15	0	189
HU	25	14	18	14	17	25	13	0	126
IT	23	17	21	11	17	31	18	1	139
PT	39	37	34	35	34	48	30	1	258
SI	26	30	17	21	15	23	16	3	151
<b>Total</b>	<b>172</b>	<b>169</b>	<b>146</b>	<b>121</b>	<b>145</b>	<b>200</b>	<b>112</b>	<b>6</b>	<b>1071</b>

Q9: Skills improvement (soft skills)	Critical thinking	Exploratory thinking	Change management	Flexibility/ Adaptability	Emotional intelligence	Leadership	Communication	Idea pitching (the art of presenting)	Collaboration	Networking	Learning how to learn	Promoting Diversity, Equity and Inclusion (DEI) in the workplace	Customer service	Other	Total
HR	24	27	31	16	30	20	22	25	13	28	10	16	4	0	266
EL	10	16	22	16	12	23	20	26	8	14	14	16	10	1	208
HU	11	12	18	21	14	20	20	12	12	17	11	7	6	0	181
IT	7	4	19	13	10	15	16	13	7	16	4	16	8	0	148
PT	19	25	28	19	18	22	30	22	7	25	8	13	23	1	260
SI	21	18	23	11	22	23	18	23	9	17	11	13	4	1	214
<b>Total</b>	<b>92</b>	<b>102</b>	<b>141</b>	<b>96</b>	<b>106</b>	<b>123</b>	<b>126</b>	<b>121</b>	<b>56</b>	<b>117</b>	<b>58</b>	<b>81</b>	<b>55</b>	<b>3</b>	<b>1277</b>

Q10: Effective training forms	Through face-to-face training	Through online training	Through tutors at work	Learning-by-doing	Other	Total
HR	16	1	28	24	0	69
EL	14	3	26	12	0	55
HU	15	12	14	9	1	51
IT	17	3	17	10	4	51
PT	26	12	21	28	0	87
SI	15	5	16	15	0	51
<b>Total</b>	<b>103</b>	<b>36</b>	<b>122</b>	<b>98</b>	<b>5</b>	<b>364</b>

Q11: Practices used to perform daily tasks	Project management platforms (e.g. MS Project, Basecamp, Jira etc)	Specific project management templates (e.g. project charter, stakeholders register, status report, meeting agenda/minutes etc.)	Key performance indicators for measuring quality, impact and success	I do not implement any of these practices	Other	Total
HR	4	22	27	31	0	84
EL	9	18	11	29	3	70
HU	12	8	8	28	0	56
IT	9	19	18	21	0	67
PT	4	17	25	53	0	99
SI	11	18	16	17	3	65
<b>Total</b>	<b>49</b>	<b>102</b>	<b>105</b>	<b>179</b>	<b>6</b>	<b>441</b>

Q12A: Extend of using processes to implement projects and/or daily tasks: Project Integration Management (coordinating all elements of a project, including tasks, resources, stakeholders and deliverables)	Not at all	To some extent	Greatly	I don't know / I am not familiar with these terms	Total
HR	6	29	31	3	69
EL	13	22	18	2	55
HU	13	19	10	9	51
IT	4	19	27	1	51
PT	23	50	14	0	87
SI	5	26	15	5	51
<b>Total</b>	<b>64</b>	<b>165</b>	<b>115</b>	<b>20</b>	<b>364</b>

Q12B: Extend of using processes to implement projects and/or daily tasks: Project Scope Management (defines and outlines all of the work that is included within a project, including objectives, tasks, outputs and deadlines)	Not at all	To some extent	Greatly	I don't know / I am not familiar with these terms	Total
HR	4	26	36	3	69
EL	9	20	23	3	55
HU	15	18	8	10	51
IT	3	16	30	2	51
PT	18	54	15	0	87
SI	4	21	23	3	51
<b>Total</b>	<b>53</b>	<b>155</b>	<b>135</b>	<b>21</b>	<b>364</b>

Q12C: Extend of using processes to implement projects and/or daily tasks: Project Time Management (processes required for the on-time completion of the project)	Not at all	To some extent	Greatly	I don't know / I am not familiar with these terms	Total
HR	6	17	43	3	69
EL	6	22	23	4	55
HU	8	12	25	6	51
IT	3	17	30	1	51
PT	16	41	30	0	87
SI	3	18	25	5	51
<b>Total</b>	<b>42</b>	<b>127</b>	<b>176</b>	<b>19</b>	<b>364</b>

Q12D: Extend of using processes to implement projects and/or daily tasks: Project Cost Management (processes involved in planning, estimating, budgeting and controlling costs)	Not at all	To some extent	Greatly	I don't know / I am not familiar with these terms	Total
HR	6	13	48	2	69
EL	7	26	17	5	55
HU	10	15	22	4	51
IT	5	24	20	2	51
PT	13	40	34	0	87
SI	5	16	24	6	51
<b>Total</b>	<b>46</b>	<b>134</b>	<b>165</b>	<b>19</b>	<b>364</b>



Q12E: Extend of using processes to implement projects and/or daily tasks: Project Risk Management (the process of identifying, analysing and responding to any risks that arise)	Not at all	To some extent	Greatly	I don't know / I am not familiar with these terms	Total
HR	11	32	25	1	69
EL	14	31	8	2	55
HU	15	21	8	7	51
IT	5	16	25	5	51
PT	24	44	19	0	87
SI	12	23	11	5	51
<b>Total</b>	<b>81</b>	<b>167</b>	<b>96</b>	<b>20</b>	<b>364</b>

Q12F: Extend of using processes to implement projects and/or daily tasks: Project Quality Management (the process of continually measuring the quality of all activities and taking corrective actions to achieve the desired quality)	Not at all	To some extent	Greatly	I don't know / I am not familiar with these terms	Total
HR	13	26	27	3	69
EL	9	31	10	5	55
HU	12	21	13	5	51
IT	4	14	30	3	51
PT	16	41	30	0	87
SI	5	28	13	5	51
<b>Total</b>	<b>59</b>	<b>161</b>	<b>123</b>	<b>21</b>	<b>364</b>

Q12G: Extend of using processes to implement projects and/or daily tasks: Project Procurement Management (processes required to purchase or acquire the products, services or results needed from outside the project team)	Not at all	To some extent	Greatly	I don't know / I am not familiar with these terms	Total
HR	12	21	33	3	69
EL	15	17	17	6	55
HU	21	18	7	5	51
IT	6	22	20	3	51
PT	19	49	19	0	87
SI	9	21	14	7	51
<b>Total</b>	<b>82</b>	<b>148</b>	<b>110</b>	<b>24</b>	<b>364</b>

Q12H: Extend of using processes to implement projects and/or daily tasks: Project Human Resource Management (includes the organization and management of the project team – assigning roles and responsibilities)	Not at all	To some extent	Greatly	I don't know / I am not familiar with these terms	Total
HR	7	21	39	2	69
EL	5	23	24	3	55
HU	15	16	13	7	51
IT	8	19	20	4	51
PT	14	43	30	0	87
SI	8	17	22	4	51
<b>Total</b>	<b>57</b>	<b>139</b>	<b>148</b>	<b>20</b>	<b>364</b>

Q12I: Extend of using processes to implement projects and/or daily tasks: Project Communications Management (processes required to ensure timely and appropriate generation, collection, distribution, storage, retrieval and ultimate disposal of project information)	Not at all	To some extent	Greatly	I don't know / I am not familiar with these terms	Total
HR	10	24	33	2	69
EL	8	28	16	3	55
HU	9	21	16	5	51
IT	4	24	21	2	51
PT	20	54	13	0	87
SI	4	20	22	5	51
<b>Total</b>	<b>55</b>	<b>171</b>	<b>121</b>	<b>17</b>	<b>364</b>

Q13: Flexibility and manage change or medium-long term planning?	Strongly Agree	Agree	I don't know	Disagree	Strongly Disagree	Total
HR	27	23	6	12	1	69
EL	23	18	10	1	3	55
HU	11	14	13	7	6	51
IT	14	18	11	6	2	51
PT	28	38	6	15	0	87
SI	16	16	13	4	2	51
<b>Total</b>	<b>119</b>	<b>127</b>	<b>59</b>	<b>45</b>	<b>14</b>	<b>364</b>

Q14: Project Management Approach	Traditional, i.e. based on the breakdown of project activities into linear sequential phases ('waterfall' approach)	Flexible and innovative, able to adapt quickly to change with versatile strategies and targeted interventions ('agile' approach)	Primarily focused on user/customer satisfaction ('lean' approach)	Holistic, i.e. combines some or all of the previous approaches ('hybrid' approach)	I don't think my organization deals with project management	I don't know / I am not familiar with these terms	Other	Total
HR	15	13	11	19	6	5	0	69
EL	8	13	7	14	8	5	0	55
HU	14	8	10	7	9	3	0	51
IT	10	22	5	12	0	2	0	51
PT	4	24	13	31	7	8	0	87
SI	6	12	14	12	3	4	0	51
<b>Total</b>	<b>57</b>	<b>92</b>	<b>60</b>	<b>95</b>	<b>33</b>	<b>27</b>	<b>0</b>	<b>364</b>

Q15A: Extend of Project Management methodologies used: Waterfall Methodology	Not at all	To some extent	Greatly	I don't know / I am not familiar with these terms	Total
HR	10	24	7	28	69
EL	21	22	4	8	55
HU	10	13	8	20	51
IT	8	23	13	7	51
PT	18	32	4	33	87
SI	8	18	7	18	51
<b>Total</b>	<b>75</b>	<b>132</b>	<b>43</b>	<b>114</b>	<b>364</b>

Q15B: Extend of Project Management methodologies used: Agile Methodology	Not at all	To some extent	Greatly	I don't know / I am not familiar with these terms	Total
HR	12	22	5	30	69
EL	14	24	8	9	55
HU	19	8	3	21	51
IT	6	23	17	5	51
PT	16	26	18	27	87
SI	9	11	13	18	51
<b>Total</b>	<b>76</b>	<b>114</b>	<b>64</b>	<b>110</b>	<b>364</b>

Q15C: Extend of Project Management methodologies used: Hybrid Methodology	Not at all	To some extent	Greatly	I don't know / I am not familiar with these terms	Total
HR	11	19	14	25	69
EL	22	20	6	7	55
HU	18	8	6	19	51
IT	6	29	11	5	51
PT	15	19	23	30	87
SI	8	12	12	19	51
<b>Total</b>	<b>80</b>	<b>107</b>	<b>72</b>	<b>105</b>	<b>364</b>

Q15D: Extend of Project Management methodologies used: Green PM Methodology	Not at all	To some extent	Greatly	I don't know / I am not familiar with these terms	Total
HR	17	18	3	31	69
EL	18	18	8	11	55
HU	20	6	1	24	51
IT	13	13	9	16	51
PT	17	17	4	49	87
SI	9	10	6	26	51
<b>Total</b>	<b>94</b>	<b>82</b>	<b>31</b>	<b>157</b>	<b>364</b>

Q15E: Extend of Project Management methodologies used: Scrum Methodology	Not at all	To some extent	Greatly	I don't know / I am not familiar with these terms	Total
HR	19	10	1	39	69
EL	24	8	2	21	55
HU	20	5	2	24	51
IT	15	13	6	17	51
PT	22	15	1	49	87
SI	14	7	1	29	51
<b>Total</b>	<b>114</b>	<b>58</b>	<b>13</b>	<b>179</b>	<b>364</b>

Q15F: Extend of Project Management methodologies used: PMBOK Methodology	Not at all	To some extent	Greatly	I don't know / I am not familiar with these terms	Total
HR	15	16	8	30	69
EL	23	15	3	14	55
HU	22	5	3	21	51
IT	14	19	6	12	51
PT	24	12	0	51	87
SI	12	5	2	32	51
<b>Total</b>	<b>110</b>	<b>72</b>	<b>22</b>	<b>160</b>	<b>364</b>

Q15G: Extend of Project Management methodologies used: CPM Methodology	Not at all	To some extent	Greatly	I don't know / I am not familiar with these terms	Total
HR	17	16	3	33	69
EL	25	10	3	17	55
HU	23	3	5	20	51
IT	13	13	13	12	51
PT	24	15	0	48	87
SI	8	6	4	33	51
<b>Total</b>	<b>110</b>	<b>63</b>	<b>28</b>	<b>163</b>	<b>364</b>

Q15H: Extend of Project Management methodologies used: CCPM Methodology	Not at all	To some extent	Greatly	I don't know / I am not familiar with these terms	Total
HR	20	14	4	31	69
EL	28	10	1	16	55
HU	21	7	2	21	51
IT	13	16	10	12	51
PT	24	12	1	50	87
SI	8	7	4	32	51
<b>Total</b>	<b>114</b>	<b>66</b>	<b>22</b>	<b>162</b>	<b>364</b>

Q15I: Extend of Project Management methodologies used: Kanban Methodology	Not at all	To some extent	Greatly	I don't know / I am not familiar with these terms	Total
HR	21	7	1	40	69
EL	25	7	2	21	55
HU	22	5	0	24	51
IT	16	12	6	17	51
PT	27	7	0	53	87
SI	9	5	2	35	51
<b>Total</b>	<b>120</b>	<b>43</b>	<b>11</b>	<b>190</b>	<b>364</b>



Q15J: Extend of Project Management methodologies used: Extreme Programming	Not at all	To some extent	Greatly	I don't know / I am not familiar with these terms	Total
HR	22	6	3	38	69
EL	29	13	0	13	55
HU	24	2	1	24	51
IT	16	12	4	19	51
PT	19	21	7	40	87
SI	13	5	0	33	51
<b>Total</b>	<b>123</b>	<b>59</b>	<b>15</b>	<b>167</b>	<b>364</b>

Q15K: Extend of Project Management methodologies used: Lean Methodology	Not at all	To some extent	Greatly	I don't know / I am not familiar with these terms	Total
HR	20	10	4	35	69
EL	24	16	4	11	55
HU	20	6	6	19	51
IT	14	13	12	12	51
PT	27	11	0	49	87
SI	9	13	6	23	51
<b>Total</b>	<b>114</b>	<b>69</b>	<b>32</b>	<b>149</b>	<b>364</b>

Q15L: Extend of Project Management methodologies used: Six Sigma	Not at all	To some extent	Greatly	I don't know / I am not familiar with these terms	Total
HR	21	9	2	37	69
EL	24	9	3	19	55
HU	22	4	1	24	51
IT	18	9	4	20	51
PT	27	7	0	53	87
SI	11	4	0	36	51
<b>Total</b>	<b>123</b>	<b>42</b>	<b>10</b>	<b>189</b>	<b>364</b>

Q15M: Extend of Project Management methodologies used: PRINCE2	Not at all	To some extent	Greatly	I don't know / I am not familiar with these terms	Total
HR	19	9	1	40	69
EL	27	9	2	17	55
HU	21	4	0	26	51
IT	21	6	4	20	51
PT	45	0	0	42	87
SI	11	4	0	36	51
<b>Total</b>	<b>144</b>	<b>32</b>	<b>7</b>	<b>181</b>	<b>364</b>

Q16: Project Manager as a competitive resource for tourism businesses	Strongly Agree	Agree	I don't know	Disagree	Strongly Disagree	Total
HR	21	29	16	3	0	69
EL	13	22	15	3	2	55
HU	9	17	11	6	8	51
IT	25	16	5	3	2	51
PT	24	42	21	0	0	87
SI	24	14	11	1	1	51
<b>Total</b>	<b>116</b>	<b>140</b>	<b>79</b>	<b>16</b>	<b>13</b>	<b>364</b>

Q17: Project Manager in organisational chart	Yes	No	I don't know	Total
HR	23	39	7	69
EL	16	31	8	55
HU	10	36	5	51
IT	23	24	4	51
PT	9	77	1	87
SI	28	18	5	51
<b>Total</b>	<b>109</b>	<b>225</b>	<b>30</b>	<b>364</b>

Q18: "My Project Management skills are satisfactory"	Strongly Agree	Agree	I don't know	Disagree	Strongly Disagree	Total
HR	9	29	22	8	1	69
EL	4	30	13	5	3	55
HU	2	10	21	13	5	51
IT	7	32	9	2	1	51
PT	6	45	29	6	1	87
SI	9	19	15	7	1	51
<b>Total</b>	<b>37</b>	<b>165</b>	<b>109</b>	<b>41</b>	<b>12</b>	<b>364</b>

Q19: Certification in Project Management	Yes	No	Total
HR	14	55	69
EL	3	52	55
HU	11	40	51
IT	8	43	51
PT	6	81	87
SI	8	43	51
<b>Total</b>	<b>50</b>	<b>314</b>	<b>364</b>

Q20: HyPro4ST course attendance	Yes	No	Total
HR	52	17	69
EL	45	10	55
HU	22	29	51
IT	36	15	51
PT	73	14	87
SI	43	8	51
<b>Total</b>	<b>271</b>	<b>93</b>	<b>364</b>

Q21: HyPro4ST course attendance: reason why	It is free of charge	I have spare time	I want to improve my existing knowledge	I want to learn something new	Other	Total
HR	1	0	35	16	0	52
EL	3	2	19	20	1	45
HU	0	2	17	3	0	22
IT	0	0	24	11	1	36
PT	6	0	47	20	0	73
SI	0	1	31	11	0	43
<b>Total</b>	<b>10</b>	<b>5</b>	<b>173</b>	<b>81</b>	<b>2</b>	<b>271</b>