

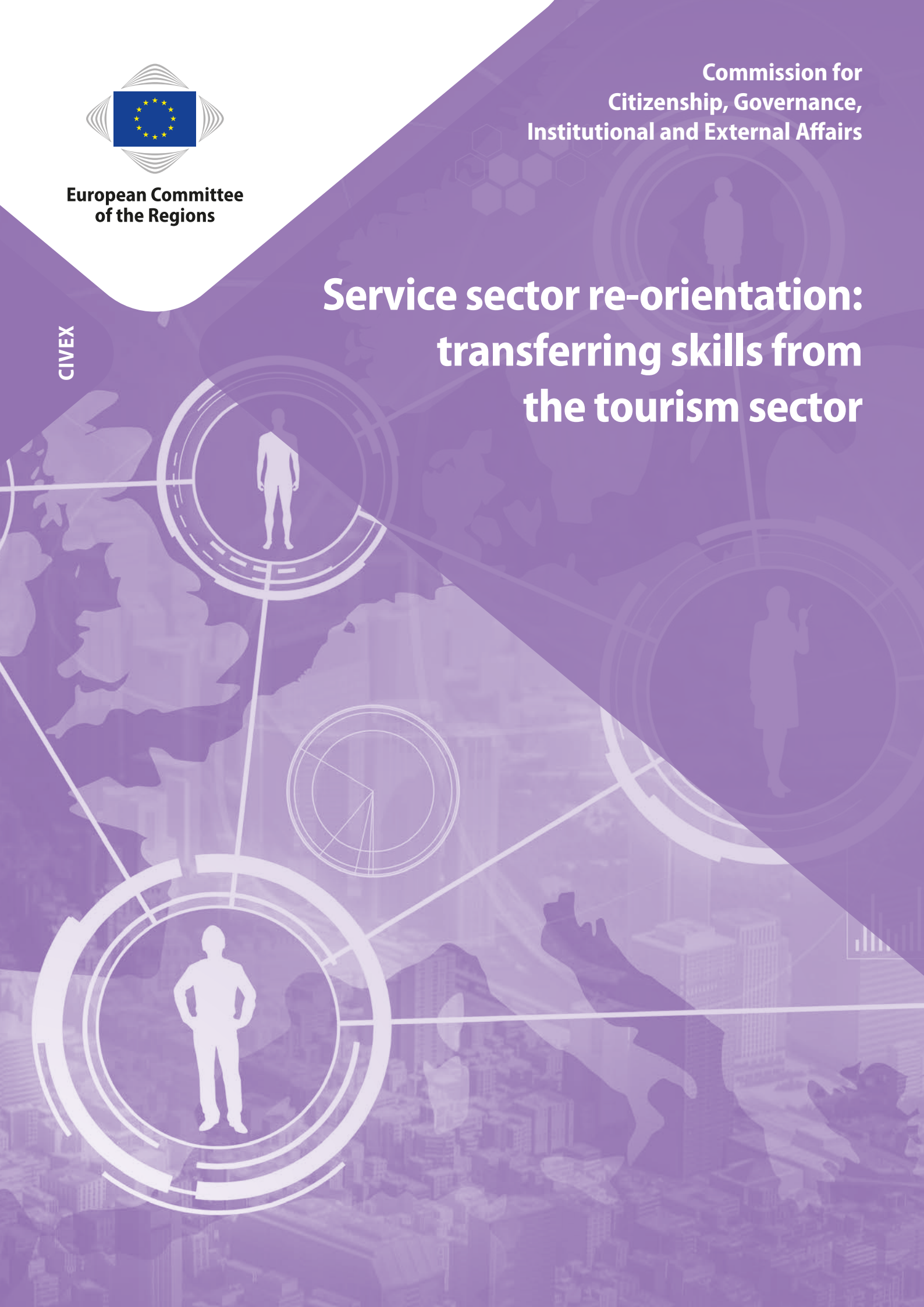


**European Committee  
of the Regions**

**Commission for  
Citizenship, Governance,  
Institutional and External Affairs**

**CIVEX**

# **Service sector re-orientation: transferring skills from the tourism sector**



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**It does not represent the official views of the  
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# Abbreviations

|                  |   |
|------------------|---|
| AFMT             | Agency for the Training of Tourism Professions (Tunis)                              |
| ANETI            | Agence Nationale pour l'Emploi et le Travail Indépendant                            |
| ANAPEC           | Agence Nationale pour l'Emploi et les Compétences                                   |
| AMFORHT          | World Association for Hospitality and Tourism<br>Education and Training             |
| ARLEM            | Euro-Mediterranean Regional and Local Assembly                                      |
| ASCAME           | Association of the Mediterranean Chambers of<br>Commerce and Industry               |
| CCL              | Local Government Code   |
| CRM              | Customer Relationship Management  |
| ETF              | European Training Foundation  |
| EHL              | Ecole Hôtelière de Lausanne   |
| ERP              | Enterprise Resource Planning  |
| EU               | European Union  |
| GDP              | Gross Domestic Product  |
| ICT              | Information and Communication Technologies  |
| ILO              | International Labour Organization   |
| ISITT            | Institut supérieur international de tourisme de Tanger                              |
| LRA <sub>s</sub> | Local and Regional Authorities  |
| MENA             | Middle East and North Africa  |
| OCR              | Optical Character Reader  |
| OFPPT            | Office de la formation professionnelle et de la<br>promotion du travail (Morocco)   |
| POS              | Point of Sale   |
| RTC              | Regional Tourism Council  |
| UK               | United Kingdom  |
| UM6P             | Mohammed VI Polytechnic University  |
| UNWTO            | United Nations World Tourism Organisation   |
| VALITS           | Validating Informal Transversal Skills for Disadvantaged and<br>Low-Skilled Persons |
| VET              | Vocational education and training   |
| WTTC             | World Travel and Tourism Council  |

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as well as interviewees who chose to remain anonymous for granting us their time and sharing their insights.

# 1 Introduction

## 1.1 Impact of the Covid-19 pandemic on the tourism sector globally, in Morocco, and in Tunisia

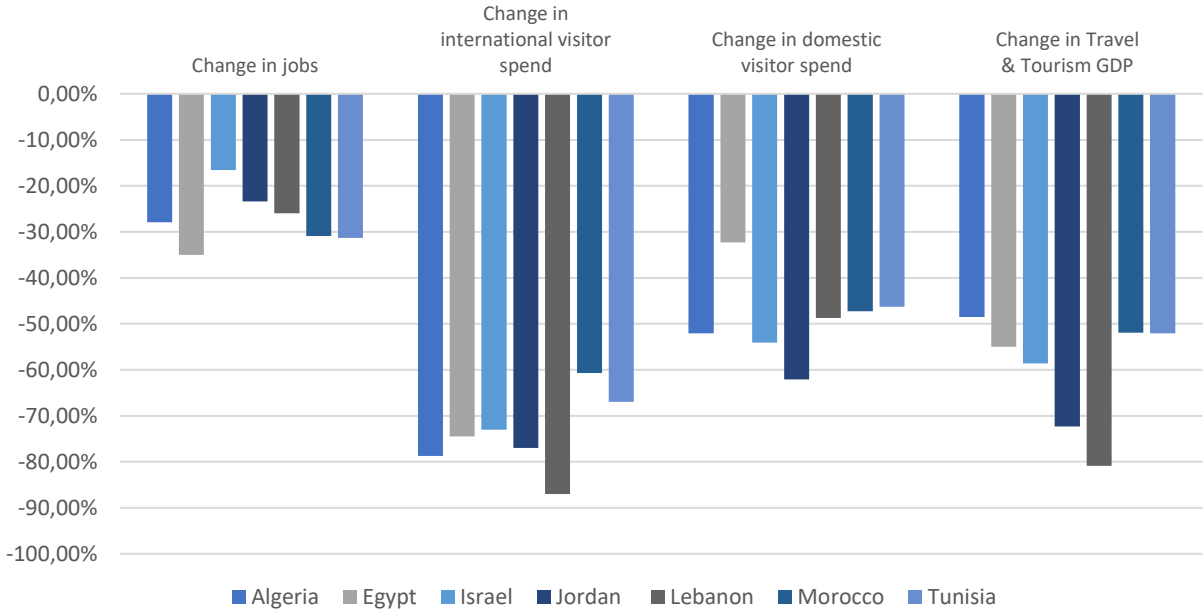
The tourism sector has recently entered onto the road to recovery following a devastating year whereby pandemic-related border closures and lockdown brought travel to a near halt. Indeed, while 2020 was “the worst year on record for the sector” and the first quarter of 2021 was still bad, with international arrivals dropping by 83% globally and by 78% in the MENA region compared to the same period the year before, experts believe that the prospects for the sector are slowly improving (UNWTO, 2021c). In the MENA region, two-thirds of experts interviewed by the United Nations World Tourism Organization (UNWTO) expected the rebound by the last quarter of 2021, with the remaining being more sceptical and pointing to 2022 (UNWTO, 2021c).

The economies of Morocco and Tunisia, two countries of particular interest to the present study, have for a long time heavily depended on the tourism sector. In the former, tourism contributed 12% to the country’s GDP and represented 12.4% of the total employment – when accounting for both direct and indirect jobs, over 2 million people were employed in the sector (WTTC, 2020; Moroccan Secretary of State for Tourism). As a result of the 92% decline in the number of foreign tourists that arrived in the country in 2020 compared to 2019 (Treasury and External Finance Directorate, Ministry of Economy, Finance and Administration Reform), the approximate number of jobs lost in the tourism sector exceeded 500,000 (DFTE, 2021).

In Tunisia, in turn, before the pandemic (in 2019), the travel and tourism sector contributed 13.9% to GDP and 10.8% of total employment (WTTC, 2020). In 2020, those numbers went down to 7.3% and 7.5%, respectively; travel and tourism GDP decreased by 52.1% (compared to 8.6% in the real economy) and 118,500 jobs in the sector were lost (WTTC, 2021). The exact number of persons employed in the sector is, however, difficult to estimate; while the World Travel and Tourism Council (WTTC) assesses pre-pandemic direct employment at 234,000 and overall employment at 478,500 jobs, according to the National Institute of Statistics of Tunisia only about 158,000 direct jobs in the sector existed in 2019.

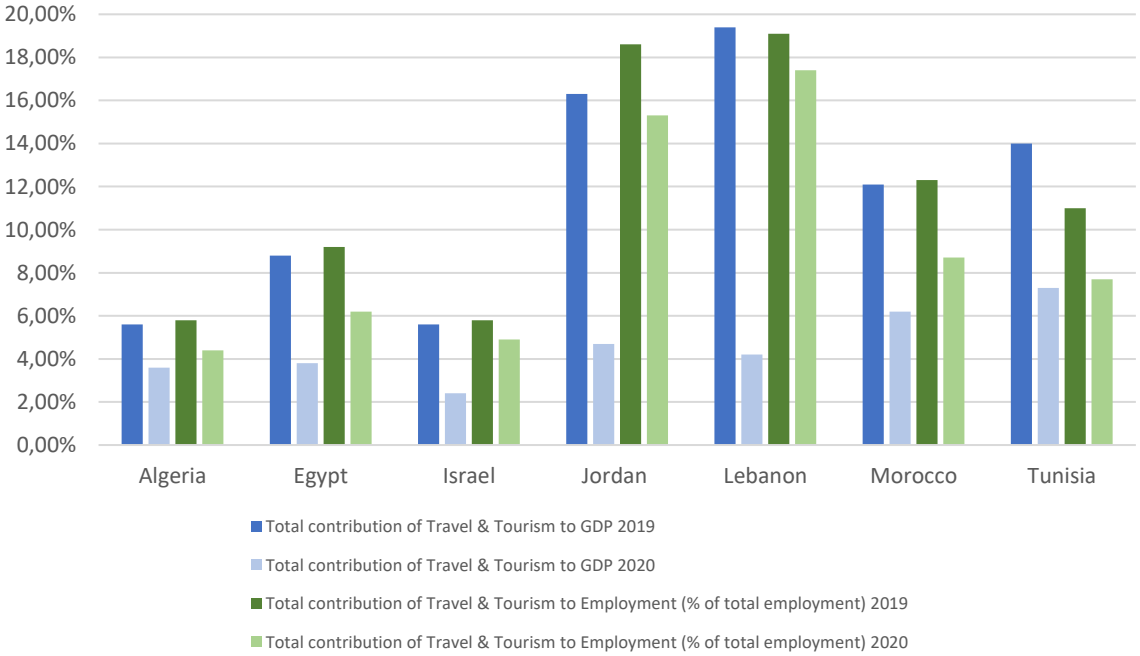


Figure 1 Changes in the travel & tourism sector 2020/2019 – selection of indicators for selected ARLEM Mediterranean partner countries



Source: WTTC (2021a).  
 \*No data for Palestine

Figure 2 Total contribution of travel & tourism to GDP and employment (% of total employment) in selected ARLEM Mediterranean partner countries in 2019/2020



Source: WTTC (2021a).  
 \*No data for Palestine

This disparity might be partially explained by the size of the informal economy, a problem prevalent not just in Tunisia but in other countries in the region as well. Indeed, a considerable share of those working in the tourism and hospitality sector are doing so informally (even as the issue of informality is most pronounced in agriculture) and, consequently, are more likely to lose their jobs than those operating in the formal economy. Overall, up to 58.8% and 79.9% of all workers in Tunisia and Morocco, respectively, are estimated to participate in the informal sector (ILO, 2018; ILO, 2020).

*Mitigation strategies in place globally*

The Covid-19 pandemic affected all the countries around the world, albeit to varying degrees and with different intensities over time. Almost everywhere, however, the travel and tourism sector was one of the hardest hit due to national lockdowns, border closures, and movement restrictions. In order to understand the scale of damage and take stock of the mitigation strategies put in place, the UNWTO surveyed stakeholders from 220 countries and territories and found that 100 developed policies specifically to secure employment and help maintain jobs (UNWTO, 2020). In the Middle East, 67% of countries adopted fiscal and monetary policy measures and 56% – jobs and training policies. However, none had implemented restarting tourism policies at the time when the report was being completed (compared to, e.g., one in three countries in Europe).

Globally, among the most prevalent measures implemented specifically to help the tourism sector were providing assistance to companies in the development of digital skills, as well as retraining and reskilling those employed or formerly employed in the sector. From among the countries of interest to the present report, such policies were undertaken in Egypt, Morocco, Tunisia, Albania, Bosnia and Herzegovina, Israel, Lebanon, and Monaco.

**Box 1 – Helping hospitality and tourism sector workers finding jobs in the care sector in the United Kingdom**

In April 2020, a re-skilling programme was launched in the UK. It offered hospitality and tourism workers the opportunity to gain the skills needed to secure employment in the care sector. The pilot programme was designed for 500 employees and received tremendous interest from hospitals. As a result, people in the hospitality and tourism industry who were made redundant due to the pandemic gained a new profession and the care sector gained new employees. The programme was developed as a collaboration between Skills for Health, People 1<sup>st</sup> International, and CareTech – organisations with an interest in skills development.

*Source: People1st, 2021.*

At the same time, to the best knowledge of the authors of the present report, official programmes specifically aimed at helping workers from the travel and tourism sector to pivot to other sectors have not been widespread, even as individual attempts on the part of non-governmental bodies have been identified (see Box 1 above). Such a situation might be due to a number of factors, mostly likely because of a widespread belief that the tourism sector will rebound relatively fast primarily due to widespread vaccination campaigns. Indeed, Morocco for instance has been vaccinating its population relatively fast (with nearly 16.7 million doses administered, approximately 22.9% of the population will have been vaccinated thus far [Covid-19 Tracker, 2021]) and has put in place an aggressive strategy to revive tourism in the country (Veille Info Tourisme, 2021).

Nevertheless, given some major trends in the global economy, most importantly the digital and green transitions, as well as evolving consumer preferences, the pandemic-induced crisis in the travel and tourism industry might be a good moment to rethink the future development strategy for the sector, which will necessarily have to adopt to the changing realities. As a result, certain jobs will undoubtedly be lost and new ones created – which renders the present exercise of rethinking the way in which existing skills in the travel and tourism sector can be repurposed for new positions both within and outside of the industry a particularly timely one.

## **1.2 Tourism in Morocco and Tunisia – the role of LRAs**

According to the interviewees, in both countries LRAs are seriously concerned about the impact of the pandemic on the functioning of the tourism sector in their constituencies. However, they recognised they had limited capacity to offer much assistance, which was mostly delivered by state-level authorities.

This is despite the fact that in both countries, decentralisation processes have been slowly progressing. Indeed, in Tunisia, the Constitution of 2014 provides for a complete decentralisation of the country and, consequently, a reorganisation of its administration. One of the main steps towards decentralisation was the adoption of the Local Government Code (CCL) in April 2018 and the municipal elections in May 2018. Through principles such as subsidiarity, local self-government, and decentralisation, the transfer of certain competences from central institutions to local entities and authorities is expected to be accelerated. However, implementation of the decentralisation reforms has been delayed by the pandemic.

Morocco does not have equally ambitious decentralisation goals, however each of the 12 different regions, boasting their own heritage and traditions, has its own Regional Tourism Council (RTC).

Indeed, the regions within both Morocco and Tunisia are increasingly cognizant of their own, local specificities and are keen on building regional development strategies capitalising on their local strengths (interviews). At the same time, they acknowledge that coordination between various administrative units is crucial to ensure cohesive and sound development of their respective countries.

In Morocco, the RTCs perceive the tourism sector as one with the potential to boost other economic sectors such as crafts, organic agriculture, energy-efficient industries, and green and sustainable transport/mobility. For instance, the skills of the (former) travel and tourism sector employees can be used in work with argan trees in Morocco and olive trees in Tunisia or heritage museums where local crafts are taught to tourists and locals alike (such as in Essaouira where workshops on thuja/cedar tree are organised). In Marrakech, on the other hand, the idea is to train small entrepreneurs capable of reviving gardens (contributing to greening of the city) where local people would meet tourists. Those plans are designed in line with the United Nations Sustainable Development Goals, with a particular focus on ecological and energy transformation, and in order to achieve them, LRAs are betting on rural areas (interviews). Moreover, as stressed by one of the interviewees, the new model of economic development envisioned in Morocco aims to link tourism sector development to plans for other sectors, such as agriculture, forestry and cultural and creative sectors (with a focus on preservation of tangible and intangible heritage).

The UNWTO as well as the G20 recognise travel and tourism as drivers for economic growth (UNWTO, 2012). Tourism is also an engine for innovation in transportation, building, catering, and now – digitalisation (UNWTO, 2021a). Along these lines, the UNWTO has opened an online space to showcase top start-ups from within the global tourism innovation and entrepreneurship ecosystem, following its mandate of promoting universally sustainable, accessible, and inclusive tourism, and innovation and digital transformation as a management priority. Several Mediterranean regions and territories were finalists of the UNWTO Innovation Competitions and Challenges, including Eco Nubia (Aswan, Egypt), Eco View Resort (Jerash, Jordan), Fly Foot (Beirut, Lebanon), Hotelmize (Tel Aviv, Israel), Pruvo (Haifa, Israel), SeeVoov (Omer, Israel), Tobadaa (Egypt), and Travaxy – accessible travel (Israel). Currently, the UNWTO Global Rural Tourism Startup Competition is underway as well, with the winner expected to be announced in October 2021 (UNWTO, 2021b).

LRAs in both countries currently see the digitalisation of both the public and private sectors as a top priority. Energy transition with an emphasis on sustainable mobility is also their concern; more broadly, they see the need to switch to sustainable energy and implement climate change policies, which are undoubtedly connected to improving the sustainability of the tourism sector as well. Indeed, some LRAs imagine the future of tourism education in terms of smart tourism, which according to the European Parliament is based on three pillars: connectivity, sustainability, and inclusion (of civil society in tourism projects). Smart tourism is mainly an urban destination issue, although in some European countries such as Spain, it is a priority for the rural territories as well, as defined by the Añora Declaration (Cordoba Province). In fact, the Declaration may serve as an inspiration to all ARLEM members, as it underlines that “digitisation and promotion of smart rural territories are key to the future of the economy, society and the environment” (Añora Declaration, 2018). It further stresses that digital transition and social innovation are key to development of sustainable and environmentally friendly agri-food sector as well as attracting more people to reside in the rural areas. In longer term, these processes are crucial for “generating wealth and quality employment” and supporting sustainable development of the rural areas (Añora Declaration, 2018).

Overall, in the short term, at the level of the public authorities there appears to be no perception of necessity to assist (former) employees from the tourist sector in re-orienting towards other sectors. In fact, some of the interviewees expressed the belief that those working in the tourism sector possess a broad spectrum of skills allowing them to easily move to other sectors – and not only are they aware of it but have been successfully working outside of the tourism sector before the pandemic as well (either seasonally or as their main place of employment following training in hospitality and tourism).

## 2 Identification of main transferable skills for successful reorientation: Morocco and Tunisia case studies

### 2.1 Main transferrable and transversal skills in the tourism sector

The most widespread definition of skills defines them as ‘the ability to apply knowledge and use know-how to complete tasks and solve problems’ (European Qualifications Framework).

**Soft skills** are usually associated with transversal skills indispensable for personal and professional development and include skills such as communication, person-to-person relationship, time management, leadership, and creativity. They are often referred to as social or emotional skills. While soft skills can be applied in every job and include qualities that enable a person to be successful in the workplace, **hard skills** are the qualifications required to perform job-specific tasks and responsibilities. They indicate objective expertise in a given field and can be learned through formal education and training, apprenticeships or internships, and certification programmes, as well as on the job.

**Transferable skills**, in turn, are those that can be utilised in a wide variety of jobs across different sectors and industries. Also, transferable skills and abilities can be used both socially and professionally. They are “portable”<sup>1</sup>.

---

<sup>1</sup> In recent years, the term “transversal skills” has been increasingly used instead of “transferable skills” (see, e.g., Cedefop (2008a). European Training Thesaurus. Luxembourg: Publications Office. This term is used more broadly and applied not only for skills but also for knowledge and competences. These skills are the basis for the development of the “hard” skills and competences required for success on the labour market and also for a person’s personal development. The terms transversal skills, core skills, basic skills, or key skills are used interchangeably. In the present report, however, we use to the term “transferable” skills as it aligns better with the goal of the study.

Figure 3 Transferability of soft skills in tourism sector



Source: Own analysis based on data from the O\*NET OnLine database and Ecole hôtelière de Lausanne

## 2.2 Soft skills in tourism

Soft skills are particularly important in the tourism and hospitality sector, where employees may need to deal with international clientele with different cultural and religious backgrounds and who use different languages on a daily basis. Apart from the skills necessary for direct interaction with clients, those that help with the management of teams whose goals are to satisfy customers are considered essential as well.

Soft skills enable employees to fit in at their workplace and include their attitude, flexibility, motivation, and manners. They are so indispensable in the tourism and hospitality sector that they are often the reason why employers decide to keep or promote an employee. Equally crucially, according to tourism schools' alumni associations, it is thanks to them that former students find employment in other sectors such as banking, insurance, supermarkets, hospitals, and clinics.

Paradoxically, however, hotel and tourism school and institute programmes in Morocco and Tunisia do not put too much emphasis on them. For instance, looking at the programmes of ISITT (International Tourism Superior Institute of Tangier) – considered for several decades as a possible regional training centre for Africa by the World Tourism Organization – soft skills could decidedly take a more substantial place (it is worth stressing at this point that Morocco was able to strengthen its partnership with the UNWTO in 2017 by virtue of signing of a new memorandum of understanding in particular thanks to improvements in the quality of training and the promotion of sustainability). For instance, few institutions include crisis and risk management in their programmes, which could undoubtedly prove useful during the Covid-19 pandemic.

Figure 3 above presents a list of crucial soft skills in the tourism sector that can be transferred to jobs in other sectors. The list was compiled based on data from the O\*NET OnLine database (developed under the sponsorship of the United States Department of Labor/Employment and Training Administration) and the Ecole hôtelière de Lausanne list of 10 essential soft skills for hospitality and tourism managers (see Annex 3 for details); the latter is treated as a gold standard by tourism and hotel schools in both Morocco and Tunisia. Knowledge of foreign languages is also considered as a priority among these soft skills.

Those most likely to be useful in jobs in other sectors (selected based on the number of occupations listed under each individual job in the O\*NET database and included in Figure 3) include time management, reading comprehension, and – importantly for the present report – active learning.



## 2.3 Hard skills in tourism

Hard skills typically focus on particular processes or tasks and involve the use of specific tools or software. For the hospitality sector, they are fairly easy to acquire. Moroccan and Tunisian hotel and tourism training establishments are teaching hard skills useful for individual subsectors: lodging, food and drink service, banquets and sales, event planning, local transportation, and maintenance of equipment and gardens.

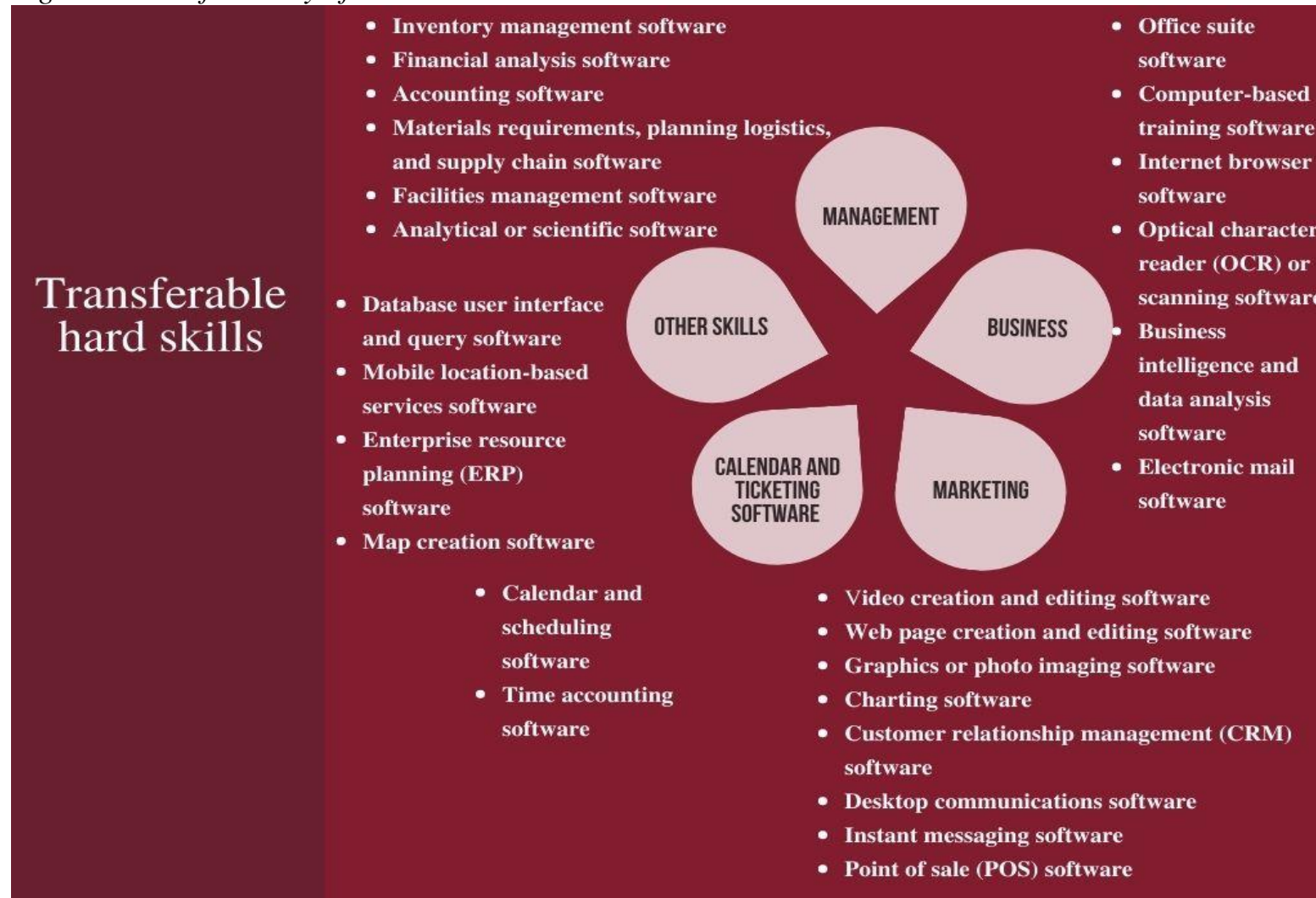
At the same time, certain skills are considered important sector wide. Most prominently, computer skills (such as word processing, Excel spreadsheets, bookkeeping, and automated billing systems) are considered increasingly important and are included, at least at a basic level, in all curricula. Relatively new skills that have been added to the list include, for instance, management of social media channels and online reservations of tourist and hospitality services, search engine optimisation, google analytics, email and marketing automation, and social media marketing.

At the managerial level, more advanced skills are naturally required, including business analysis, sales, consumer behaviour, project management, human resources and payroll programmes, financial operations and strategies, and office management. Analytics skills (such as data mining or database management) are considered important for international hotel chains and the main regional tourist offices, as are marketing skills.

Writing skills – how to write an email, present an intelligent proposal, and write up research results – which are not fully considered soft skills can be added to the list as well.

An analysis of 63 key skills required for the performance of 28 different jobs as listed on the O\*NET OnLine database performed by virtue of exploring in how many other jobs a given skills can be utilised, showed that materials requirements, planning logistics, and supply chain software – computerised bed control system software – could be used in 988 other occupations. Among the most transferable skills (included in Figure 4 below) is the ability to use office suite software (Word, Excel, PowerPoint), which is indeed a necessary skill for most computer-related occupations.

Figure 4 Transferability of hard skills in the tourism sector



Source: Own analysis based on data from the O\*NET OnLine databas

## 2.4 Existing opportunities in the service sector

With the acceleration of digital transition processes and more focus globally put on the transition to sustainable energy, certain sectors are bound to become in need of new employees. According to the France Strategy10, they include sales, e-commerce, and logistics on the one hand, and jobs related to energy transition such as making buildings more energy efficient, on the other (Aboubadra-Pauly et al., 2017).

Beyond the trends, however, numerous service sector jobs are potentially open to employees trained for the tourism and hospitality sector. Indeed, analysis of 28 occupations from the sector listed on the O\*NET OnLine data base, under the tourism and hospitality career cluster, proves just that (see Table 1 below).

*Table 1 Occupations in the tourism and hospitality sector with suggestions for redirection to other career paths*

| Tourism & hospitality sector occupation  | Possible transfer   |
|--|---|
| Customer Service Representative  | Customer Service Associate (for example, at a hospital)<br>Sales Associate (for example, at a grocery store)<br>Receptionist (for example, at a logistics company)<br>Bank Teller (for example, at a financial institution)<br>Driver (for example, at a delivery company)                                  |
| Hotel Managers, Reception, Marketing Managers, Accommodation Lodging Managers, Restaurant, Bar, or Cafe Managers | Sales Manager (for example, at an auto shop)<br>Shift Supervisor (for example, at a pharmacy)<br>Inventory Manager (for example, at a logistics company) General and Operations Managers<br>Administrative Services Managers<br>Transportation, Storage, and Distribution Managers<br>Food Service Managers |
| Hotel, Motel, and Resort Desk Clerks<br>Hotel Receptionists, Travel Reception Agents, Hotel Reception Cashiers   | Pharmacy Aides<br>Retail Salespersons<br>Bill and Account Collectors<br>Tellers<br>Court, Municipal, and Licence Clerks<br>Customer Service Representatives<br>Interviewers, Except Eligibility and Loan<br>Receptionists and Information Clerks  |

|  |   |
|--|---|
|  | <p>Hospital or Clinic Receptionist<br/>Cashiers (for example, at a grocery store)</p>   |
| <p>Baggage Porters and Bellhops</p>  | <p>Parking Enforcement Workers<br/>Security Guards<br/>Funeral Attendants<br/>Postal Service Clerks and Service Mail Carriers<br/>Shipping, Receiving, and Inventory Clerks<br/>Parking Attendants</p>  |
| <p>Recreation Workers</p>  | <p>Education and Childcare Administrators<br/>Preschool and Day-care<br/>Social and Human Service Assistants<br/>Directors, Religious Activities and Education<br/>Preschool Teachers, Except Special Education<br/>Career/Technical Education Teachers, Middle School<br/>Coaches and Scouts<br/>Recreational Therapists<br/>First-Line Supervisors of Personal Service Workers<br/>Residential Advisors</p> |
| <p>Maids and Housekeeping Cleaners</p>   | <p>Food Preparation Workers<br/>Food Servers, Non-restaurant<br/>Dining Room and Cafeteria Attendants and Bartender<br/>Dishwashers<br/>Locker Room, Coatroom, and Dressing Room Attendants<br/>Graders and Sorters, Agricultural Products<br/>Meat, Poultry, and Fish Cutters and Trimmers<br/>Laundry and Dry-Cleaning Workers<br/>Pressers, Textile, Garment, and Related Materials</p>                    |
| <p>First-Line Supervisors of Material-Moving Machine and Vehicle Operators</p> | <p>Cooks, Fast Food<br/>Fast Food and Counter Workers<br/>Waiters and Waitresses<br/>Food Servers, Non-restaurant<br/>Hosts and Hostesses, Restaurant and Coffee Shop<br/>Animal Caretakers<br/>Cashiers<br/>Counter and Rental Clerks<br/>Stockers and Order Fillers</p>   |

|   |  |
|---|--|
| Chefs and Head Cooks  | Industrial Production Managers<br>Food Service Managers<br>First-Line Supervisors of Food Preparation and Serving Workers<br>Cooks, Institution and Cafeteria  |
| Dining Room and Cafeteria Attendants and Bartender Helpers                  | Cooks, Fast Food<br>Food Preparation Workers<br>Fast Food and Counter Workers<br>Waiters and Waitresses<br>Food Servers, Non-restaurant<br>Meat, Poultry, and Fish Cutters and Trimmers<br>Home food delivery, possibly linked with supermarkets<br>Clerks (in supermarkets)   |
| Hosts and Hostesses, Restaurant, Lounge, and Coffee Shop                    | Cooks, Fast Food<br>Fast Food and Counter Workers<br>Food Servers, Non-restaurant<br>Cashiers<br>Stockers and Order Fillers  |
| Tour Guide  | Sales Associate<br>Caregiver<br>Receptionist (for example, at a hospital)<br>Bank Teller (for example, at a financial institution)<br>Delivery Driver (for example, using a delivery app)<br>Security Guard (for example, at an essential retail store)<br>Stocker (for example, at a grocery store)<br>Warehouse Associate (for example, at an e-commerce company)<br>Shopper (for example, for a delivery app) |
| Travel Agent, Travel Consultant, Travel Manager, Ticketing & Booking Agents | Sales manager (for example, at an auto shop)<br>Shift supervisor (for example, at a pharmacy)<br>Inventory manager (for example, at a logistics company)   |
| Purchasing Managers/Assistants  | Purchasing managers/assistants in big supermarkets   |

*Source: Own compilation based on data from the O\*NET OnLine database.*

On the one hand, occupations that are related to experience, advanced knowledge, and specialised skills are related to managing other people, multi-tasking, and organisational skills, such as hotel manager. To get such a job, long education and extensive experience are required. At the same time, this is an occupation with a high transferability potential into other service sectors, not least because a person in such a position must have already exhibited the ability to learn and retrain. Redirection to another sector for a position that requires transferable skills and knowledge can therefore be relatively smooth, but also challenging at the same time –it might not always be easy to find for such a person a position on a similar level (and so equally socially respectable) and with similar remuneration. Importantly, as the digitalisation of the tourism and other sectors progresses, digital skills used in occupations such as hotel managers, travel agents, or purchasing assistants are increasingly valuable on the labour market.

On the other hand, there are occupations for which less training and education are needed, such as hosts and hostesses. The short learning time needed to perform these jobs means that such a person can more easily and willingly take the time to train for a new occupation. At the same time, however, the skills already acquired for such a job can be transferred to fewer new potential occupations.

Looking at the sectors, those that exhibit the most potential for absorbing former tourism and hospitality sector employees, per the analysis exhibited in the table include, most prominently, trade and transportation. In the former, possible occupations include sales representatives, clerks, cashiers, counter and rental clerks, sales managers, and retail salespersons. In the latter – food delivery, postal service, and drivers, among others. Some niche jobs such as funeral attendants can be taken into consideration as well.

The abundance of opportunities in the trade sector is positive news, as despite the e-commerce boom amid the pandemic, multiple stores, especially those offering first-need goods such as groceries, had to operate longer hours and were recruiting additional staff.

Additionally, and more specifically in the case of Morocco and Tunisia, the interviews suggested that those trained for the tourism sector could find employment in the services required for the functioning of the fisheries sector (transformation and administration) and the agricultural sector (for instance, around argan trees in Morocco or olive trees in Tunisia), especially in the face of the sustainability-related reforms underway in both countries.

Culture is also a sector where skills acquired in the tourism sector can be utilised. This means not only the development of events and festivals, but also the preservation of the intangible heritage, traditions, and folklore of the communities: their music, dances, poetry, and mythical or legendary stories – of importance not just for tourism but also for the maintenance of local and national identities.

## **2.5 Training sector in Morocco**

In Morocco, the first training institution was established in 1950: “The Hotel School of Rabat”. Since then, 15 institutions were established in the country, including the ISITT, a UNWTO affiliate (Ministère du Tourisme, de l’Artisanat, du Transport Aérien et de l’Economie Sociale, 2020). All training institutions collaborate closely with local and regional tourism offices and public bodies such as ANAPEC, the Moroccan agency to promote employment, whose current goals include tackling the issue of the mismatch between the skills offered at educational institutions and those sought by employers (AMSPE, 2020). As stressed by the interviewees, one group of such skills particularly needed in modern day employment is digital skills. It was suggested that one of the reasons for the current state of things is a lack of adequate equipment (such as laptops and tablets) in training institutions.

However, even before the outbreak of the pandemic, significant changes were planned in the vocational training system in the country. The changes, although delayed because of Covid-19, are still planned to be implemented. Most importantly, 12 training schools are to be transferred to the National Education Minister and become vocational technical high schools. The first programmes adapted to the needs of the job market at the national level were developed in 2021 by the OFPPT (Office de la formation professionnelle et de la promotion du travail) and the Mohammed VI Polytechnic University (UM6P) as a mode of supporting the development of Cities of Professions and Skills (Cités des Métiers et des Compétences), which are to be created by 2022. Among the trainings offered in, among others, in the region of Souse Massa and the city of Benguéir, are industry 4.0, health, tourism, and renewable energy. Other changes include the closure of selected training institutions and the transformation of others. For instance, the International Higher Institute of Tourism in Tangier (ISITT) will expand its training and become a major training centre for all service sectors, with a goal of making it an international training hub for Africa with the support of UNWTO.

## 2.6 Training sector in Tunisia

The Tunisian government set up the first Hotel School in Bizerte in 1960. By 2020, the Tunisian National Tourism Office had a higher tourism institute, three training centres, and four hotel schools spread over six governorates: the Centre de formation touristique of Nabeul, the Hotel School of Sousse Nord, the Centre de Formation touristique of Djerba, the Hotel School of Tozer, the Hotel School of Monastir, the Hotel School of Aïn Draham, the Institut Superior Professional de Tourisme of El Kantaoui, and the Centre de Formation Hôtelière et Touristique of Hammamet. A number of private training companies, such as FormHotel or the Collège LaSalle and the Institut Magrèbin de Management et du Tourisme, exist in all major cities and regions in the country as well.

Before the outbreak of the Covid-19 pandemic, a series of reforms in the training sector took place in Tunisia with a goal of improving quality of training by virtue of: i) removing the mismatch between the skills acquired during trainings and those needed by the employers (taking into consideration differences between individual regions, e.g., those on the coast versus those in the desert); ii) strengthening monitoring and evaluation practices; iii) developing the skills of trainers; and iv) introducing a training and learning information and guidance system to increase demand in training. The changes were consulted with stakeholders in the hospitality and tourism sector to better address their needs.

As noted by the agency in charge of tourism professions (AFMT – Agency for the Training of Tourism Professions), one of the key deficiencies of the Tunisian training sector – outside of insufficient pedagogical and technical training for trainers and the lack of field experience of most teaching staff – is the lack of monitoring markets and trends and planning for the future: gathering data and analysing the changing trends in order to be able to anticipate future challenges and facilitate decision making. Therefore, together with the Tunisian government, the AFMT has launched a series of further reforms to its training system with several objectives :

- switching from the Sea-Sand-Sun to other tourist products and services such as medical tourism, thalassotherapy, cruises, and guesthouses, among others;
- certifying training programmes, continuing education, retraining, and exchange of experience;
- speeding up the digitalisation process;
- highlighting the importance of human resources and developing cross-cutting skills;



- putting training and learning at the service of regional and local development.

The idea also is to address common transferable skills in order to accelerate transfers and reduce training costs through multi-site formulas and Microsoft-type certifications to accelerate digitalisation skills.

### **3 Conclusions**

Although the number of tourists resuming travel seems to be on the rise globally and in some of the countries of relevance to this study it is slowly increasing again, it is difficult to predict when – or indeed if – it shall rebound to pre-pandemic levels. This will depend not only on the pace of vaccination programmes both in origin and destination countries, but also the protective measures and incentives put in place by governments in the ARLEM Mediterranean partner countries.

At the same time, despite this uncertain outlook for the tourism sector as well difficulties in providing training related to the necessity to move trainings online amid the pandemic-induced lockdowns, it appears that prospective candidates have not been discouraged from pursuing education suited for work in the tourism sector. Indeed, in Morocco for instance, the number of students who registered for courses at ISITT increased by over 10% for the academic year 2020-2021 compared to the year before.

As it seems, initiatives aimed at helping (former) tourism sector employees into other sectors should also contain a component of within-the-sector transfers and harnessing opportunities related to the development of new trends in the tourism sector such as virtual tourism, ecotourism, and sustainable tourism.



## 4 Recommendations<sup>2</sup>

The primary strength of LRAs is that they possess an in-depth knowledge of the situation on the ground when it comes to the needs and challenges of the labour market. For instance, **while talking about transferring skills and reorienting (former) hospitality and tourism sector workers towards other service sectors, it must be noted that in Morocco and Tunisia this strategy has already been applied by the alumni of tourism schools.** Indeed, approximately 40% of the alumni of ISITT for years were searching for jobs outside of the hospitality and tourism sector upon graduation, mostly due to low salaries in the sector, in particular for entry-level jobs, and because the skills needed on the market differed from those provided during the course of the training (interview). A similar situation occurred in Tunisia where an estimated 40-45% of tourism schools graduates eventually found jobs outside of the sector.

- ➔ In order to better understand how (former) tourism sector employees can be assisted in pivoting to other sectors, it would be worth conducting research into strategies that have already worked for the above-mentioned alumni groups.
- ➔ Similarly, as the tourism sector operates on seasonal basis, it is worth gathering the experiences of employees that have been moving in between different sectors depending on the time of year long before the outbreak of the pandemic.
- ➔ The Cités des Métiers et des Compétences that are under development in Morocco can indeed be of great help in providing vocational trainings tailored for the needs of each of Morocco's 12 regions; LRAs should actively support the development of their programmes.

While designing policies, it must be kept in mind that in different ARLEM Mediterranean partner countries, the services sectors have different capacities to absorb additional jobs but also different plans and strategies pertaining to economic diversification and “*servicification*” processes. For instance, in Israel (2017), more advanced ICT service exports account for 45.6% of all services exports (balance of payments) in Palestine – 14.1%, but in Morocco and Tunisia only 8.6% and 9.2%, respectively (World Bank, 2020). With strategies like “Morocco Digital 2020”, however, countries aim to actively shape and develop their digital futures, a fact that should be taken into consideration while

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<sup>2</sup> Recommendations presented in this section are applicable to the following ARLEM Mediterranean partner countries: Egypt, Turkey, Algeria, Morocco, Syria (membership currently suspended), Tunisia, Albania, Bosnia and Herzegovina, Israel, Jordan, Lebanon, Mauritania, Palestine, Monaco, Montenegro, and Libya, which participates as observer.

developing training schemes in the tourism sector but also more broadly while defining educational and training policies in each individual country.

**Most crucially, the acceleration of digitalisation processes is indispensable for creating a conducive context for skills transfers and broadening the service sector.** Luckily, the silver lining of the ongoing Covid-19 pandemic is that both national and sub-national authorities truly realised the necessity to digitalise and moved this issue up towards the top of their agendas.

**Providing training online with the use of digital tools** is a cheaper and more efficient way of reaching a larger number of persons interested in acquiring new knowledge and skills, cutting the costs of travel, accommodation, and catering outside of the place of residence of the trainees. Online classes should be supplemented by in person training and apprenticeships to allow trainees to obtain hands-on experience. The example of the intense 12-week online training that helped former hospitality and tourism sector workers reorient towards the care sector, which was organised in the UK by Skills for Health, People 1<sup>st</sup> International, and CareTech (see Box 1 for details), showed that such programmes are possible to organise, even under conditions of a lockdown.

The trainings could be provided by the already existing training institutions in the countries of interest to the report and tailored to the needs of a given region in collaboration with LRAs.

- ➔ In order to organise such programmes, it will be necessary to train the trainers.
- ➔ Some trainees will have to be taught first how to use the digital platforms through which the trainings would be delivered; others may require assistance securing access to fast and reliable internet as well as laptops or tablets (which could be rented for a symbolic sum for the duration of the training). LRAs can help to identify those most in need of assistance and work with national authorities, the private sector (e.g., via corporate sponsorships), and international donors to secure sufficient funding for this type of assistance.

Trainings should not only be delivered with the use of digital tools but also should **focus on teaching digital skills**. As it has been shown in Figures 3 and 4 above, multiple hard skills useful in the various professions within the hospitality and tourism sector are transferable to other service jobs as well.

With improved digital infrastructure and more conducive legislation, **which must be delivered by national-level governments** (for recommendations on how to support digitalisation processes in the region see, e.g., the report prepared for the CoR by Sidło et al., 2020), as well as the appropriate digital skills, **the service sector can be broadened and trade in online services can be boosted**, which can lead to the creation of more high value-added jobs. Indeed, to facilitate these processes, all LRAs should have operational and regularly updated websites and their own employees should be trained in digital skills as well.

**Searching for new jobs can also be made easier with the use of online tools as well.** LRAs could partner with the private sector to create online platforms listing the jobs available in the region and helping jobseekers to understand which jobs they could pivot to depending on their previous experience and skills. An interesting example of how this could be done was developed under an Erasmus+ VALITS (Validating Informal Transversal Skills for Disadvantaged and Low-Skilled Persons)<sup>3</sup> project, which aimed at helping jobseekers to identify their skills – crucially soft skills which are difficult to quantify – and understand how they could be best used on the labour market.

- ➔ For best results, a **pan-regional approach** towards skills transfers should be undertaken, for example under the umbrella of the Union for the Mediterranean, in cooperation with, e.g., the Association of the Mediterranean Chambers of Commerce and Industry (ASCAME) or the European Training Foundation (ETF), a European Union (EU) agency supporting the countries of the EU neighbourhood to reform their education, training, and labour market systems.
- ➔ Drawing from the experiences of other countries and regions is invaluable as well. As showcased by the UNWTO report (2020), in cooperation with International Labour Organization (ILO) most of the 220 countries surveyed did employ some kind of mitigation measures directed at the hospitality and tourism sector – although it appears that few if any focused their attention on transferring workers outside of the sector. Surveying strategies, especially those with similar socio-economic characteristics, could be inspirational; the exchange of experiences (both good practices and lessons learnt) within the Mediterranean basin could prove particularly useful.

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<sup>3</sup> Valits 2.0, 2021.

More broadly, **more focus should be placed on helping people to acquire soft skills**, which are highly transferrable and can be applied in all kinds of jobs. As underlined by some of the interviewees, not enough attention has been given to soft skills during trainings in the hospitality and tourism sector thus far. As it can be seen from the analysis in Section 2.6 communication, organisational, and customer service skills are indeed ones that can be easily used in all careers both in the service sector and beyond.

Finally, for all the Mediterranean countries, **in order to secure economic recovery and resilience, it is important to think long-term in terms of the green transition in the energy and blue economy sectors**. Both have great potential for the generation of numerous jobs – both more technical and services-oriented ones. In the EU, for instance, initiatives are already ongoing towards harnessing the potential the green and blue economies for sustainable growth and jobs (European Commission, 2021).

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# Annex 1. Examples of training curricula in the tourism sector

Table A1. Operational Management of the Hotel and Restaurant Industry Curricula, Normal Cycle

| SPECIFIC GOALS  | HARD SKILLS TAUGHT IN THE FOLLOWING MODULES   | SOFT SKILLS TAUGHT IN THE FOLLOWING MODULES DIRECTLY OR INDIRECTLY   |
|---|---|--|
| <ul style="list-style-type: none"> <li>➤ mastering the rules specific to the occupation in terms of technical gestures, behaviour, legislation, and regulations regarding hygiene and risk</li> <li>➤ acquire the cross-cutting skills essential to the profession such as communication, the practice of several foreign languages, professional culture, and the tourism economy</li> <li>➤ encourage managerial creativity to be a force of proposal at the enterprise level</li> <li>➤ promote professional integration through internships and corporate assignments</li> <li>➤ learn about strategic management tools and techniques</li> </ul> | <ul style="list-style-type: none"> <li>➤ culinary arts practices</li> <li>➤ table arts practices</li> <li>➤ professional technologies</li> <li>➤ accommodation: back and front office, room service</li> <li>➤ culinary and pastry technology, tableware and service</li> <li>➤ food hygiene and safety</li> <li>➤ professional and managerial assignment</li> <li>➤ restoration project management</li> <li>➤ customer environment: marketing services</li> <li>➤ nutrition and menu design</li> <li>➤ engineer in human resources</li> <li>➤ techniques - applied management tools</li> <li>➤ personal development and professional projects</li> <li>➤ introduction to corporate strategy</li> <li>➤ responsible management</li> <li>➤ quality management</li> <li>➤ IT management</li> <li>➤ setting up entrepreneurial project-methodology and project management</li> </ul> | <ul style="list-style-type: none"> <li>➤ sensory analysis</li> <li>➤ applied languages</li> <li>➤ team management and leadership</li> <li>➤ diversity management</li> <li>➤ sensorial marketing, tutoring project management</li> <li>➤ human resources management</li> <li>➤ teams and human relations</li> <li>➤ customer relations</li> <li>➤ communication and professional culture</li> <li>➤ intercultural communication</li> <li>➤ autonomous project redaction and viva</li> </ul> |

Source: ISITT, 2021.

*Table A1. Tourism Management Curricula, Normal Cycle*

| <b>SPECIFIC GOALS</b>   | <b>HARD SKILLS TAUGHT IN THE FOLLOWING MODULES</b>  | <b>SOFT SKILLS TAUGHT IN THE FOLLOWING MODULES DIRECTLY OR INDIRECTLY</b>   |
|---|---|---|
| <ul style="list-style-type: none"> <li>➤ train operational managers capable of designing, organising, running and marketing tourism services</li> <br/> <li>➤ professions:               <ul style="list-style-type: none"> <li>• head of travel agency</li> <li>• project manager</li> <li>• product manager</li> <li>• booking manager</li> <li>• market manager</li> <li>• commercial service manager</li> <li>• assistant manager of a tourist holiday village</li> <li>• communication and animation manager</li> <li>• trainer, training manager</li> </ul> </li> </ul> | <ul style="list-style-type: none"> <li>➤ economic and social management</li> <li>➤ introduction to management</li> <li>➤ operational management</li> <li>➤ heritage and culture</li> <li>➤ art and heritage</li> <li>➤ travel agency techniques</li> <li>➤ guidance and accompaniment techniques</li> <li>➤ meeting, incentive, congress, events (mice)</li> <li>➤ first aid</li> <li>➤ economic and social management</li> <li>➤ ICT and communication</li> <li>➤ presentation software and applications</li> <li>➤ design and assembly of tourism products</li> <li>➤ itinerary and travel organisation</li> <li>➤ sales techniques</li> <li>➤ socio-economic and legal environment of the tourism company</li> <li>➤ tourism geography</li> <li>➤ administrative management of staff</li> <li>➤ customer environment</li> <li>➤ marketing of services</li> <li>➤ distribution and pricing</li> <li>➤ promotion and marketing</li> <li>➤ design and creation of multimedia support</li> <li>➤ research methodology</li> <li>➤ organisation of events and tours</li> <li>➤ management of tourism organisations</li> <li>➤ quality management</li> <li>➤ marketing of tourist destinations</li> </ul> | <ul style="list-style-type: none"> <li>➤ professional communication</li> <li>➤ intercultural communication</li> <li>➤ anthropological approach to Morocco</li> <li>➤ customer approach</li> <li>➤ professional and managerial mission</li> <li>➤ personal development and career objectives</li> <li>➤ study of customer behaviour</li> <li>➤ communication techniques and interpersonal relationships</li> <li>➤ professional and managerial assignment</li> <li>➤ research paper – methodology, tutoring, and dissertation viva</li> <li>➤ communication and hospitality techniques</li> <li>➤ public speaking</li> <li>➤ entrepreneurial project set-up, methodology and project management</li> <li>➤ tutoring and business planning</li> <li>➤ autonomous redaction of the project and viva</li> </ul> |

|  |   |  |
|--|---|--|
|  | <ul style="list-style-type: none"> <li>➤ human resources management</li> <li>➤ techniques and management tools applied to tourism organisations</li> <li>➤ sustainable development management</li> <li>➤ tourism and environment</li> <li>➤ international economic environment</li> <li>➤ international tourism</li> <li>➤ tourist planning</li> <li>➤ ICT applied to tourism organisations</li> <li>➤ website creation</li> <li>➤ management of information technologies</li> <li>➤ budget/finance management</li> </ul> |  |
|--|---|--|

*Source: ISITT, 2021.*



## Annex 2. Examples of jobs' descriptions

Table A2 Examples of jobs and skills defined by the National Tourism Administration in Tunisia

| JOB                                    | HARD SKILLS   | SOFT SKILLS  |
|--|---|--|
| <b>Travel agents for ticketing</b>     | <ul style="list-style-type: none"> <li>➤ in-depth knowledge of travel booking, hotel rooms, and tourist stays</li> <li>➤ mastery of the use of computer tools and specific software</li> </ul>  | <ul style="list-style-type: none"> <li>➤ two foreign languages</li> <li>➤ advising clients</li> <li>➤ recruit, train, and mentor staff (ticketing agent)</li> <li>➤ how to lead a team</li> <li>➤ good speech, and good business skills (salespeople)</li> <li>➤ ensure customer satisfaction</li> </ul>   |
| <b>Hotel entertainers</b>              | <ul style="list-style-type: none"> <li>➤ setting the schedule of the day and evening activities and displaying it</li> <li>➤ running the programme with their employees and possibly the hotel's clientele</li> <li>➤ organisation and animation group games</li> <li>➤ presentation and animation of shows</li> <li>➤ organisation and supervision of games, tournaments, parties</li> </ul> | <ul style="list-style-type: none"> <li>➤ keeping customers safe</li> <li>➤ knowledge of first aid concepts</li> <li>➤ knowledge of the traditions and customs of local and foreign customers</li> <li>➤ at least two foreign languages.</li> <li>➤ to create a continuous party atmosphere</li> <li>➤ know how to arouse the interest of clients and involve them in activities</li> </ul> |
| <b>Reservation managers</b>            | <ul style="list-style-type: none"> <li>➤ knowledge of all types of rooms</li> <li>➤ knowledge of the hotel's various services</li> <li>➤ knowledge of events taking place at the hotel and outside</li> <li>➤ mastery of the right computer tool and software</li> <li>➤</li> </ul>   | <ul style="list-style-type: none"> <li>➤ be friendly, direct, and courteous</li> <li>➤ great attention in bookings.</li> <li>➤ writing skills</li> </ul>   |
| <b>Purchasing and storage managers</b> | <ul style="list-style-type: none"> <li>➤ excellent knowledge of products stored and in transit on behalf of the hotel, their rotation, and their mode of storage</li> <li>➤ mastery of IT and inventory management software</li> </ul>  | <ul style="list-style-type: none"> <li>➤ to be able to lead and control his/her team. Pay close attention to the quality of the goods received</li> <li>➤ to be determined, conscientious, and honourable</li> <li>➤ ability to cope with unforeseen situations</li> </ul>   |
| <b>Baggage handler</b>                 | <ul style="list-style-type: none"> <li>➤ knowledge of the hotel's facilities</li> </ul>   | <ul style="list-style-type: none"> <li>➤ knowledge of at least one foreign language</li> </ul>   |



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|  | <ul style="list-style-type: none"> <li>➤ knowledge of how the appliances installed in the rooms work</li> <li>➤ knowledge of the events taking place in the hotel and in the city</li> <li>➤ knowledge of safety guidelines</li> </ul> | <ul style="list-style-type: none"> <li>➤ be alert to any anomaly that should be reported to the concierge</li> <li>➤ show discretion and courtesy</li> <li>➤ adapt to unforeseen situations</li> </ul> |
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*Source: Ministry of Tourism, 2021.*

## Annex 3. The EHL (Ecole Hôtelière de Lausanne) Analysis On Soft Skills

- Customer service skills: *“Excellent customer service skills is all about understanding the customer’s needs and being able to deliver a positive customer service experience”.*
- Networking skills: *“Learning to use language that employers like to hear, such as ‘client relationship management’ and ‘guest relations’ during job interviews, can enhance one’s chances of being hired”.*
- Communication skills: *“In the hospitality and tourism business, each day can involve contacts with people of a variety of backgrounds, ages, nationalities and temperaments. Thus, it is important to be able to communicate in a way that represents the business while at the same time speaking to customers in a way that they can understand and relate to”.*
- Flexibility skills: *“Compared to other professions, hospitality and tourism jobs often demand that employees work odd hours like nights and weekends. It is also necessary to be able switch rapidly from one task to another as the situation may arise”.*
- Organizational skills: *“Given the need to multi-task and respond to spur-of-the-moment requests, it is necessary to maintain an organizational structure so as to be able to accomplish daily tasks in an efficient manner”.*
- Language skills: *“Speaking clients’ language enables one to establish a more intimate relationship with them which promotes customer satisfaction and loyalty”.*
- Commitment: This *“job is to keep clients happy no matter the cost, such individuals will never progress beyond entry-level jobs”.*
- Can-do attitude: *“It is essential that hospitality professionals be prepared to accept challenges in the workplace no matter how difficult the task may appear”.*
- Multi-tasking skills: *“Being able to fulfil multiple roles in a hospitality or tourism enterprise is a way for employees to render themselves indispensable to their employers. It is important to be able to juggle different tasks simultaneously, while completing each task assigned”.*

- Cultural awareness: *“Hospitality and tourism enterprises are more likely than most to deal with customers of a variety of nationalities and cultural backgrounds... Cultural awareness is an essential social skill that will help customers feel comfortable and at home with their surroundings. The goal is satisfying their needs and wants, so as to turn them into repeat customers”.*

Source: <https://hospitalityinsights.ehl.edu/top-10-soft-skills-hospitality-tourism>

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