

# NTG ALLIANCE

## COUNTRY INTERVIEW REPORT

### BULGARIA

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EXTRA



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**Background:** A general overview of the Next Tourism Generation Alliance project, and the number of interview participants per subsector in this country report.

The **Next Tourism Generation Alliance (NTG)** is the first European partnership for improving a collaborative and productive relationship between education and industry, funded by European Union. The NTG Alliance has partners from 8 countries (Spain, UK, Hungary, Netherlands, Italy, Bulgaria, Germany, Ireland), and will provide employees, employers, entrepreneurs, teachers, trainers and students with a set of Core NTG modules in digital, green and social skills.

Goals of the NTG Alliance are:

- To establish a Blueprint Strategy for Sectoral Skills Development in Tourism to respond to the fast changing and increasing skills gaps in digital, green and social skills sets;
- To define a scalable mechanism and model for sustainable and digital curricula between the industry and education providers at regional, national and European level;
- To create transformative cooperation in five key tourism sub-sectors: hospitality, food and beverage operations, travel agencies and tour operators, visitor attractions and destination management;
- To develop, deliver and test Next Tourism Generation (NTG) Skills Products for professionals, trainers, students, university tourism departments, local authorities, companies to respond to the fast changing and increasing skills gaps in digital, green and social skills sets.

Should you wish to know more about the Next Tourism Generation Alliance project, please visit [www.nexttourismgeneration.eu](http://www.nexttourismgeneration.eu)

For getting involved in the project (as a community member, affiliate partner or associate partner), please visit [nexttourismgeneration.eu/contact/](http://nexttourismgeneration.eu/contact/)

### Sample

Number of respondents interviewed for this report: 16

- Tour operators / travel agencies: 3
- Training and consultancy companies: 6
- Accommodation: 5
- Food & beverage: 2

**Theme 1: NTG Skills Sets:** A summary of respondents' ideas of *current skills needs* (green, social, digital), *current shortage of skills*, *current training provision*.

**Tour operators / travel agents - current skills needs, skills shortages, current (access to) training provision in relation to skills sets:**

**Digital Skills.** The respondents note that the nature of work in this business requires skills for working with Internet and Microsoft office, and overall technical literacy is what TO/TAs representatives are looking for and considering as important. In addition and specific to this particular sector is given the work with Global Distribution Systems - UFTAA / IATA.

Although, respondents note that the share of online sales has grown in recent years and quite often a customer and an employee never really meet - selling, documenting, receiving, and making payments are done online, the only skill mentioned is high proficiency in digital marketing. The content of the answers provided by the interviewees, however does not give a clear answer of which particular skills of the digital marketing they have in mind. It is interesting that the stakeholders do understand the specifics of their sector and the current market situation, such as the importance of advertising, social media, limited budgets, etc. But they have no clear strategy what is needed as digital skills in order to properly manage their companies in the current market. This is also supported by the lack of identified shortages by all respondents and the following statement by one of the respondents: "Unfortunately, tourism companies in Bulgaria rarely invest funds to improve the digital skills of their employees, mainly for financial reasons."

In terms of training, only one company shares that they did only one seminar in digital marketing, and it was provided by an external company. Agreed by all, this is due to high costs and high employee turnover. Nevertheless, the interviewees share the same ideas and experience in terms of how actually training in digital skills must be done, and this is through the combination of seminars, "learning by doing", in the form of team building. Additional comments include that trainings should not be short-term, because of low impact, should be provided during weekends and outside of the usual work environment. It was not stated directly by the respondents, but it is evident by the answers that they envision an external company as provider of the training.

No separation was made between managerial, supervisory and operational levels when considering digital skills, maybe due to the small size of the companies.

**Environmental/Green skills .** In the opinion of respondents those set of skills refers to recycling, separating waste, careful use and reuse of paper. It is agreed that at this stage in Bulgaria the "green skills" issue does not yet seriously affect the environment and almost nothing is done to protect the surrounding environment. Thus, at the moment environmental/green skills are not a priority and not considered as important and there are no trainings provided.

**Social Skills .** The most important skills for this group are interpersonal communication, intercultural competencies, ability to listen and understand the clients and the partners, ability work in a team, quality assurance. At the moment they are also considered as shortages, due to the lack of training, inability of managers to look into the future needs of the company and lack of financing.

In the opinion of the respondents training for social skills should be delivered exclusively by external companies, specialised in HR, which should conduct a moment report on the current situation of the company and give directions for its future development. Additional training needs are – how to increase sales, skills to drive customers to purchase.

Training for those skills is mainly done through an external company in form of team building, and this form is considered as appropriate, but one of the respondents also adds that role plays and work with psychologist will be a valuable addition in the training of social skills.

**Training and Consultancy Agency - current skills needs, skills shortages, current (access to) training provision in relation to skills sets:**

**Digital Skills.** Training and Consultancy agencies were more concrete with the digital skills. Good computer literacy skills, basic skills for working with digital devices, working with specialized training programs, software and applications, experience with property management systems (Opera, Clock, etc), online programs for planning and organising the work (e.g. Trello), working with scanning devices and cyber security are noted as current need. Thus, those stakeholders are much more aware of technologies used in tourism nowadays. However, the only current shortage mentioned is the skill of working with robots. When asking about the importance of these in the future, all interviewees share the same opinion that it would be “unthinkable to work without them”, because each type of technology helps (in their opinion) to facilitate the workflow when it comes to organizing and keeping deadlines, they facilitate overall development and are essential for sustaining competitive advantage.

Training, here, should be looked from two sides, when the agencies train their employees and when they provide it for their customers. In both cases, the interviewees give the following as current training methods used: lectures, seminars, conferences, forums, exchange of experience, monthly meetings and discussions with leading companies targeting digital and software products in tourism, etc. In addition, the respondents note that the most appropriate training method must be chosen after an assessment of the training needs and a benefit assessment - the actual cost and it should be a combination of several different methods.

No separation was made between managerial, supervisory and operational levels when considering digital skills, although here the sample includes companies of various sizes.

**Environmental/Green skills.** All skills that will help humanity to preserve the natural environment, biodiversity and to reduce the consumption of natural resources, such as recycling, waste management, energy and water efficiency management. All of the previously mentioned are current needs, but yet no shortages were mentioned by respondents.

The answers regarding the current training provision are separated in two sides – either companies do it (by lectures, seminars, discussions with companies specialists in “green skills”) or they do not at all. However, in terms of future ideas of training it is pointed that presentations of best practices adopted by other companies and “show and tell” would be the most effective for this set of skills.

**Social Skills.** The most important skills needs at the moment are creativity, fast reactions, ability to analyse people and situations, ability to predict and understand customer needs, ability to communicate, ability to work in a team, social tolerance, gender equality, intercultural awareness, problem solving, ability to handle complaints, accuracy and diplomacy and quality assurance. In the case of social skills, the respondents note a difference between managerial and operational levels, whereas for the management leadership skills are considered as very important.

In this group part of the respondents note that they are the ones that conduct such training for other companies, but they also point out that they make sure their own capabilities are up to date. The training methods for social skills mainly used are seminars, professional meetings, lectures, discussions etc. Others note that they search for information on their own and they conduct online trainings internally without the use of a company or they just use the competencies of their managers.

The most effective training for social skills is “Act-Discuss-Apply”, it should be done face-to-face, with actual and precise examples and situations, within a team building approach.

**Food & beverage - current skills needs, skills shortages, current (access to) training provision in relation to skills sets:**

**Digital Skills.** The respondents from this sample note that at the moment they are totally dependent on the digital skills and the good computer proficiency, but none of them clearly identifies, which are the particular current digital skills that they need. When speaking of shortages, though the answers are in two extremes - a lack of trained personnel, which can competitively apply digital skills and absolutely none shortages. Whereas in the second case it is noted that the company efficiently uses all innovations in the sphere of digital marketing and the internet, social medias, etc.

Training for the Food and Beverage industry is done entirely by external agencies specialising in digital technologies and software products, mainly through seminars and courses for Software Learning, Online Sales, Business Profile Management and Social Media management. In addition, respondents' share that it is extremely effective to share experience with other leading and established organizations and that overall investment in training is considered as beneficial for the development of the company.

**Environmental/Green skills.** Careful use of all products, water and energy efficiency management, waste management, recycling – all of these considered as important nowadays by this sector.

Trainings are held internally by using companies standards and in the sphere of recycling, water and energy efficiency, food waste control, waste management, and this is what should be done in terms of training for green skills.

**Social Skills.** Mostly the same as the ones mentioned by the other groups of respondents, but rather limited – ability to communicate, social tolerance, understanding customer needs and intercultural awareness.

Trainings are done mostly by the actual companies and external training providers are sometimes used.

The most efficient methods for training social skills are role plays, social games, psychological games, job rotation, apprenticeship, etc. One interesting note was made by one of the respondents, who state that building a psychological profile for each employee is a very important prerequisite in the choice of the proper training method for social skills.

**Accommodation providers - current skills needs, skills shortages, current (access to) training provision in relation to skills sets:**

**Digital Skills.** Overall there is an agreement between the interviewees that the current skills that their companies need are – general computer proficiency, work with internet and office programs, hotel software, online security procedures, data analysis software, audio and video systems, development and management of websites, work with social medias, research and follow up on new applications and possibilities in social medias, online reservation systems and internet systems for payments.

In terms of shortages, accommodation providers consider that there is a need of continuous improvement of the previously mentioned skills, and that direct managers must trigger this process and personal engagement would be required on operational level. Furthermore, current shortages in this sector are mainly connected with the marketing and sales activities (or department)

- Ability to compile digital surveys and learn digital techniques for high speed exploration of the needs of customers;
- 2D and 3D image software;
- Video processing for advertising purposes;

Current trainings for this group of respondents range in direction, style, methods and providers. Directions include specialized hotel software, extranet, coding and alarm systems, reservation systems, mobile

applications, e-marketing, systems for digitization of information, etc. Both internal and external training is adopted based on the size and management of the company (individual hotel or part of a chain). Mainly training is done through webinars, regular meetings with partners from on-line platforms and by high-quality IT specialists, but only for big properties.

Accommodation providers perceive that webinars are a good method for training in digital skills, because of the high level of visualization, interactivity and is considered as financially more effective. MOOCs and online trainings were also mentioned as a good training method, combined with practical assignments so they can be implemented in reality, as well as video presentation with the participation of a trainer.

**Environmental/Green skills.** Skills needed for the effective management of all processes and operations leading to environmental protection and to sustainable development. Particular skills are considered to be – water and energy management, waste management, recycling and composting, paper use reduction, separation of waste, use of rain and underground waters – and all of them are noted to be important current needs.

Trainings in green skills are not considered as a priority at the moment. For hotels that are part of a chain however they are set as compulsory standards that must be followed. However, in the future it is considered as important to improve the information provided to all employees, leading by particular trainings in the form of seminars and movies,

**Social Skills .** For this group the most important skills needs are communication skills (interpersonal and intercultural), ability to analyse people and situations, ability to predict and understand customer needs, ability to work in a team, race and religion tolerance, gender equality, problem solving, proactivity, accuracy and quality assurance.

There are quite various statements in regard to current training for social skills. External companies, using the standards of the chain, internally developed training methods and procedures, or none. In all cases the themes of the skills correspond to the current needs and shortages mentioned above.

The training methods that are considered as most appropriate for these set of skills and according to accommodation providers are lectures, role plays, videos and PBLs.

**Theme 2: The future of tourism.** A summary of respondents' ideas of tourism and the tourism industry in general and his/her company in particular in ten years' time (2030).

**Tour operators / travel agents: what will tourism and the industry look like around 2030?**

Gradually more firms will rely on internet advertising, staff will need to be more technically literate (as opposed to now), the work of agencies will be increasingly organized into "work systems" so that the agent can do more and more things alone. On the other hand, this would not lead to a reduction in the number of agency staff as the systems will need maintenance. Companies will expand the number of destinations they offer. A trend in recent years has been to increase the share of people who want to travel organized to more distant destinations, which in turn are more affordable due to airfares (more and more low-cost companies are gradually imposing their concept in the policy of regular aviation compartments). The airlines themselves are increasing their destinations, which allows for the development of increasingly interesting and unconventional routes at good prices for groups. More and more tourists will be interested in special interest tourism, sustainable tourism and they will become more demanding than ever.

There is a tendency in the increase of the number of employees. Training and development opportunities provided to employees will be of a great importance for limiting staff turnover. It will be inconceivable to hire people without excellent digital literacy. The focus will be put on employee qualities such as adaptability, awareness, curiosity and change, interest in continuous improvement of skills, better computer skills, less use of the phone, and more on social networks and chats on the site. Future employees will be more responsible and ambitious to work.

**Training and Consultancy Agency: what will tourism and the industry look like around 2030?**

The tourism industry will be greatly affected by many factors, such as climate change, technologies and AI, geopolitical changes, demographic tendencies. Many new destinations will emerge and others will lose their popularity. All companies that are part of the industry will have to become much more flexible and adaptable to changes, which will occur in a speed, far greater, than the one companies are used to. More and more companies will realise the importance and the power of the well-educated, informed and trained personnel. Digitization and robotization will be present to a very large extent in the hotel industry. A very large part of the activities / operations carried out by people will be replaced by digital products and robots.

Tourists will become more and more informed, more knowledgeable, requiring not only comfort, quality service but also the experience that is an integral part of the tourist service. They will be much more nature-oriented, use go-grey products and services.

In the short term, the shortage of employees and workers will be deepened. Not only skilled workers will continue to be lacking, but skill shortages will deepen because new times will require new skills and Bulgarian employers still have no habit of thinking and acting long-term in terms of human resources. Required skills that employee must have will be: service people with special needs, handling sensitive personal information, intercultural communication skills in hotel services, using foreign languages in tourism, counselling on nature conservation, stimulating interest in nature, impact of tourism on the environment, etc. And those skills, on the other hand, will require new training methods and more flexible training approaches for employees.

### **Food & beverage: what will tourism and the industry look like around 2030?**

As a whole, the tourist industry in Bulgaria, will not undergo radical changes, will continue to rely on the traditional summer family and winter tourism. It is a fact that there is a trend in the development of conference tourism, wine tourism, etc.

Lower positions will still be filled by underqualified personnel, and the expectations towards managers will increase. Top positions will require more experience, education and professional training.

### **Accommodation providers: what will tourism and the industry look like around 2030?**

Changes that occur and are expected to occur in the industry will be related to the proper development of human potential and new technologies. This industry will continue to grow because the middle class is growing and more people travel. The proportion of third-age people will increase. With the opening of Europe to Asia it is assumed that more tourists will come from this market, looking for cognitive tourism and experiences. Greater attention will be paid on political and conditions in 10 years because of the recent dynamics experienced.

The role of the client - he will continue to "develop", seek something new, approve, reject. When we talk about the future, we are also talking about changing generations. Accordingly, the "new" customer will accept the changes more easily - digitization, online reservation systems, software and robotics compared to the past generation of tourists. However, they will still be looking for human relationships, seeking small gestures, attention, attitude, etc. Business guests will be looking for mobile offices - rooms with uncompromising quality of business service. Due to the high mobility and the growing accessible travel routes - customers will be from "all directions of the world", leading to highly diversified tourism demand. So there will be opportunities to build any new types of hotels - not only urban, holiday, but - wedding, gastronomic, entertaining, adventurous, scientific, etc.

Higher productivity (CPU) frames will be needed. Wages will be increased. Skills will have to be highly digital because of the tendency to automate processes and life as a whole. In addition, hotel staff will need to increase their social skills. People who will work in tourism will be those who are ready to accept the new and take advantage of the advances in technology. The number of people will decrease, but the human factor will not be replaced. People will need visionaries with the ability to take responsibility.



**Theme 3: Digital skills.** A summary of the digital skills rated as the most important in ten years' time by interview participants.

**The respondents working at tour operators / travel agents consider the following digital skills as the most important in ten years' time:**

This group considers that the digital skills they mention as current will be of a greater importance in the future. They also believe that everything can change with artificial intelligence, which will make work easier, but what will be dropped is the use of stationary computers, monitors, printers and scanners, and skills for working with AI will be crucial. Respondents also add that content management, photoshop, design, ability to work with more than one system and clever refinement and coordination in working with various mobile devices and applications are also skills that will be needed in the future.

The accelerated technological change is considered to be the trigger to the inevitable need to constantly update employee skills, the increase in training and overall need to change mentality towards new technologies and their adoption.

**The respondents working at training and consultancy agencies consider the following digital skills as the most important in ten years' time:**

Not all respondents are clear about what digital skills will be important in the future. However, the ones that answered this question gave the following directions:

- cyber security
- artificial intelligence
- free fluency in online communication
- virtual reality
- 3D technology
- wider use of digital and mobile devices, using special programs and applications

**The respondents working in the accommodation sector consider the following digital skills as the most important in ten years' time:**

This group also considers that the current digital skills that are needed will not change in the future, but greater to full fluency will be expected and will no longer be perceived as special, but basic.

Digital communication between departments (mentioned by several respondents), as well as providing tablets for the guests not only for the purposes of communication but also to improve services provided immediately.

**The respondents working in the food & beverage sector consider the following digital skills as the most important in ten years' time:**

The only addition this group gives is the mechanization and robotics in individual units (service and housekeeping).

**Theme 4: Environmental management ('green') skills.** A summary of the environmental management skills rated as the most important in ten years' time by interview participants.

**The respondents working at tour operators / travel agents consider the following environmental management skills as the most important in ten years' time:**

All of the current will become crucial and emergent, if they proceed to be regarded as not so important and not of priority at the moment.

**The respondents working at training and consultancy agencies consider the following environmental management skills as the most important in ten years' time:**

Respondents agree that all of the mentioned as current will be the same for the future, but will be considered as crucial at a company level and not only on an industry level as it is today.

**The respondents working in the accommodation sector consider the following environmental management skills as the most important in ten years' time:**

Mainly depend on the policy set by the government in Bulgaria, the economic condition of the tourism industry and the markets that will be targeted in 2030. Respondents just repeat the current without making any concrete projections on which ones will be of greater importance or which ones should be added to the list.

**The respondents working in the food & beverage sector consider the following environmental management skills as the most important in ten years' time:**

Respondents do not give any particular additions as skills, but rather mention that the current will be more important in the future due to the overall direction of development and the essence of the tourism industry.

**Theme 5: Social skills.** A summary of the social skills (i.e., personal-, communication/cultural-, and diversity skills) rated as the most important in ten years' time by interview participants.

**The respondents working at tour operators / travel agents consider the following social skills (i.e., personal-, communication/cultural-, and diversity skills) as the most important in ten years' time:**

Communication skills in all forms and ability to understand and work efficiently with different cultures, religions, genders, age, race etc.

**The respondents working at training and consultancy agencies consider the following social skills (i.e., personal-, communication/cultural-, and diversity skills) as the most important in ten years' time:**

The only point concerning social skills is the communication in all of its aspects and forms.

**The respondents working in the accommodation sector consider the following social skills (i.e., personal-, communication/cultural-, and diversity skills) skills as the most important in ten years' time:**

All of the respondents agree that the current needs, will also apply in the future, whereas due to the advancements in technology, some might be perceived as not so important.

The ones precisely mentioned are the different religions tolerance and social tolerance, as well as nonverbal communication.

**The respondents working in the food & beverage sector consider the following social skills (i.e., personal-, communication/cultural-, and diversity skills) as the most important in ten years' time:**

For the Food and Beverage sector those would be social affiliation and minorities integration;

**EXTRA.** A summary of relevant additional comments by interview participants.

**Training and consultancy agency:**

“You made me look at the future and the development of tourism and the HR training from another perspective. Definitely we will focus more on the future skills training, rather than current. We will be happy if we get the chance to enhance our knowledge during the implementation process of this project and at some point you to be our mentors.