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**COUNTRY
SKILLS
PROFILE
REPORT**



BULGARIA



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TABLE OF CONTENTS

INTRODUCTION	5
1. GENERAL TOURISM CHARACTERISTICS, FACTS & FIGURES OF BULGARIA	6
1.1 TOURISM FACTS & FIGURES	6
1.2 TRAVEL AND TOURISM'S CONTRIBUTION TO EMPLOYMENT.....	11
1.3 DIRECT AND TOTAL CONTRIBUTION OF TOURISM TO GDP IN 10 YEARS' TIME	11
1.4 DIRECT AND TOTAL CONTRIBUTION OF TOURISM TO EMPLOYMENT OF TOURISM IN 10 YEARS' TIME	12
1.5 MAIN FOCUS POINTS OF NATIONAL STRATEGY FOR TOURISM	13
1.6 COUNTRY-SPECIFIC CHALLENGES AND DEVELOPMENTS IN TOURISM	15
2. CURRENT SKILLS TRAINING DELIVERY IN BULGARIA	17
2.1 DIGITAL SKILLS	19
2.2 GREEN SKILLS.....	24
2.3 SOCIAL SKILLS	27
3. SURVEY RESULTS	30
3.1 DIGITAL SKILLS	31
3.3 SOCIAL AND CULTURAL SKILL SETS	38
4. EXPERT INTERVIEW RESULTS	41
4.1 THE FUTURE OF TOURISM AND TOURISM EMPLOYMENT.....	42
4.2 DIGITAL SKILLS.....	54
5. BEST PRACTICES UPSKILLING AND RESKILLING.....	70
REFERENCES.....	92
APPENDICES	95



EXECUTIVE SUMMARY

The Bulgarian tourism industry is renowned primarily for its mass beach tourism, with significant potential in winter, cultural, and spa tourism. It contributes notably to Bulgaria's GDP and employment, showcasing resilience and recovery post-pandemic. The country's rich cultural heritage and natural attractions, coupled with its status as a year-round destination, underline its tourism appeal.



The country is rich in cultural heritage and natural attractions.

According to the WTTC (2022) the direct contribution of the travel and tourism industry to Bulgaria's GDP was BGN 6,537.8 mln (USD 3,953.2 mln), constituting 4.9% of the country's GDP in 2021. In 2022 Bulgaria welcomed 10,887,952 visitors to the country, and 5 352 690 of them were from the EU (NSI, 2023).

The primary survey conducted among tourism professionals, HR managers, and decision-makers in Bulgaria aimed to investigate the gap between current and future skill levels in the tourism industry, focusing on digital, green, and socio-cultural skills. A total of 131 responses were collected across various sectors of tourism, revealing significant insights into current proficiencies and future needs.

Respondents reported high proficiency in basic digital applications and digital marketing but identified substantial gaps in more advanced technologies such as AI, AR/VR, and robotics. The largest gaps were noted in the use of digital technologies to create guest experiences. Green skills were identified as the least developed, highlighting a need for targeted training and development in these areas. The survey showed high current proficiency levels in effective communication and customer service skills. However, it also identified gaps in the ability to communicate in guests' native languages and adaptability to change, underscoring the importance of these skills for future tourism industry demands.

Expert interviews provided deeper insights into the evolving landscape of tourism employment and skills development. The results revealed a dynamic shift in the Bulgaria's tourism industry, emphasizing the need for a holistic approach to skills development. This includes embracing digital technologies, enhancing green practices, and nurturing socio-cultural competencies to ensure the sector's resilience and adaptability in the face of future challenges.

The identified Best practices include innovative training programs and partnerships aimed at addressing skills gaps. These initiatives highlight the importance of continuous learning, adaptability, and the integration of technology and sustainability into tourism practices, setting a path for future development and competitiveness in the Bulgarian tourism industry.



INTRODUCTION

The Erasmus+ PANTOUR Project is a European partnership for improving a collaborative and productive relationship between education and industry. PANTOUR is the follow-up project of the NTG project (Next Tourism Generation Skills Alliance; 2018-2022). The PANTOUR project aims specifically at designing innovative solutions to address skills needs in tourism.

With the exploitation of its outputs, PANTOUR seeks to benefit job seekers, employed and unemployed workers from the tourism industry, employers, SMEs, sector associations and policy makers. Therefore, it has dedicated special attention to the reskilling and upskilling of the generic workforce on future skills needs. To be able to achieve this goal, research has been conducted in every country of the project consortium, to investigate the future of tourism, skills gaps between current levels of skills in the tourism industry and the future skills needed in the future.

As a start, up to date information is needed. This will be covered with this Country Skills Profile Report: a comprehensive document, covering one country that provides an in-depth analysis of the general tourism and skills landscape, gaps, needs and workforce capabilities within a particular country. It serves as a valuable resource for policymakers, government officials, employers/employees, and educational institutions to understand the current state of skills and make informed decisions regarding workforce development strategies.

The purpose of this Country Skills Profile Report is to provide on the basis a comprehensive overview of the following:

General information of each country in the PANTOUR consortium regarding tourism and tourism employment, i.e., tourism facts & figures;

Summary of the current situation regarding the delivery of Digital, Green and Social Skills training provision for the main types of suppliers of education/training;

Analysis of online survey results within each country in the PANTOUR consortium, held among tourism professionals, HR managers and decision makers;

Overview of contemporary developments in tourism, trends in tourism employability, and the existing gaps between current levels of skills in the tourism industry and the projected future skills needed in 2030;

An inventory of Best Practices (i.e., innovative initiatives, projects, programs, philosophies, tools, methods, ideas, solutions, and concepts) in relation to upskilling, reskilling, attracting, and retaining staff in order to improve the knowledge on digital, social, and green skills development in tourism.

1. GENERAL TOURISM CHARACTERISTICS, FACTS & FIGURES OF BULGARIA

The primary aim of this chapter of this Country Skills Profile report of BULGARIA is to elaborate on general information and give a summary of the tourism situation in the country. This is conducted by collecting and analysing data from country sources and summarising these. The analysis is built upon existing online sources, course content, reports, existing research results, articles, books.

1.1 TOURISM FACTS & FIGURES

Tourism globally

The tourism industry is a vast and complex sector that encompasses many industries, including accommodation, transport, attractions, travel companies, and more. According to the international statistics portal Statista (2023 [1]), the total contribution of travel and tourism to the global economy was \$ 7.71 trillion in 2022 (Statista, 2022), a 7.6% share of the total global GDP, remaining 5% below pre-pandemic levels.

Prior to the pandemic, Travel & Tourism was one of the largest sectors in the world and accounted for 1 in 4 jobs. Growth is expected at 5.8% annually between 2022 and 2032, outpacing the general economy.

The same source (Statista, 2023 [2]) reports that the number of international tourist arrivals worldwide was 963 million in 2022.

According to another study of Statista (2023), global employment in the travel and tourism sector rose slightly in 2022 over the previous year, following a sharp drop with the onset of the coronavirus pandemic. Despite the increase, the number of travel and tourism jobs worldwide remained below pre-pandemic levels, totaling 295 million in 2022. As forecast, this figure is expected to grow to 320 million in 2023 and to 430 million in 2033.

1.1.1 Contribution of travel & tourism to GDP in Bulgaria

Bulgaria is mostly known as a mass beach tourism destination, with additional opportunities for development of winter, cultural and spa tourism. The most popular tourist areas are located along the Black Sea coast and in the mountains, while the health, spa and wellness resorts are dispersed throughout the countryside. Because of its preserved nature and diverse cultural and historical heritage, Bulgaria offers plenty of opportunities for cultural, congress, adventure, rural, ecological tourism and camping.

According to the WTTC (2022) the direct contribution of the travel and tourism industry to Bulgaria's GDP was BGN 6,537.8 mln (USD 3,953.2 mln), constituting 4.9% of the country's GDP in 2021. The pandemics in 2020-2021 caused significant drop in the total contribution in the GDP from BGN 13,115.4 mln (USD 7,930.6 mln) in 2019 and share (9,9% in 2019). In a similar vein, in 2021 travel and tourism jobs were 250.3 thousand, constituting 7.2% of total number of jobs in the country, whereas in the benchmark pre-covid 2019 this contribution was 316.3 thousand jobs and 9.0% of the total jobs (WTTC, 2022).

1.1.2 Size and relevance of the subsectors

In 2022 there were 4031 accommodation establishments in Bulgaria, which is around 10% above the benchmark year 2019 when this number was 3664, showing that the Bulgarian tourism industry has fully recovered after the pandemics (NSI, 2023). The methodology of data collection by the Bulgarian National Statistics Institute considers only accommodation establishments with more than 10 beds.

There is a national Register of tour operators and travel agencies, but it is too dynamic and not possible to filter out the operational ones only (Ministry of Tourism, 2022). The same is valid for the Register of F&B outlets.

Bulgaria boasts with very rich cultural and historical heritage, but many of the sites are under the management of Ministry of Culture and are not open for visitors. In the country there are 3568 registered cultural and historical tourist attractions (Ministry of Tourism, 2023), and over 1900 festivals and cultural events (Ministry of Tourism, 2023). The registered museums for 2022 are 186, and they welcomed 4,001,306 visitors in 2022 (National Statistical Institute, 2023c). Currently, Bulgaria has 10 properties inscribed on the World Heritage List under UNESCO protection (UNESCO, 2023).

In addition, Bulgaria has opulent natural tourist resources, including mountains, caves, forests, interesting rocks, mineral springs, etc. Still, the largest and most popular tourist area is undoubtedly the Black Sea coast with its 378km total length, from which around 130km are sandy beaches. The mild moderate to sub-tropical climate on the coast, combined with a lot of entertainment activities is the basis for the rapid development of the Bulgarian mass tourism industry in 1960-2000. Nowadays, the country positions itself as a Four-seasons destination, offering numerous attractions during the entire year.

NB! In Bulgaria there are a few publications/strategies/programmes/analyses, developed for a particular tourism subsector. Usually the projects/programmes are prepared for the tourism industry as a whole.

In 2022 Bulgaria welcomed 10,887,952 visitors to the country, and 5 352 690 of them were from the EU (NSI, 2023). The majority of the incoming tourists were from the neighbouring countries with Romania as a leader, followed by Germany, Greece and Poland. Another 4 434 280 visitors to Bulgaria came from other European countries, outside of the EU, e.g. Turkey, Ukraine, Serbia and North Macedonia. This visitor structure could be attributed to the COVID-19 outcomes, i.e. people prefer to travel to closer, neighbouring destinations, and using their own vehicles.

The overall number of overnights for 2022 is 24 173 291, including 12 886 955 by foreign tourists. In 2022 outgoing Bulgarian tourists were 7 252 301 and they travelled mostly to the EU (3 292 786), and in particular to Greece, Romania, Turkey and Germany (NSI, 2023).

1.1.3 Share of different transportation modes (plane, car, train) in tourism

Bulgaria has four international passenger airports – Sofia, Varna, Plovdiv, and Burgas. The Black Sea coast airports (Varna and Burgas) serve mainly charter flights, coming to the main beach resorts Sunny beach, Golden Sands, Albena, Sts. Constantine and Helena. In the last 5 years several low-cost airlines established their bases in Bulgaria, which increased the number of whole year round flights and more evenly distributed tourist flows. The majority of foreign tourists come to the country by air (mostly charter flights), and by car (especially tourists from the neighbouring countries like Romania, Greece, North Macedonia, Turkey).

Bulgaria's water borders are along the Danube River and the Black Sea coast. The primary seaports offering marine transport in Bulgaria are Varna and Burgas ports. Along the Danube River there are also river ports serving tourists with Ruse being the major one, welcoming many cruise passengers as well.

The railway infrastructure of the country is well developed, but the condition of trains and wagons needs significant upgrade. The railway transportation is used mainly by the local population for commuting and for domestic trips. The road network in the country consists of limited access highways, first-, second- and third-class roads. Bus transport is well developed. There are express buses serving most of the large towns and cities in the country. There are international bus lines to most of the European capitals and to other European cities. The majority of the domestic tourists prefer their own automobiles for travelling around the country, and often for their trips abroad, especially to the neighbouring countries like Greece, Turkey and Romania.

1.1.4 Arrivals of international versus national tourists

According to the WTTC (2022) international visitor spending in Bulgaria has decreased from 5,461.6 mln USD in 2019 (88% of all visitor spending in the country) to 2,370.5 mln USD (80% of all visitor spending) in 2021. In the same time, domestic tourist spending also had a drop from USD 752.2 mln (12% of all spending) in 2019 to USD 591.5 mln (20% of all visitor spending) in 2021, but the share of domestic tourism has increased, again as a result of the pandemics and the trend of people travelling in their own countries, rather than abroad (Ivanova et al., 2020).

From the 10 887 952 foreign visitors to Bulgaria in 2022, 39,24% came for leisure and holiday, while 11,34% came for business. The rest 49,42% visited the country for any other reason (transiting, visiting friends and relatives, etc.) (National Statistical Institute, 2023a).

In Bulgaria the majority of the tourist companies are small, micro and nano companies. For example, the National register of accommodation establishments shows over 22000 registered entities, whereas according to the National Statistical Institute the hotels and properties with more than 10 beds are only over 4000 (National Statistical Institute, 2023a). The same is applicable for the travel agencies and tour companies for miscellaneous services.

According to the Bulgarian Small and Medium Enterprises Promotion Agency (2022) in 2021, SMEs in Bulgaria are 412,124, which is 99.81% of the total number of enterprises.

The most numerous are micro enterprises - 383,592, small - 24,096, and medium - 4,436. The share of micro enterprises of all SMEs is 93.08%, of small enterprises - 5.85%, and of medium enterprises - 1.07%. In the Accommodation and food services sector number of SME for 2021 is 27161, which is 5,97% of all SME in the country. A significant drop from 7,95% to 5,97% in the share was detected due to the COVID-19 crisis in 2020-2021 (Bulgarian Small and Medium Enterprises Promotion Agency, 2022).

1.2 TRAVEL AND TOURISM'S CONTRIBUTION TO EMPLOYMENT

In 2021 travel and tourism jobs were 250.3 thousand, constituting 7.2% of total number of jobs in the country, whereas in the benchmark pre-covid 2019 this contribution was 316.3 thousand jobs and 9.0% of the total jobs (WTTC, 2022).

1.3 DIRECT AND TOTAL CONTRIBUTION OF TOURISM TO GDP IN 10 YEARS' TIME

COVID-19 interrupted a very positive trend of tourism growth in Bulgaria for the last 10 years. Now the sector is reviving and the forecasts are that by 2023 it should reach the benchmark 2019 levels. However, the instable political situation nearby (the war in Ukraine and the refugee flows to the country) are disturbing the optimistic views for now. Anyway, the tourism sector is considered as a major contributor to the GDP, that is why Bulgaria will continue developing it in the next decades.

1.4 DIRECT AND TOTAL CONTRIBUTION OF TOURISM TO EMPLOYMENT OF TOURISM IN 10 YEARS' TIME

The authors of this report did not find any official government forecasts about the development of tourism employment in the future. The authors consider that tourism will continue to be a significant employer in the country due to the huge investments in construction of accommodation establishments and the expansion/renovation of airports.

However, the growing demand for labour in tourism may not face a significant increase in the supply of labour due to the low birth rates and emigration that lead to a shrinking population and labour shortages in the country. It may turn out that in 10 years, immigrants will constitute a significant share of tourism employees in the country. The recent events like the war between Ukraine and Russia, or the continuous flow of immigrants from Middle East, Asia and Africa generate a certain potential of available labour force. However, besides the administrative issues (e.g. visas, permissions to work, legal residence, etc.) those people definitely would need training, in order to work in the tourism sector.

The training is projected to several directions: first and most important is the language skills. Immigrants usually do not speak the local language (Bulgarian), and need to learn at least another language (e.g. English, German or Russian) in order to serve the international tourists. Second, since most of the immigrants do not have specialized education/degree in tourism or hospitality, they would need training for the particular positions they apply to. In this regard, some short-term courses would be very useful and beneficial for them (Ivanova, 2023).

1.5 MAIN FOCUS POINTS OF NATIONAL STRATEGY FOR TOURISM

The main focus points of the national strategy for tourism are:

- Role of sustainability, digitisation, social impact of tourism
- Impact of COVID-19 Pandemic

Currently Bulgaria strives to improve its image of a low-cost and low-profile tourism destination and to increase its market share. The tourism sector in the country so far is characterized with high seasonality; however, the natural resources and cultural heritage of the country have a high potential which is still underutilised. In the long term, the specialised forms of tourism should be developed and offered more intensively, in order to compensate the climatic changes that influence the sea and winter tourism season.

The National strategy for sustainable tourism development 2014-2030 (Ministry of Tourism, 2017) emphasises a few ultimate goals in the future development of Bulgarian tourism:

- ✓ Transforming Bulgarian into a 4-seasons tourist destination, thus enabling optimal resource utilisation, economic growth and even distribution of the socio-cultural benefits, in accordance with the UNWTO's general vision on the tourism development.
- ✓ Adopting sustainable approach in the further development of the tourism industry, involving all the existing and newly opened business ventures.

The negative consequences of COVID-19 will be resolved through the National Recovery and Resilience Plan (2022). The Plan puts an emphasis on the Digital Transition and efforts are focused on four main strands:

- (i) the deployment of broadband infrastructure;
- (ii) enhancing the digital skills of the population;
- (iii) accelerating the deployment of digital technologies in enterprises;
- (iv) the deployment of e-Government and e-services.

The particular measures within the National Recovery and Resilience Plan, concerning digital skills include:

- ✓ Modernization of educational infrastructure;
- ✓ Establishment of STEM (Science, Technology, Engineering and Math) centres and innovations in education;
- ✓ Provision of digital skills trainings and set-up of a platform for adult learning;
- ✓ Establishment of Youth centres. (National Recovery and Resilience Plan, 2022)

The Youth centres are aiming at involving and engaging young people from vulnerable groups in joint initiatives and sharing common values with their peers. This is a way to help young people get socialized, but also assisting them get oriented for their future career, skills or education and training they need. As stated in the National Recovery and Resilience Plan: “Maintaining the interest of students and young people in education and the acquisition of new skills, participation in joint initiatives and sharing common values with their peers, including participation in national and international initiatives will not only help the integration and socialization of young people from vulnerable groups, but will allow the formation of a positive attitude among young people for development and realization in Bulgaria”.

1.6 COUNTRY-SPECIFIC CHALLENGES AND DEVELOPMENTS IN TOURISM

According to the National strategy for sustainable tourism development 2014-2030 (Ministry of Tourism, 2017) the country is experiencing major challenges, regarding human resource management and development:

- Lack of certain business strategies for the human resource development
- Limited investment in the personnel development
- Limited trainings on company and regional level – e.g. language courses, introduction of new technologies and services, etc.
- Lack of cooperation among the companies for staff exchange and development
- Lack of specialised personnel for positions that are new and current, for middle management positions, for the so-called "rare" specialists (in golf tourism, some spa and wellness treatments, massages, etc.), etc.;
- Training conditions for occupational areas with special requirements to tourist activities have not been established yet; it has also not been established in which areas there is a need for new occupations (Ministry of Tourism, 2017)

In addition, there is no a unified state strategy for the human resource development in the travel and tourism industry, as well as generally weak links between the educational institutions and the industry. A certain problem, which is specially underlined is the lack of a precise evaluation on the tourist employers' need of staff with particular knowledge and skills.

The recently established network of Local Action Groups (LAG) is a classic form of public-private partnership, focused on the development and revival of remote regions in the country. A special focus of those LAGs is the stimulation of rural and farm tourism, because of their importance for the employment and funding opportunities for the overall economic and social development of those regions (National Association of Local Action Groups in Bulgaria, 2018).

According to a recent analysis of the Ministry of Economy (2021), SMEs prefer training only for core company-specific activities while foreign languages, ICT skills, marketing and sales, including exports, are considered as useful by less than a half of the SMEs. These attitudes may further explain the observed very low levels of vocational trainings, life-long learning and other SMEs training activities in Bulgaria compared to EU 28. The lack of adequate and objective assessment regarding the current and required level of specific skills and competences is a great barrier to increase SMEs awareness of the actual skills gap and to implement adequate human resource development strategies based on accurate information. One solution would be the availability of online tools for self-assessment, which would contribute to more objectivity in perceptions regarding the level of development of particular skills and competences in SMEs (Ministry of Economy, 2020).

2. CURRENT SKILLS

TRAINING DELIVERY IN

BULGARIA

In this chapter, you will find an overview of the training delivery of digital, green and social skills sets in BULGARIA. This is conducted by collecting and analysing data from country sources and summarising these.

The tourism education in Bulgaria encompasses the secondary and higher education, and vocational training, i.e. level 3 EQF (EU Qualification Framework)/NQF (National Qualification Framework) and higher. There are vocational secondary schools, profiled in the tourism sector, where students study modules, typical for the tourism industry – they are called Vocational schools of Tourism (e.g. Sofia Vocational High School of Tourism, spgt.org). The diploma of such vocational schools (level 3 and 4 EQF/NQF) certifies abilities, skills and competences of jobs like waiter, cook, animator, tour guide, receptionist at a hotel, etc. The upper secondary education now is fully dedicated to such professional modules.

Sixth and higher EQF/NQF levels of education in tourism are provided by universities and colleges. Currently, in Bulgaria there are 14 higher education institutions offering programmes in tourism and hospitality. While some of them have a broader scope (e.g. Tourism Management, International Tourism, Leisure Management, etc.), other programmes have a greater industry focus (e.g. Hotel Management, International Hospitality Management, Catering, Rural and eco-tourism, Hiking guides, Sports animation, etc.). Level 6 programmes (Bachelor) are studied in 13 out of the 14 HEI, and Level 7 programmes (Master) are provided in 10 of the 14 HEIs. Only 7 universities in Bulgaria are accredited to conduct level 8 (Doctoral) education in tourism.

Professional/Vocational colleges focus mostly on practical skills and knowledge for operational level jobs positions in tourism / hospitality companies. According to the official state register (NAVET, 2022) 448 VET centres offer vocational courses related to any sub-sector of the tourism industry. The courses encompass numerous skills and competences, addressing the demand for adult learning and upgrading current education. However, the compliance with the EQF ECTS is still under preparation. The VET Centres usually correspond with level 5 of the NQF/EQF.

Despite the review of educational and training centres has identified numerous educational institutions capable of addressing the increasing demand for qualified tourism professionals, a fundamental issue is the lack of people wishing to work in the industry (Ministry of Tourism, 2017). Additionally, the links between the education sector and industry are weak and there is a dearth of information regarding the level of demand for employees with specific tourism knowledge and skills (Ministry of Tourism, 2018a). While currently there is no state strategy for skills development in the travel and tourism sector, there is acknowledgement of the need for a national programme for the development of human resources in tourism (Ministry of Tourism, 2018b). The current focus however, is on attracting and retaining staff, rather than on education, training or skills development (ibid, 2018b). The Ministry of Tourism signed a special agreement with the Ministry of Labour and Social Policy aiming to enhance education and training for jobs related to the tourism industry. The aim of this is to address the needs of businesses and to upgrade skills and competencies of tourism employees (Ministry of Tourism, 2018b). Moreover, an Interdepartmental Council of Human Resources in Tourism was established in 2016 as a consultative public-private body to the Minister of Tourism in the field of human resources in tourism. It includes experts from educational and training institutions, as well as the tourism business..

2.1 DIGITAL SKILLS

Digital skills development is a priority of several state strategies like: National Development programme Bulgaria 2030 (Ministry of Finance, 2022), National employment strategy of Bulgaria 2021-2030 (CEDEFOP, 2022), National programme Digital Bulgaria 2025 (Ministry of Transport and Communication, 2019), strategy “Digital transformation of Bulgaria for the period 2020-2030 (Ministry of Transport and Communication, 2020), and the forthcoming Skills Strategy, which is expected soon. A lot of training activities to enhance the digital skills are included in the National Recovery and Resilience Plan of Bulgaria.

Additionally, a special project for “Digital skills training and elaboration of a national online platform for adult education” aims to educate more than 500 thousand people in the next 5 years (BCCI, 2022; Ministry of Labour and Social Policy, 2022).

The largest gaps were noted in the use of digital technologies to create guest experiences.

Since 2019 a national platform for skill evaluation is working – MyCompetence.bg. This is the outcome of another EU-funded project, which aims at improving the efficiency of national policies regarding leveraging labour market, analysis of the demanded competences and skills, identifying key jobs, elaboration of an e-platform for training, etc. The National Competence Assessment System MyCompetence is an online platform, created by Bulgarian Industrial Association (BIA), in the field of human resource management and development, which offers competency profiles and job descriptions for key positions, catalogue of competencies, assessment tools, e-learning resources and other services for assessment and development of workforce competencies.

Universities

Most of the universities providing tourism and hospitality programmes have special modules, dedicated to Information and Communication Technologies (ICT), where the content is focused on basic computer literacy and work with the main common software and operational systems (Windows, MS Office). Only a few of the university programmes in tourism and hospitality have specialised modules related to the digital skills in tourism, e.g. Varna University of Management has a module on Technologies in Tourism and Hospitality, including specialised training in PMS/hotel management software, and F&B software; College of Tourism to UE-Varna has a module on Digital technologies in hotels and restaurants; International Business School has a module on Digital transformation of business; while New Bulgarian University offers Internet communications in tourism.

VET centres and Secondary vocational schools

Currently, there are about 900 active Vocational Educational Centres (VET) in Bulgaria, and approximately half of them offer courses related to tourism, hospitality and travel industries. Most of them offer courses for traditional jobs like “hotel manager”, “restaurant manager”, “chef”, “waiter”, “tour operator”, etc. Analysis of the curriculum of such courses shows that digital skills are covered mostly in terms of general digital literacy (skills for business communication, online correspondence, etc.), and in the specific hotel software (PMS, Revenue management software) (see Appendix 1).

The secondary vocational education takes place at specialised vocational schools in tourism and hospitality. They offer education in hospitality (code 811 Hotel management, F&B/cooks, chefs and catering services) and in travel, tourism and leisure (code 812 Tourist guides, travel agents). The study curriculum is centrally determined by the Ministry of Education and Science, and is updated on annual basis (Ministry of Education and Science, 2020). It is compulsory for all secondary vocational schools in the country. The analysis of the curriculum shows that digital skills are incorporated in modules for basic computer literacy, and some modules regarding special equipment and

technologies in cooking and culinary arts. Generally, in all Bulgarian secondary schools there are modules on online communication skills (email, web-based communication, basic office applications).

Some vocational schools initiated different training in digital skills as part of particular projects (e.g. Pleven and Veliko Tarnovo vocational high schools), whereas the Vocational high school in Pernik established Club for digital competences to stimulate its members develop their digital skills and education.

Other training providers

Besides, there are numerous private organisations and training centres that provide courses, developing digital skills. In the recent years, various platforms, training campaigns, and other initiatives to encourage digital skills training and education were established, e.g. Telerik Academy, Software University, Ucha.se, etc.

A good sign that digital skills have become more appreciated is that some organisations already offer courses for digital skills trainers and lecturers. In order to teach students in digital skills, first it is necessary to have competent teachers, who have those digital skills, and are able to transfer them to the potential students. A popular platform for teachers and lecturers <https://prepodavame.bg/> is a good example of those “train the trainer” courses, e.g. digital literacy for teachers (Ivanov, 2022).

In a similar line, the project DigiFit developed special programme for trainers, teaching digital skills, aiming at elaboration of healthy relationship between young people and all digital technologies they use. In the digital era and overall proliferation of digital technology, the idea of developing awareness, self-control and good habits in the process of applying digital skills is a great attempt to anticipate and prevent possible negative effects in the future (DigiFit, 2022). Digitfit is a Project funded by the Erasmus + program with the aim to combat the negative impacts of internet dependence on the mental

health of young people and to promote a healthy relationship with the digital media. The project also trains trainers. They can support young people to recognize and prevent the negative effects that the digital world can unleash, in addition to offering them the tools to make the most of the benefits of the internet (DigiFit, 2022).

Another EU-funded project initiated digital transformation through joint actions of the social partners for the development of the specific digital skills of the workforce in enterprises. The main goals are: research of digital skills needs in economic activities, developing digital skills profiles for key positions, testing the current digital skills of the workforce through developed competency assessment tools and non-formal learning curricula to develop specific digital skills (Bulgarian Industrial Association, 2021).

Since October 1st, 2021, Bulgarian Industrial Capital Association (BICA) started the implementation of the project “Development of digital skills”. The BICA project is aimed at identifying these skills, as it envisages the implementation of a total of nine main activities aimed at developing, testing and validating unified profiles for digital skills in key professions / positions, sectoral qualifications frameworks and training programs for digital development skills in 13 pilot sectors of key importance for the Bulgarian economy. Within the project BICA has set to develop at least 65 unified profiles for digital skills, a total of 13 packages of test training programs for the development of digital skills, at least 4 models of social cooperation (Bulgarian Industrial Capital Association, 2021).

There are more than 95 business incubators and co-working spaces, concentrated in Sofia, Plovdiv and Varna, most of them focused predominantly on science and technology. At the same time, a few Bulgarian business incubators and co-working spaces include and are located in universities and research organisations. Most of the incubators have been established with the financial support of various European programs and other international initiatives.

However, many business incubators have terminated their activities during the last two decades mainly due to low quality of provided services, weaknesses in the portfolio of provided services, lack of financial resources, weak management, etc. (Atanasov, 2015). Very few, if any of those incubators target tourism companies and start-ups. One of the measures initiated in this regard was the establishment of a regional business incubator network through approved projects for cross-border business incubator programs (Ministry of Economy, 2021).

Digital skills training in Bulgaria is at its acceleration stage. The need of digital skills is already largely recognised from all sectors of the economy. Therefore, numerous national programmes and projects started with delivery of those skills. Still, at level 4 (secondary school) and level 5 (vocational education) in tourism education digital skills are quite sparsely covered – only basic computer literacy and some specialised hotel software/PMS are included in the curricula. Although there are many courses, specially focused on particular digital skills, training of digital skills in the courses targeting tourism professionals is limited.

Recommendations:

- Include more modules, related to digital skills both in secondary vocational schools and VET centres for tourism
- Elaboration of courses on general digital skills but with application in particular context, e.g. in tourism and hospitality
- Revision of the state curricula, provided to the secondary vocational schools in tourism
- Include more diverse digital skills in the curricula of Tourism programmes in the universities, or at least to raise certain awareness about them, e.g. robots, artificial intelligence, AR, VR, etc. in the context of tourism and hospitality.

2.2 GREEN SKILLS

Universities

In terms of green skills most of the universities offering tourism and hospitality programmes emphasise on the sustainability, resource efficiency and environmental management. Even in the South-West University there is a separate tourism major – Sustainable tourism where “Ecology and nature protection in tourism” and “Biodiversity conservation” are compulsory modules included in the curriculum. At the University of National and World Economy, Sofia there is a module Ecology and sustainable development in the Bachelor in Tourism programme as well (see Appendix 2).

A very distinctive fact is that universities that specialise in fields like nutrition, food technology, food science and engineering, or agricultural technologies, (e.g. the University of Food Technology, Plovdiv and University of Forestry, Sofia) have a greater tendency to include modules, related to sustainability and green skills.

VET centres and Secondary vocational schools

VET centres offer several courses related to particular jobs in tourism and hospitality. There are certain skills included in the curriculum, connected mostly with hygiene standards, HACCP (Hazard Analysis Critical Control Point) system (which is compulsory for all F&B outlet in Bulgaria), safety and security regulations, especially when working with food and beverages, resource efficiency and environmental management. We observe a very weak coverage of particular green skills.

The secondary vocational education takes place at specialised secondary vocational schools in tourism and hospitality. They offer education in hospitality (code 911 Hotel management, F&B/cooks, chefs and catering services) and in travel, tourism and leisure (code 812 Tourist guides, travel agents). The study curriculum is centrally determined by the Ministry of Education and science, and is updated on annual basis (Ministry of Education and Science, 2020). It is compulsory for all secondary vocational schools in the country.

In terms of green skills, the curriculum includes several modules, connected to Microbiology, Safety and first aid, Hygiene, Main skills in coping with fire, emergency situations, disasters and accidents.

Still, there are certain topics, related to the sustainable operations, avoiding food waste and environmental protection. However, there is no separate module, dedicated solely to acquiring green skills and competences. Usually those topics are included in the modules about hygiene, safety and security. Additionally, there are topics about standards and quality control, principles of HACCP system (Hazard Analysis Critical Control Point), sanitary and hygienic requirements of technological equipment, food storage, technological processes, potential allergens, packaging and transportation of food products, etc.

In the recent years several initiatives directed the focus to the need of green skills and special education about sustainability and environmental protection. Usually those initiatives are related to agriculture, procurement, administrative services, construction and health services. Below are some examples.

GreenSkills4VET (Green Skills For Vocational Education and Training, <https://www.greenskills4vet.eu>) is one such project. The aim of the GreenSkills4VET-Partnership is to develop exemplary learning units dealing with issues concerning the three dimensions of sustainable development (economic, environmental and social). However, the sectors chosen to serve as examples are Logistics and Health Care. Trainees and Trainers can gain knowledge and skills needed to generate green competences in their workplaces. The project ran from 2016 till 2018, but the training materials (LearnBox) are still available on the website - <https://www.greenskills4vet.eu/learnbox/language/english>, and there is a Bulgarian version as well.

Green VET net project (Green Vocational Education and Training, <https://sakky.fi/fi/greenvetnet>) is a newly established consortium, with one Bulgarian partner, aiming at the integration of sustainability aspects in VET by enhancing the competences of staff involved in VET on sustainable development. The focus is to identify core green skills that should be incorporated in VET programmes. As one of the outcomes is to elaborate a platform for peer-learning, exchange of experiences and know-how.

It helps VET staff to identify best practices on how VET can act as a bridge to the sustainable development of working life and support the green transition.

CloudEARTH*i* (<https://cloudearthi.com>) CloudEARTH is an initiative that includes a series of projects that aim to build innovation capacity of using big data in Environmental Sciences, Sustainability and Circular Economy. One of its final outcomes is to elaborate a digital platform with courses dedicated to digital innovation, artificial intelligence, but also to Earth and Environmental sciences (AccessEARTH, <https://cloudearthi.com/accessearth>).

The National Recovery and Resilience Plan has a special focus on sustainable management of natural resources, allowing to meet the current needs of the economy and society, while maintaining environmental sustainability, so that these needs can continue to be met in the long run - 37% of the resources of the Plan (National Recovery and Resilience Plan, 2022).

Implications:

Green skills training is still in infant age in Bulgaria. Many projects and initiatives are trying to raise awareness in the business, private and public institutions about the concepts of sustainability, green development and circular economy. In this regard it is expected in the next few years to increase the demand for relevant education and training in green skills.

Recommendations:

- To educate the business about the real benefits of sustainable development, and hence the urgent need of green skills for both managers and employees
- To integrate separate modules, dedicated to environmental protection, biodiversity, sustainability, etc. in the study plans of secondary schools and higher education institutions
- To organise special practical modules for demonstration of the importance of green skills from early age in schools and kindergartens
- To organise educational campaigns among tourism professionals to demonstrate the benefits and importance of being sustainable
- To raise awareness of the (tourist) business about sustainability and circular economy concepts

2.3 SOCIAL SKILLS

Universities

Social skills in university programmes in tourism and hospitality are focused mostly in elective modules, e.g. Sofia University has modules on *Psychology, Philosophy, History of arts, Cultural geography in Europe, Customer care, Business communication, Customer psychology*. UE-Varna offers modules *Social Psychology in tourism, Customer care, Culture and civilisations, Bulgarian folklore and ethnography, Service management in tourism*. South-West University has modules *Cultural tourism, World Cultural Heritage, Negotiation skills in Tourism, Business communications*. University of National and World Economy offers modules *Social Psychology and tourist behavior; Cultural Tourism*. Almost all universities include in their curriculum at least the *Business communication* module, which encompasses most of the soft and social skills (see Appendix 3).

VET centres and Secondary vocational schools

Social skills modules are represented very weakly at this level of education. There are topics, related to preparation, organisation, implementation and management of special tourist events, identification of certain trends in the industry, marketing skills for promotion and popularisation of special events, customer service and customer care. Also, in specialised modules for human resource management could be found topics regarding social psychology, service standards, communication, development of personality and career growth, social activities during special events, elaboration of social programme, corporate culture and corporate social responsibility. However, most of the above social skills are integrated as topics within the modules, not as separate modules. Therefore, very often social skills are neglected in the process of education at the expense of development of technical skills and knowledge.

Other training providers of social and cultural skills

The ESSENCE project (Enhance Soft Skills to Nurture Competitiveness and Employability, <https://projectessence.eu>) intends to improve employability

opportunities for higher education students by stimulating soft skills development. Project objective is to maximise their engagement in the labour market through offering professional development paths that go beyond formal higher education trainings. In order to meet the expectations of entrepreneurs and recruiters connected with the most desirable soft skills, the courses will be based on the demand-driven employers' perspective.

CIT4VET – Open Online Catalogue of Intercultural Tools for Vocational Education and Training (<https://cit4vet.erasmus.site>) – addresses this need for intercultural competences in VET education. The project of a consortium of partners from Bulgaria, Germany, Ireland, Italy, Netherlands and Poland, helps to improve and enhance the ability of VET Trainers to provide intercultural training by offering an online catalogue of accessible intercultural tools to be used in training culturally diverse groups intercultural training material for self-study or to be used in trainings user's guide to the catalogue with glossary of terms.

Implications

Although the most popular and recognised, it is surprising to find very few dedicated solely to social skills trainings and modules. Universities have more contents, related to intercultural and communication skills than the secondary schools and VET centres. The latter focus more on the particular technical skills required for the job, so the social skills are not such a priority. One of the reasons is because of the comparatively limited options for apprenticeships and practical exercises during the education. Generally, the theoretical background of the social skills and their role is covered, but practice is missing, so students who graduate secondary schools and VET courses have very incomplete social skills. Still, there are a lot of commercial providers that offer the whole portfolio of social skills training, mostly as corporate incentive, or to what the companies exactly demand.

Recommendations:

- To include special modules, dedicated to social and soft skills in secondary schools' curricula

- To emphasise on the practical application of social skills, so the students are able to really acquire certain social competences
- To change state standards for VET education and include more social and soft skills
- To stimulate (tourist) companies conduct at least annual training in social skills

3. SURVEY RESULTS

In this chapter, an analysis is provided of the online survey results within BULGARIA, held among tourism professionals, HR managers and decision makers. This survey aimed to investigate the gap between current levels of (green, social, digital) skills in the tourism industry and the future skills needed in 2030 – resulting in quantitative data about the skills gaps and future needs. In summary:

- *Key trends are extracted from the survey results of BULGARIA to establish how the sector is responding to the skill sets, highs, lows, current and future level of proficiency in Green, Digital and socio-cultural skills sets.*
- *An explanation and discussion of the results is provided.*
- *Gaps are indicated in the current and future level of proficiency in Green, Digital and Socio-cultural levels of proficiency. Comments are made on specific shortages or excellent/good proficiency in different skills and the areas of significant weakness.*

Total number of responses in Bulgaria	131 (including category 'Other' = 26)
Number of responses per tourism sub sector:	
Destination management organisations:	5
Accommodation providers:	51
Food & Beverage:	5
Visitor attractions:	13
Travel agents and tour operators:	31

3.1 DIGITAL SKILLS

Digital Skills

Current existing level of proficiency	<p>Highest:</p> <ol style="list-style-type: none">1. 3.79 (<i>Use of office applications (text processing, spreadsheets, presentation software)</i>)2. 3.58 (<i>Use of digital marketing systems and communication platforms (social media networks, e-mail and direct marketing systems, content management systems)</i>)3. 3.44 (<i>Digital privacy and ethics</i>)4. 3.27 (<i>Secure information processing (backing-up, cybersecurity, data protection)</i>)5. 2.89 (<i>Digital business analysis, business intelligence, data-driven decision making</i>)
	<p>Lowest:</p> <ol style="list-style-type: none">1. 1.35 (<i>Use of robots</i>)2. 1.5 (<i>Use of generative AI applications (e.g. ChatGPT, Midjourney, DALL-E, etc.) for generating text and visuals.</i>)3. 1.64 (<i>Use of digital technologies to create guest experiences (e.g., for Virtual- and Augmented Reality)</i>)4. 2.34 (<i>Web & app development & programming</i>)
Future necessary level of proficiency in 2030	<hr/> <p>Most necessary:</p> <ol style="list-style-type: none">1. 4.8 (<i>Use of office applications (text processing, spreadsheets, presentation software)</i>)2. 4.79 (<i>Use of digital marketing systems and communication platforms (social media networks, e-mail and direct marketing systems, content management systems)</i>)3. 4.68 (<i>Digital privacy and ethics</i>)4. 4.68 (<i>Secure information processing (backing-up, cybersecurity, data protection)</i>)5. 4.54 (<i>Digital business analysis, business intelligence, data-driven decision making</i>) <hr/>

Skills gaps between existing and future level of skills sets

Least necessary:

1. 3.02 (*Use of robots*)
2. 3.35 (*Use of generative AI applications (e.g. ChatGPT, Midjourney, DALL-E, etc.)*)
3. 3.61 (*Use of digital technologies to create guest experiences (e.g., for Virtual- and Augmented Reality)*)
4. 4.03 (*Web & app development & programming*)

Largest gaps:

1. gap=1.97, gap%=120% (*Use of digital technologies to create guest experiences (e.g., for Virtual- and Augmented Reality)*)
2. gap=1.85, gap%=123% (*Use of generative AI applications (e.g. ChatGPT, Midjourney, DALL-E, etc.) for generating text and visuals.*)
3. gap=1.69, gap%=72% (*Web & app development & programming*)
4. gap=1.67, gap%=124% (*Use of robots*)
5. gap=1.65, gap%=57% (*Digital business analysis, business intelligence, data-driven decision making*)

Smallest gaps:

1. gap=1.01, gap%=27% (*Use of office applications (text processing, spreadsheets, presentation software)*)
 2. gap=1.21, gap%=34% (*Use of digital marketing systems and communication platforms (social media networks, e-mail and direct marketing systems, content management systems)*)
 3. gap=1.24, gap%=36% (*Digital privacy and ethics*)
 4. gap=1.41, gap%=43% (*Secure information processing (backing-up, cybersecurity, data protection)*)
-

Bulgarian respondents consider that employees in their companies currently cope best with digital technologies such as office applications (text processing, spreadsheets, presentation software) and digital marketing systems and communication platforms (social media networks, e-mail and direct marketing systems, content management systems). At the same time, the *Use of generative AI applications* ($m=1.5$), *Use of robots* ($m=1.35$), and *Creating guest experiences with the help of digital technologies* (e.g. AR/VR) ($m=1.64$) are the skills least present in tourism and hospitality companies.

These results regarding the current skills proficiency are not surprising because office applications, social media, email and other similar technologies are actively used by tourism and hospitality employees for work and private purposes, while robots, generative AI, AR/VR and other more sophisticated technologies are yet to find their broader application in the tourism industry in the country. There are only a handful of hotels such as Best Western Premier Sofia Airport (HoReWeek, 2019) and restaurants such as Tyulenovo restaurant (ProNews, Dobrich, 2023) that use robots. Additionally, there are only a few visitor attractions that offer VR experiences to their guests such as the Madara Horseman (Standard News, 2018). Generative AI to create text, images and videos became publicly accessible and affordable only a few months before the data collection, hence it is natural that companies do not have expertise in this field yet (Carvalho & Ivanov, 2023).

In regard to the required future proficiency, the same skills are considered as the most and least important. However, it is noteworthy that the required future proficiency levels are much higher for all skills and the absolute gaps range between 1.01 and 1.97 on a 5-point scale. Hence, respondents acknowledge that the future of tourism will rely on digitalisation and, therefore, their companies will need talent with the respective digital skills.

Unsurprisingly, the smallest absolute and relative gaps between the required future and the current proficiency levels are for the *Use of office applications* (gap=1.01, gap%=27%) and *Use of digital marketing systems and communication platforms* (gap=1.21, gap%=34%) where respondents reported highest current proficiency levels. The largest relative (percentage) gaps are found in the *Use of digital technologies to create guest experiences* (e.g., AR/VR) (gap=1.97, gap%=120%), *Use of robots* (gap=1.67, gap%=124%) and the *Use of generative AI applications* (gap=1.85, gap%=123%) – the skills with the lowest current proficiency level. It is interesting to highlight that respondents acknowledge insufficient current skills about *Digital business analysis, business intelligence, and data-driven decision making* (gap=1.65, gap%=57%) but recognise that these skills will be very important in the future and, therefore, will need training.

3.2. GREEN/ENVIRONMENTAL SKILL SETS

Green Skills

<p>Current existing level of proficiency</p>	<p>Highest:</p> <ol style="list-style-type: none"> 1. 2.98 (<i>Understanding of environmental laws and regulations</i>) 2. 2.92 (<i>Efficient use of resources (e.g., energy, water, materials)</i>) 3. 2.89 (<i>Promotion and encouragement of sustainable practices among guests</i>) 4. 2.6 (<i>Measurement and management of waste</i>) 5. 2.59 (<i>Communication about the organisation's efforts towards a green economy</i>)
	<p>Lowest:</p> <ol style="list-style-type: none"> 1. 2.02 (<i>Green procurement and greening the supply chain (working with green suppliers)</i>) 2. 2.11 (<i>Use of technology to speed up the green transition</i>) 3. 2.22 (<i>Measurement and management of CO2 emissions</i>) 4. 2.31 (<i>Green marketing and product development</i>) 5. 2.37 (<i>Adoption of environmental certifications and management systems</i>)
<p>Future necessary level of proficiency in 2030</p>	<p>Most necessary:</p> <ol style="list-style-type: none"> 1. 4.47 (<i>Promotion and encouragement of sustainable practices among guests</i>) 2. 4.44 (<i>Efficient use of resources (e.g., energy, water, materials)</i>) 3. 4.29 (<i>Understanding of environmental laws and regulations</i>) 4. 4.27 (<i>Communication about the organisation's efforts towards a green economy</i>) 5. 4.24 (<i>Measurement and management of waste</i>)
	<p>Least necessary:</p> <ol style="list-style-type: none"> 1. 3.88 (<i>Green procurement and greening the supply chain (working with green suppliers)</i>) 2. 4.01 (<i>Adoption of environmental certifications and management systems</i>) 3. 4.02 (<i>Green marketing and product development</i>) 4. 4.04 (<i>Measurement and management of CO2 emissions</i>) 5. 4.05 (<i>Use of technology to speed up the green transition</i>)

<p style="text-align: center;">Skills gaps between existing and future level of skills sets</p>	<p>Largest gaps:</p> <ol style="list-style-type: none"> 1. gap=1.94, gap%=92% (<i>Use of technology to speed up the green transition</i>) 2. gap=1.86, gap%=92% (<i>Green procurement and greening the supply chain (working with green suppliers)</i>) 3. gap=1.82, gap%=82% (<i>Measurement and management of CO2 emissions</i>) 4. gap=1.71, gap%=74% (<i>Green marketing and product development</i>) 5. gap=1.68, gap%=65% (<i>Communication about the organisation's efforts towards a green economy</i>)
	<p>Smallest gaps:</p> <ol style="list-style-type: none"> 1. gap=1.31, gap%=44% (<i>Understanding of environmental laws and regulations</i>) 2. gap=1.52, gap%=52% (<i>Efficient use of resources (e.g., energy, water, materials)</i>) 3. gap=1.58, gap%=55% (<i>Promotion and encouragement of sustainable practices among guests</i>) 4. gap=1.64, gap%=63% (<i>Measurement and management of waste</i>) 5. gap=1.64, gap%=69% (<i>Adoption of environmental certifications and management systems</i>)

The empirical results from the survey clearly show that the green skills are the least developed skills in tourism and hospitality companies in Bulgaria – the average current skills proficiency is only 2.50 on a 5-point scale. The best developed green skills relate to *Understanding of environmental laws and regulations* (m=2.98), *Efficient use of resources* (e.g., energy, water, materials) (m=2.92) and *Promotion and encouragement of sustainable practices among guests* (m=2.89). At the same time, the current proficiency level was lowest at *Green procurement and greening the supply chain (working with green suppliers)* (m=2.02), *Use of technology to speed up the green transition* (m=2.11) and *Measurement and management of CO2 emissions* (m=2.22). The reason for this result might be the compulsory nature of environmental legislation and the costs saving effects of the efficient use of resources and the sustainable practices among guests and it was later supported by the results from the qualitative research and by previous studies (Ivanova, Ivanov and Petkova, 2021). Hence, tourism and hospitality managers and owners have legal and financial interests in promoting these skills.

Similar to the digital skills, respondents report that the required future proficiency level of each green skill needs to be much higher than currently. The same three skills [*Understanding of environmental laws and regulations*, *Efficient use of resources* (e.g., energy, water, materials) and *Promotion and encouragement of sustainable practices among guests*] are considered as the most important for the future as well with means 4.47, 4.44 and 4.29, respectively, while *Green procurement and greening the supply chain (working with green suppliers)* (m=3.88) remains as the least important in terms of required future proficiency level. Respondents acknowledge that their current proficiency of green skills is much below the required future proficiency level evidenced by the substantial gaps between them. The three skills with the highest current proficiency level are the skills with the lowest green skills gaps (both in absolute and relative terms), while the three skills with lowest current proficiency level are the skills with the highest green skills gaps (both in absolute and relative terms). In conclusion, the green skills seem underdeveloped in the tourism industry in Bulgaria but respondents recognise their importance in the future.

3.3 SOCIAL AND CULTURAL SKILL SETS

Social-cultural skills

Current existing level of proficiency	<p>Highest:</p> <ol style="list-style-type: none"> 1. 3.96 (<i>Communicate effectively with guests and colleagues</i>) 2. 3.95 (<i>Communicate and interact with people from different cultural and social backgrounds</i>) 3. 3.91 (<i>Provide excellent customer service</i>) 4. 3.82 (<i>Understand the cultural setting of the own destination and share this information with guests</i>) <p>Lowest:</p> <ol style="list-style-type: none"> 1. 3.13 (<i>Communicate effectively with guests in their native language</i>) 2. 3.61 (<i>Support diversity, equality and inclusivity</i>) 3. 3.77 (<i>Resolve conflicts</i>) 4. 3.78 (<i>Adaptability to change and handle unexpected situations</i>) 5. 3.79 (<i>Work effectively in a team</i>)
Future necessary level of proficiency in 2030	<p>Most necessary:</p> <ol style="list-style-type: none"> 1. 4.85 (<i>Communicate effectively with guests and colleagues</i>) 2. 4.83 (<i>Provide excellent customer service</i>) 3. 4.82 (<i>Work effectively in a team</i>) 4. 4.82 (<i>Resolve conflicts</i>) 5. 4.81 (<i>Communicate and interact with people from different cultural and social backgrounds</i>) <p>Least necessary:</p> <ol style="list-style-type: none"> 1. 4.34 (<i>Communicate effectively with guests in their native language</i>) 2. 4.53 (<i>Support diversity, equality and inclusivity</i>) 3. 4.74 (<i>Understand the cultural setting of the own destination and share this information with guests</i>) 4. 4.8 (<i>Adaptability to change and handle unexpected situations</i>)
Skills gaps between existing and future level of skills sets	<p>Largest gaps:</p> <ol style="list-style-type: none"> 1. gap=1.21, gap%=39% (<i>Communicate effectively with guests in their native language</i>) 2. gap=1.05, gap%=28% (<i>Resolve conflicts</i>) 3. gap=1.03, gap%=27% (<i>Work effectively in a team</i>) 4. gap=1.02, gap%=27% (<i>Adaptability to change and handle unexpected situations</i>)

Smallest gaps:

1. gap=0.86, gap%=22% (*Communicate and interact with people from different cultural and social backgrounds*)

2. gap=0.89, gap%=22% (*Communicate effectively with guests and colleagues*)

3. gap=0.92, gap%=24% (*Understand the cultural setting of the own destination and share this information with guests*)

4. gap=0.92, gap%=24% (*Provide excellent customer service*)

5. gap=0.92, gap%=25% (*Support diversity, equality and inclusivity*)

The social-cultural skills are the ones that seem best developed in tourism and hospitality companies. Their average reported current proficiency level is much higher compared to the green and digital skills. The reason might be the fact that tourism is perceived as a 'people's business' (Ivanov & Webster, 2019); hence, social-cultural skills related to interacting with other people (customers, employees, colleagues) are of crucial importance. Therefore, unsurprisingly, the highest current proficiency level is reported for the skills related to *Effective communication with guests and colleagues* (m=3.96) and the *Ability to communicate and interact with people from different cultural and social backgrounds* (m=3.95). The diversity of tourists visiting Bulgaria (National Statistical Institute, 2023b) and the wide variety of the languages they speak might explain the ability to communicate effectively with guests in their native language is considered as the least developed skill in tourism and hospitality companies. Usually, hotels and restaurants in the country can provide information and menus in Bulgarian and English, while service in other languages (e.g. Russian, German, French, Romanian, Hebrew, Polish, etc.) is also offered depending on the target market segments of the companies.

Looking at the required future proficiency levels of the social-cultural skills we see that again the scores are much higher compared to the green and digital skills (4.73 on average on a 5-point scale). Therefore, respondents consider that the social-cultural skills will continue to be the most important for their companies in the future as well. Moreover, most of the skills are considered as nearly equally important – as the table shows the required future proficiency levels of the top 6 social-cultural skills are within 0.06 points on a 5-point scale. Consequently, the absolute and relative gaps are also very close ranging from 0.86 (22%) for the skills to *Communicate and interact with people from different cultural and social backgrounds* and 1.21 (39%) for *Communicating effectively with guests in their native language*.

4. EXPERT INTERVIEW

RESULTS

In this chapter, the results are provided of the semi-structured interviews that have been conducted with experts in tourism in BULGARIA. With these interviews, we were seeking more detailed knowledge and fresh insights regarding trends in tourism, in tourism employment and in the development of Digital, Green, Social and Cultural skills in tourism. Semi-structured interviews are an appropriate tool for this purpose, since they allow for new understandings and thoughts to surface during such interviews, which further facilitate participants' responses and elaborations.

In total, 22 interviews have been held, featuring respondents from the five tourism subsectors: travel agents/tour operators, destination management organisations, visitor attractions, accommodation providers and food & beverage providers (Table 1). Interviewees were senior managers; company owners; entrepreneurs; heads of department. The enterprises range from micro/family-owned ones and SMEs to larger hotel chains with more than 150 employees.

Distribution of respondents by subsector	Frequency	Percentage
Accommodation provider	8	36,36
Visitor attraction	3	13,64
TO/travel agency	3	13,64
F&B	3	13,64
DMO	2	9,09
Events	1	4,55
Rent-a-car	1	4,55
Mixed (visitor attraction + accommodation)	1	4,55
TOTAL	22	100,00

4.1 THE FUTURE OF TOURISM AND TOURISM EMPLOYMENT

4.1.1 INTRODUCTION

Several societal megatrends - already visible today but with their full impact still unknown - are heavily influencing the future of tourism. Demographic developments - the continued growth of the global middle class, increasingly elderly tourists, digital natives coming of age and entering the travel market, more Asian tourists - will result in additional and diverse tourist preferences and choices. Technological innovations (AI, robotization, virtual and augmented reality, etc.) will continue to impact tourism and transform business models, jobs in tourism and tourist experiences. Social developments (Covid and health issues, migration, economic uncertainty, uproar and wars) will also have their impact on tourism. The inclusion of more sustainable practices is also a widely debated topic in the consumption, production, and development of tourism.

Looking at developments in employment, the tourism and hospitality sector has special characteristics: e.g., working on weekends and holidays, multiple shifts, seasonal work, etc. These atypical forms of employment include a variety of work contracts (e.g., temporary work, part-time work, temporary agency work and other multi-party employment arrangements). In order to keep pace with all these developments, the tourism sector needs to be prepared for these changes: to transform the tasks expected by employers into new jobs, thereby making the jobs attractive to future employees and offer them career perspectives.

In this section, we aim to get an overall understanding of the interview participants' ideas of the evolution of the tourism sector, tourism employment and the emergence of new job profiles – in tourism in general and specifically in relation to the own organisation, in about seven years' time.

Questions that have been discussed with participants were the following:

- What will the sector and your organisation and the sector look like around 2030? Which new changes do you perceive could occur in your business?
- What impact do the current megatrends and crises (Covid-19 / health; Ukraine War; migration; demographics; environment and climate; energy; cost-of-living) have on employment in your organisation and how does your organisation deal with the consequences of these crises?
- What kind of people will be working in your organisation around 2030? Will there be a significant increase/decrease in the number of employees? And if so, how are these employees different from your current workers?
- How is your organisation changing the tasks that will be required into new job profiles?
- The above-mentioned developments have also transformed the way people work. New concepts such as working from home (WFH); digital nomads; hybrid working; workations; remote working; etc. have emerged or intensified. Which work forms are you now experiencing in your organisation and what effect does this have on recruiting new personnel?
- How does your organisation deal with societal developments such as diversity, inclusion, and flexibility within the recruitment process?
- Which new job profiles do you see emerging in your organisation in the next seven years (2030) and why? Which new job positions will emerge and/or will be 'copied' from other sectors?

4.1.2 RESULTS FROM THE INTERVIEWS

The majority of respondents share the opinion that despite the crises, tourism will continue to develop and will remain one of the most important sectors in the economy.

The successful company of the future

Changes in the sector

Most of the respondents consider significant changes in their sectors, addressing the demographic crisis and changes in the environment. Surprisingly, a large share of the respondents (mostly dealing with F&B and Visitor Attractions) do not envision too large transformations in their sector – they think that the changes will affect primarily large and macro companies, whereas micro and small establishments will not be affected at all. The findings outline several main aspects that will continue to be of key importance for the success of tourism companies.

New technologies

The development and application of new technologies is the most pronounced trend, indicated by the largest number of respondents. The sustainable companies of the future are described as “the ones that invest heavily in technology platforms creating more seamless and personalized guest experiences, while unlocking new revenue opportunities for their owners” (vice general manager, international hotel chain).

To a large extent, new technologies are introduced to meet evolving customer needs. Examples in the hotel business include the latest hybrid meeting technologies, high-tech equipment in guest rooms, meeting and event halls and common areas, digital platforms for customer feedback, electronic information and advertising boards instead of paper brochures and posters.

Some respondents believe that post-COVID, the tourism business will develop in a hybrid way. Live travel will continue, but at the same time people are

getting busier, there are also people who do not have the opportunity to travel, which gives a boost to virtual travel. The trend towards hybrid forms will continue, which will impose new requirements on service design.

In general, the forecasts point to an increasing digitization and transfer of most activities (especially in the travel agency business) online, since, unlike previous generations, young people feel confident in an online environment and do not find face-to-face communication that important. At the same time, some respondents believe personal contact will continue to be of paramount importance in tourism and are quite sceptical about the application of robotics and automation in tourism, believing that it will be limited mainly to large complexes.

However, all of the respondents explicitly point out the considerable importance of the human factor in hospitality and tourism, especially in the direct interactions with the clients.

Digital marketing

Companies that are well represented online are considered forward-thinking and successful, and this trend will intensify in the future, with digital marketing and optimization of online sales channels gaining fast-growing importance. Online reviews will continue to be a decisive factor in shaping customer decisions and the ability to handle large databases will be increasingly in demand.

Corporate social responsibility

Environmental protection, which is one of the main dimensions of corporate social responsibility (Dahlsrud, 2008), is already among the main priorities of the EU, and this trend will deepen. The results of the interviews indicate that in order to be successful in the future, businesses need to be sustainable and prioritize environmental protection – reducing carbon emissions, rational use of electricity and water, and minimal use of plastic. Most of the large hotels are

already planning to replace the electrical and HVAC (Heating, Venting, and Air Conditioning) systems with energy-efficient ones, install water-saving showers, switch to wooden cards, and install charging stations for electric cars.

Some of the respondents also indicate a commitment of their company to enhancing the well-being of the local community, mainly through involving themselves in social causes and charity initiatives.

Last but not least, corporate social responsibility is also linked to how organisations interact with stakeholders, including employees (Dahlsrud, 2008). Most respondents stated that the well-being of their employees was of primary importance. The following paragraph is exemplary of this attitude:

Employee well-being is a valuable tool for establishing meaningful relationships in the workplace as well as improving business performance. Driven by the belief that happy employees are more engaged and productive, we prioritize the overall well-being of our employees. Through continuous action in this direction, we strive to understand the needs of employees and improve their well-being. We regularly send out surveys, with which we aim to understand what problems our team is facing and to solve them.

(HR expert, rent-a-car company)

Pro-active and adaptive

Given the huge dynamics in the sector and the rapid development of technology, according to some respondents, “only companies with strong values and priorities, which are adaptable, focused on the well-being of both their customers and employees, and which are continuously looking for ways to improve and expand their services” (Vice general manager, international hotel chain) will succeed.

Tourism employment: challenges and prospects

The turbulent development of technologies, the increasing rate of digitization,

number of challenges to tourism personnel as well. The next few paragraphs summarize respondents' views on the skills that will be most important in the next 7 years.

Digital skills

Given the ever-faster uptake of new technologies, it's no surprise that digital skills are cited as an important requirement for staff both now and in the future. As one of the respondents points out,

The new skills will be mostly related to digitalization and the use of different technologies, at all stages of the relationship with the guest - from receiving the inquiry to following their departure. Digitization will play an increasingly important role in determining business success and sustainability.

(Owner, family guest house)

Presentation and interpretation

In addition to digital skills, a number of respondents also emphasize the ability to adequately present the product and, especially in the field of cultural tourism, for tourist interpretation. Proper interpretation facilitates the creation of a memorable experience, and these skills are especially important when dealing with diverse audiences. According to one of the respondents, reaching some of these audiences will likely require not only the acquisition of new, specific skills, but also the need for additional experts, for example in the same age group, to be able to adequately “translate” the message. In the case of museums, pedagogical skills are even mentioned, one of the reasons being that the museum also has an educational function and they mainly work with young student groups. In this regard, a trend towards multidisciplinary development of employees and increasingly pronounced competition with popular media channels – television, internet, etc., is indicated, so that the younger audience can be attracted and retained.

Foreign languages

Foreign language competence has always been of primary importance in

tourism, and in the respondents' opinion, this will continue to be so in the future.

Creating memorable tourism experiences

For at least a decade now, it has been widely accepted in tourism that successful companies are those that sell memorable experiences, rather than products. In this sense, it is not surprising that some respondents point to a growing role of the ability to design and manage compelling tourist experiences.

Creativity

This seems to be especially important for tourism attractions (in this case – museums), which to some extent lag behind the leaders in the world and Europe and need to cope with increasing competition and the demand for more personalized experiences. As one of the respondents points out, apart from being motivated and responsible in the performance of their current duties, "employees should not spare their creativity".

Professional expertise

The importance of extensive expertise and knowledge has been discussed by respondents in two main directions. On the one hand, the importance of tourism resources has been emphasized, and hence - the need for experts in the field of biodiversity and cultural heritage. On the other hand, in the case of travel agencies – the ability to provide the customer with comprehensive and systematized information that they would not get by themselves by browsing the Internet:

*People who know languages actively take advantage of free city tours. Therefore, employees need to provide additional information and practical advice that is not easily found on the Internet - in which exchange office the exchange rates are the most advantageous, what is the climate in the destination, etc. It is good for the employees to be profiled for specific destinations so that the customer can be more confident in their choice.
(Tour leader, travel agency)*

A change in staff number

The majority of respondents foresee a reduction in the number of staff in the future - mainly due to the introduction of new technologies that replace part of the workforce. This is also seen as a way to overcome the difficulties in hiring well-trained and motivated staff:

Digitization of processes will lead to a reduction in the number of employees in the company. More and more we will begin to replace the human factor with a machine, as unfortunately I increasingly encounter young people without the desire to achieve high professional competence.

(HR expert, rent-a-car company)

However, it is also believed that in tourism this reduction will not be drastic, since, due to the specifics of the sector, the importance of personal contact will continue to be high. The opinion of both hoteliers and restaurateurs, and tour operators (with few exceptions) is that tourists will continue to demand a personal, friendly attitude and will make their purchase decisions based on this. Forecasts of reduction in the number of personnel refer mainly to larger companies, while small and especially family businesses tend not to foresee such changes.

Challenges

Despite the predominantly optimistic forecasts for the development of tourism in general and the specific companies participating in the study, there are no shortage of challenges either.

Insufficient support from the state

A number of respondents report that they do not receive sufficient support from state and municipal institutions, and this is mainly observed in public enterprises (for example, museums). The main problems relate to insufficient funding, lack of an overall vision and development strategy at the state level. In the case of private companies, complaints relate to poorly maintained infrastructure, lack of control and redevelopment, insufficient care for preservation of cultural heritage.

New positions foreseen

In line with the trend towards the introduction of new technologies and the corresponding increased demand for digital skills, some respondents believe that in the future there will be a need for introducing completely new positions related to this. However, they cannot specify exactly what they will be, with some of the assumptions being specialists who create digital content, system administrators, programmers.

The increasing importance of creating memorable tourist experiences leads some respondents to believe that this requires the introduction of specific positions, where the employee will monitor the overall experience, the relationship with the guest, customer satisfaction, and will perform quality control.

At some restaurants, a new position related to nutrition may arise due to the increasing demands of customers for specific diets, allergen avoidance and the overall trend for healthy food.

In cultural attractions (in this case museums), the need for cultural heritage interpretation skills was emphasized. One of the respondents believes that it is possible that a similar position will be established in the future.

Merging existing positions

One of the widely commented trends was the merger of already existing positions, to which automation will contribute in the future. In some cases, it is a matter of consolidating back-end positions, and in others, it is about taking administrative staff out of the offices, so that there is direct contact with customers.

Staff recruitment

The other main concern shared by a large proportion of respondents is the recruitment of quality staff. In addition to labour shortage, which necessitates the importation of personnel from abroad, concerns are also related to the skills of newly hired employees.

A large share of respondents reported lack of motivation, reluctance to self-actualisation and a lower level of general knowledge. One of the solutions some companies have adopted is extensive in-house training, coupled with mentorship by senior employees.

Current and prospective customers

Diversity of target groups

Given the variety of companies that the respondents represent, the profile of their customers is also quite different. Museum institutions are mainly aimed at young audiences and people of the third age, but with intentions to expand their audience. One of the travel agencies works predominantly with elderly people, as they have more difficulty in organizing their trips on their own. This respondent does not foresee any changes - neither in the profile of their customers nor in the required skills of the employees. Another travel agency, however, believes that their focus should be on customers with greater financial capabilities, who can speak foreign languages and for whom it is a priority to be informed and learn new things about the destination they are visiting. According to the respondent, the most important factor for such customers is not the price, but the extensive knowledge and professional expertise of the employees.

Digitally-savvy, but seeking personal communication

The COVID-19 pandemic has taken its toll on travel consumers – both in terms of greater health concerns and hence a search for healthier travel options, and an increased desire for personal face-to-face contact. At the same time, as one of the respondents noted, this is coupled with increased use of digital devices and technologies:

In recent years, especially after the pandemic, our guests have changed a lot and I believe they will continue to change. Starting with the fact that they pay much more attention to their health and work/life balance, after months in isolation they have become more sensitive and seek human contact, but at the same time the Internet and digital devices are a

mandatory part of their daily lives and cannot imagine life offline. They know that in seconds they can be transported anywhere in the world, albeit virtually, and contact relatives, friends and colleagues at any time of the day, and at the same time they are looking for a professional but friendly attitude, they want to be perceived as people, not as room numbers.

(Vice general manager, international hotel chain)

More virtual tourists in prospect

The pandemic also gave rise to various forms of virtual tourism – from virtual wine tastings to virtual tour guiding and augmented reality. This is a trend some respondents expect to intensify in the future (especially among elderly people), raising new challenges to the skills and competences required. It is also cited as one of the future job profiles in some sectors (e.g. travel agencies and visitor attractions).

There is, however, a considerable share of respondents (about one-third) who believe that there will be no significant changes in the profile of their customers.

Impact of the crises

For most companies, the recent crises - the pandemics, the war in Ukraine and inflation - had a negative impact. The impact on the workforce was the most pronounced one – some companies had to lay off part of the staff and it was difficult to get them back afterwards. Another part managed to keep it, but at the cost of a lot of effort. The war in Ukraine also affected the occupancy of some hotels, with an outflow observed. There are, however, three respondents who reported that the crises had no impact on them.

From the positive side, COVID showed a number of more efficient ways to work. The majority of the respondents confess that some of their employees still apply hybrid working when necessary. Also, in many companies several different job tasks are performed by 1 employee, e.g. instead of 2-3 animators, assistant and a manager, nowadays they are 2-3 persons maximum. A hotel

manager employed 1 person to be both at the Reception desk and serve in the Lobby bar. For two neighbouring restaurants, previously, there were 2 kitchens, and now the 2 restaurants share 1 kitchen – more efficient, less expensive. Therefore, most of the managers are looking for younger employees who would be able to take over multiple tasks, and to be trained from the scratch.

Another, though not so common, effect was having to work from a distance. Even after the end of the pandemics, there is a tendency for an increased desire among employees to work from home, which, however, is almost impossible in the field of hotels, restaurants and tour operators. In addition, one of the respondents (director of a museum) reports lower efficiency of working at home and its perception by employees as a "holiday". Still, flexible working time might be appropriate for other sectors, but not for the tourism, which is strongly connected to seasonality and climate conditions.

<i>Possible new job profiles by sector</i>	
Destination management organisations:	Online platforms supporter; Data collector; Programmer
Accommodation providers:	Digital technologies specialist; Psychologist to care for the mental health of the guests; Data collector; Ecologist/Working for more sustainable operations
Food & Beverage:	Dietitian and Nutriologist to deal with allergies; Decorator of buffet
Visitor attractions:	Virtual guides; Educators with pedagogical approach to work with kids in the museums; Technicians to work with the new technologies
Travel agents and tour operators:	Cultural tourism tools – animators, actors, AR & VR reality implementers; Programmers

4.2 DIGITAL SKILLS

4.2.1 INTRODUCTION

Technological innovations will continue to impact tourism and change business models, jobs in tourism and tourist experiences. This section focuses on digital skills for the future. These are defined as skills related to working with computers, software, digital equipment, internet, online safety. This comprises not only Microsoft Office skills, skills for implementing online safety procedures or skills to adjust digital equipment such as Wi-Fi connectivity, sound systems and video equipment but also desktop publishing skills, computer programming skills, website development skills, social media skills, skills to monitor online reviews, data analytics, business intelligence, big data skills, AI and robotic skills (ChatGPT, Dall-E) and skills related to applying digital hardware technologies such as AR and VR.

This section provides an overview of digital skills that the interview participants rate as the most important in about seven years' time.

Questions that have been discussed with participants were the following:

- Which digital skills are important in your company today?
- Which digital skills are currently lacking in your company?
- How important will these skills be around 2030? Which ones will be most important?
- Which other digital skills can you think of that will be vital for the future?
- Which changes do you anticipate will be necessary within your organisation regarding digital skills (2030)?
- Does your company provide training or education for these skills? If so: what kind of training; if not: why not?
- Do you use an external organisation to help train your staff in digital skills? If so: which ones and what kind of training do they provide?
- What would be the most effective training method in digital skill development for your employees?

4.2.2 RESULTS FROM THE INTERVIEWS

Almost all respondents are convinced of the growing role of digital skills globally, although there is no lack of doubt as to what extent this will affect the individual company, especially in smaller enterprises. However, it is widely believed that in 10 years' time, digital skills will be increasingly important as there is already a trend towards automation and almost all operations and activities are being carried out online. One of the most tangible areas of digitization is in reservations – one respondent indicated that 70% of all reservations are made online by the customers themselves.

Skills for working with new and emerging technologies will become an increasingly important requirement in the selection of new employees. As one respondent noted, even now, a candidate is often chosen because of their digital skills, even though they may not meet the educational requirements. Digitization in the field of tourism is also important because it facilitates the relationship with customers, as well as their access to information about the product and its eventual purchase. On the other hand, it facilitates to some extent the communication between different departments in a given company.

However, there are also respondents who do not share this opinion and believe that digital skills will not become more important in the future:

The younger generation spends a lot of time with electronic devices, so I think that digital skills in 10 years will not be special. Digitization is developing at such a pace that devices and programs in the future will be usable by every person without additional training. For this reason, and because of the lack of staff, I believe that in the future employees will not need more specialized digital skills. When hiring people, I focus mostly on their personal qualities and potential.

(General manager, hotel)

Important digital skills

Digital marketing, social media management and website maintenance

Social media management and digital marketing were the digital skills most frequently mentioned by respondents. In the case of larger companies, employees who have special education and are specialized in this are hired, while in smaller companies these activities are combined with others. It is widely believed that these skills will become increasingly important in the future. An essential part of the digital skills related to social networks and website maintenance is content creation - both in text and graphic/video form.

AI and robotization

Along with social network management skills, the other most frequently mentioned trend with regard to new technologies is automation/robotics and artificial intelligence.

One of the sectors, which is noticeably pervaded by automation is the Food & Beverage one, and especially the kitchen. While personal contact is still preferred for waiter service, a number of respondents have either already introduced or are planning to introduce a large degree of automation in the kitchen area. Predictions about automation in the kitchen, however, is that it will not be carried out by robots, but rather by specialized machines that will require appropriately trained personnel. On the other hand, not all respondents expect that there will be a need for digital skills, even when introducing a robotic kitchen, because *“machines are becoming not more complex, but easier to use and require less time to learn”*. (F&B manager, hotel)

There are also respondents who completely reject the idea of robotization, despite the many benefits, emphasizing the role of the human factor: *“I don't imagine robots in our company, there are many positives, but we are not supporters as managers. Tourism is by people for people. Service and personal contact are required.”* (Manager, visitor attraction)

Virtual and augmented reality

Cultural heritage institutions and tourist attractions were the first to adopt virtual and augmented reality, but a number of respondents from other sectors (hospitality, events) predicted a recent entry of these technologies into their field as well.

Data analytics

Skills in applying the various data analysis tools are of utmost importance in making informed decisions. Lack of such skills is mainly reported by smaller businesses and is often related to the inability to monitor consumer behaviour or website performance. Handling big data has also been mentioned as an important skill.

Mobile technologies, smart devices and Internet of things

Smart devices are increasingly entering the field of tourism, especially in the hotel and restaurant sector and for this purpose employees will have to be more adaptable and acquire certain skills. Several respondents claimed that in the future desktop computers will be completely replaced by small smart devices. The trend for switching to mobile devices is particularly visible in the restaurant subsector:

At the moment, in the restaurant, we work with the so-called pocket system, which is a mobile application on the phone of every waiter. Nowadays, it is extremely important for an employee to be computer literate to the extent that they can handle mobile devices. This applies not only to our establishment, but also to all others.

(Manager, restaurant)

Sector-specific software

The interviewees also mentioned the need to handle several types of software that are widely used in the tourism industry. Proficiency in using *online booking platforms and reservation systems* is vital for hotels, airlines, tour operators, and other tourism-related businesses. Being able to manage and optimize these systems ensures smooth customer experiences.

Proficiency in *Customer Relationship Management systems* enables businesses to manage customer interactions, track preferences, and offer personalized services, enhancing customer satisfaction and loyalty.

For larger companies, the use of *Property Management Systems* greatly facilitates ongoing operations and day-to-day management. Although not many in number, there are respondents who emphasize the need for skills to work with this type of software.

In some museums, due to the more specific activities, proficiency in specialized software such as AutoCad or ArchiCad is also required for the archaeologists.

Digital security

Implementing online safety procedures are also among the digital skills mentioned by some respondents.

Computer programming

A small number of respondents also indicate a need for a specialist in programming.

Adjusting digital equipment

The skill to handle digital devices (Wi-Fi router, sound and video systems) was also listed as an important skill in the sphere of tourism.

Virtual tour guiding

The digitization of tourism has given rise to virtual forms of tourism, which consequently will quite probably lead to the need of virtual tour guiding skills.

Basic Digital skills

Last but not least, there is a need for basic digital skills such as working with the Microsoft office suite, and this usually refers to the lower job positions.

Trainings for digital skills

A large share of the interviewed companies carries out trainings on digital skills. Those that offer external and internal training are almost equally divided, and a considerable number (mostly small enterprises) rely on self-training. External trainings are mainly provided by software companies, whose product has been purchased by the respective hotel/restaurant/travel agency.

There are different preferences regarding the most effective way of learning. The majority of respondents indicated on-site, face-to-face training during working hours. Others emphasize the importance of small groups. There is only one respondent who considers online training to be more appropriate, because it is faster and more accessible.

4.3 ENVIRONMENTAL/GREEN SKILLS

4.3.1 INTRODUCTION

In the secondary data section of this report, it was demonstrated that green skills comprise more than skills for reducing the impact of tourism on the environment (minimise the use and maximise the efficiency of energy and water consumption; manage waste, sewage, recycling, and composting; conservation of biodiversity; knowledge of climate change). They also involve developing and promoting sustainable forms of transport and tourism in (rural) areas as an option to diversify local economies, create economic growth and decent jobs for local people (including women and youth) as well as conserve local natural and cultural heritage. On the other hand, managing and reducing the impact of overtourism is also a part of sustainable tourism.

The results of this section provide an overview of environmental management skills that the interview participants rate as the most important in seven years' time.

Questions that have been discussed with participants were the following:

- What would you consider green / environmental management skills?
- How important will these skills be around 2030? Which ones will be most important?
- Which green/environmental management skills are important in your organisation today?
- Do you expect any changes regarding the necessity of staff with green skills in your organisation between today and 2030? If so, which changes? If not, why not?
- Does your company provide training or education for these skills? If so: what kind of training; if not: why not?
- Do you use an external organisation to help train your staff in green/environmental management skills? If so: which one and what kind of training does it provide?
- What is your opinion on green certification/awards / eco-labels? Are you a member of one of these? Why? What are the benefits for you? If not, why not?

4.3.2 RESULTS FROM THE INTERVIEWS

According to the majority of interviewees, green skills are of great importance now and will continue to receive increasing attention, and in 10 years environmental protection measures will be even more important. Most airlines will switch to greener solutions, mostly because of European legislation, and hotel certification will be absolutely mandatory, not recommended, as it is at the moment. For some respondents, protecting the environment is of utmost importance, as they believe that „sustainability is a journey to a better future“ (vice general manager, international hotel chain). At the same time, others, while recognizing the importance of green skills, say that they are not currently relevant for their company, because there are other, more pressing issues.

Overall, there is a widely shared opinion that environmental protection is rather a matter of individual attitudes/mindset rather than a matter of acquiring green skills. The importance of guests' attitude is also emphasized - if they are not actively involved, the company's efforts would be in vain. In this sense, an important skill would be the ability to engage your customers in the systematic implementation of green practices. On their site, some respondents have promotional materials and brochures that explain to the guest how to be more responsible, for example not throwing towels on the ground, to limit washing and detergent use, how to reduce the water used in the bathrooms, etc., thereby trying to change the way of thinking not only of the employees, but also of the guests.

Other respondents emphasise the leading role of the municipal/state authorities:

These activities are to some extent in municipal, regional and state institutions, which will build the protocol for the use of such objects, a way of movement. It is important not to overload and limit the number of visitors to a given site. We must train the municipalities and NGOs on how to work so that eco-friendly tourism can be made so that with entrance fees, the collected money can be used to restore and protect the natural environment.

(Owner, event management)

Important green skills

Waste management

This is the most frequently mentioned aspect of environmental practices. Separate collection of waste is mentioned, and some respondents emphasize that for them environmental protection is more important than the higher costs it entails. In general, staff have no problems acquiring these skills. Wastewater management has been cited as a problem that has not been solved yet.

Resource-efficiency

Minimizing energy and water is discussed almost on a par with waste management. Again, respondents describe the practices that companies employ rather than the skills required by staff. Commitments to building a "green" hotel include implementing aerated showers and low-flow faucets, LED lighting, solar panels and electric vehicle charging stations. Other initiatives include eliminating single-use plastic key cards and straws and limiting printed materials, in addition to introducing a large-pack/dispenser towel and bath towel reuse program.

Like the previous one, this is a skill that is primarily required of management staff who have the authority to implement sustainable practices.

Sustainable tourism

The third most mentioned aspect is sustainable tourism with an emphasis on the preservation of cultural and natural heritage. The skills required are related to the introduction of sustainable and eco-friendly forms of transport or tourist activities, management of overtourism, development of specialized routes related to the environment. Examples include eco-trails, rural tourism, and in a broader sense - wine tourism and local cuisine.

Supporting local communities

Only a few respondents mention initiatives and practices in support of local communities. Unfortunately, this dimension of green practices is still widely neglected.

Training in green skills

The majority of respondents conduct internal trainings for compliance with the company's environmental standards, and these can take different forms: online, periodic newsletters, "reminder" posters for office spaces, instructions on a regular basis.

External trainings are extremely rare, with only one respondent reporting any, and these were provided free of charge by non-governmental organizations. Regarding the preferred form for external trainings, face-to-face, after-hours trainings are mentioned. In terms of content, exposure to best practices is considered particularly useful.

4.4 SOCIAL-CULTURAL SKILLS

4.4.1 INTRODUCTION

Social/cultural skills can be divided into personal skills, communication/cultural skills, and diversity skills. These skills are related to behavioural and practical attitudinal competencies in teamwork, interpersonal communication, cross-cultural understanding, and customer service orientation. Particularly related to working in the tourism sector are competences towards managing personal relationships, understanding the needs and feelings of others, cooperating with others, showing a positive attitude, showing respect, making appropriate contact and active listening. Furthermore, social/cultural skills deal with competencies that promote social progress which recognizes the needs of everyone; accessible tourism provision for those with disabilities; gender equality. These skills are expected to be of major importance for the tourism sector, to match the needs of a “high tech” society with “the human touch” needed in personal and human interactions in the tourism sector.

This section provides an overview of the social/cultural skills (i.e., personal-, communication/cultural-, and diversity skills) that the interview participants rate as the most important in seven years' time.

Questions that have been discussed with participants were the following:

- What do you consider the most relevant and important social and cultural skills for people working in the tourism sector?
- How important will these skills be around 2030? Which ones will be most important?
- Can you think of more or other social/cultural skills that might be important around 2030?
- What changes do you expect for your organisation with regard to necessary social/cultural skills in the future (2030) compared to today?
- Does your company provide training or education for these social/cultural skills? If so: which ones; if not: why not?

- Do you use an external organisation to help train your staff in social/cultural skills? If so, which ones and what kind of training do they provide?
- What would be the most effective training method in social/cultural skill development for employees?

4.4.2 RESULTS FROM THE INTERVIEWS

Social skills are considered extremely important and this will not change in the future; some respondents argue these are actually the most important skills for tourism:

Digitization and the availability of well-trained employees to work with it will provide many opportunities. However, the emotional element of tourism will never disappear. The human factor is of utmost importance in tourism and will not be displaced by new technologies.

(Tour leader, travel agency)

Important social skills

Interpersonal (communication) skills

The ability to effectively communicate with both customers and team members is the most frequently mentioned social skill. It is associated with active listening, observation, competences for working with different types of consumers:

The ability to communicate and TAKE CARE for the tourist will be essential for the business. That was the most important thing when we started, and it will continue to be, because this business is like that. You create an experience, and this happens through the ability to understand and communicate with people, to cheer them up, to talk, to ask them something. And here, of course, comes language knowledge for working with different nationalities, but even if you don't have much language knowledge, there is a way if you wish, as long as you have the ability to approach the person positively.

(Maintenance specialist, Visitor attraction)

Responding to online reviews is another aspect of interpersonal communication, which unites digital and social skills.

Understanding the needs of other people

Understanding customer needs is the second most discussed socio-cultural skill. It is considered key to achieving a high degree of satisfaction by providing the features that meet individual requirements. Being aware of cultural differences is strongly related with this competence:

Before, we mainly worked with the Russian market, now we are with the Romanian one. Cultural differences are not many, but differences do exist. It makes a huge difference whether you serve a Brit, a German or a Russian. The staff must be able to serve each and every guest in the way the guest expects.

(F&B manager, hotel)

Inclusivity, diversity, and equality

Understanding and respecting foreign cultures and religions, being tolerant of differences (gender, religious, cultural) and people with special needs is of great importance in tourism. Respondents indicate that these skills are important now, they will be important in the future. This tolerance is required not only towards customers, but also towards other team members.

Team work

Teamwork is important in any sector and tourism is no exception. A large number of respondents confirm this, indicating the great importance of this skill for the successful operation of their company.

Positive attitude, kind and attentive behaviour

A positive attitude is also among the skills considered particularly important in tourism. Several respondents also indicated the importance of the staff expressing hospitality, being kind and responsive to the client's needs.

Handling stressful/critical situations

Working in tourism is extremely dynamic and often puts employees in tense situations that require a quick and adequate response. It is hence not surprising that the ability to work under stress is among the top five most frequently commented social skills in interviews.

Entrepreneurial skills

One of the respondents points out that one of the skills that will probably be very important in the future is the entrepreneurial skill, or as one of the respondents defines it: “the ability to recognize opportunities for business development and to apply them at the right time” (owner, family guest house). Creativity and the ability to apply innovations are also skills related to the entrepreneurial flair.

Self-actualization

Self-actualization, or in other words, being able to learn and to self-train is also discussed as one of skills of the future.

Missing social skills

The social skills group was the only one where respondents indicated skills that they felt were lacking in their company.

Interpersonal communication

Some respondents reported a lack of proper behaviour skills as far as the staff-customers communication is concerned. The lack of communication skills seems to be more often observed among 25-26-year olds. As one of the interviewees pointed out, “They don't seem to understand that the tourist needs to feel understood and respected, and they don't have the skills and approach to make the tourist feel good.” (maintenance specialist, tourist attraction).

Lack of sufficient skills for presenting the company products have also been reported.

Team work

There are also isolated cases where communication problems between team members are reported and team working skills need improvement.

Training in social and cultural skills

Internal trainings are far more popular than external ones and are usually conducted in the form of introductory and periodic training, mentoring, team building. Some businesses also use external lecturers, and the micro and small enterprises mainly rely on self-training. There is a lot of scepticism about external training in general - it is believed that it would be irrelevant and ineffective. In the few cases where willingness is expressed, preferences are directed towards hands-on, face-to-face, off-the-job training with demonstration of good practice.

4.5 SUMMARY OF THE SKILLS PROFILE

The results of the interviews show that all three types of skills - digital, green and social - are important in the field of tourism and will continue to be so in the future. While the need for digital skills is largely driven by the need to remain competitive in a rapidly changing environment, environmental (green) skills appear to be more driven by institutional, national and European requirements and restrictions. This is also the topic where respondents were most hesitant about exactly what skills are lacking or needed. The need for social skills is at the core of tourism, and it is no coincidence that a number of respondents insist that these are the most important skills in this field.

Different sectors have their own characteristics in terms of the skills that their employees should possess in order for the company to be competitive and to meet the needs of its customers to the fullest extent. Table 3 summarizes the skills identified through the interviews, noting that there are some differences depending on the size of the company and the sector in which it operates.

<i>Skills considered important by interviewees</i>		
Digital skills	Green skills	Social and cultural skills
Digital marketing and online communication	Waste management	Interpersonal (communication) skills
AI and robotics	Resource-efficiency	Understanding the needs of others
Virtual and augmented reality	Sustainable tourism practices	Inclusivity, diversity, accessibility
Data analytics, including big data	Supporting local communities	Teamworking
Mobile technologies, smart devices and IoT		Positive attitude, kind and attentive behaviour
Sector-specific software (CMS, PMS, online booking software)		Handling stressful/critical situations
Digital security		Entrepreneurial skills
Computer programming		Self-actualisation
Virtual tour guiding		Creativity
Adjusting digital equipment		Interpretation of cultural and natural heritage

5. BEST PRACTICES

UPSKILLING AND RESKILLING

In each country that is represented in the PANTOUR consortium, partners have each selected, analysed and interviewed **5 best practices** in upskilling, reskilling, attracting/retaining staff in the five tourism sub sectors. The goal of the analysis is to have an inventory of innovative initiatives, projects, programs, philosophies, tools, methods, ideas, solutions, and concepts in relation to upskilling, reskilling, attracting, and retaining staff in order to improve the knowledge on digital, social, and green skills development in tourism.

In short, a Best Practice in upskilling, reskilling, attracting staff has all or many of these characteristics:

1

It has a clear goal.

2

It purposely addresses the bridging of existing skills gaps and future skills needs in tourism.

3

The organisation and individual staff members have a set of core values that strengthen their dedication, morale, and resolve a shared sense of purpose for the work.

4

It looks at urgent skills development challenges and human capital in their context – on macro level (sustainable/digital transition in tourism), sector/subsector level or skills level (digital, social, green skills).

5

It targets the underlying causes in addition to the challenge in upskilling and reskilling, attracting/retaining.

In the following sections, a short overview and analysis will be provided of each of the Best Practices investigated in the frame of the PANTOUR project.

TOP Rent-a-car, Bulgaria



5.1 BEST PRACTICE: TOP Rent-a-car, Bulgaria

5.1.1 Background information

Top Rent-a-Car is the leading national car rental company in Bulgaria. They operate the largest fleet in the country, which currently consists of over 2000 cars (90% of them are brand new), and offer national coverage of the service through more than 13 offices in the country.

5.1.2 Analysis and overview

Key principles

Behind the leading Bulgarian car hire company stays a team of professionals committed to the mission always to provide outstanding service to the customers. In order to offer the best customer care, the company has elaborated a portfolio of programmes for initial and regular training for all employees, as well as other stimuli for developing their social, green and digital skills. The trainings are fully standardised in order to ensure a consistent high quality of service throughout all offices of the company. The focus is on the social skills (efficient communication and multicultural interaction), but the employees also develop certain digital skills (in order to work with the internal system), and green skills (especially in recommending particular car models, which are environmentally friendly).

Examples and case studies

The ***Initial /Introductory training*** is a clear well-structured system, encompassing all processes and tasks for the newly recruited employees. It is based on 2 internal documents – Standards and Instructions Manual, and Internal Regulations Book. The entire duration of the Initial Training is 3 weeks. Every new employee gets a Mentor, who is his/her direct supervisor. After getting to know the main standards and regulations, the new employee starts the practical part. During the first week the employee only watches the processes and learns all steps and standards of operation. Thus, the trainee gets oriented not only in his/her job, but also understands how the company operates. In this time the employee learns the internal software system (gets digital skills), gets acquainted with the colleagues from the same department (social skills), and studies the main vision and principles of the company, committed to offer the best customer service and alleviate the carbon footprint on the environment (social and green skills).

During the second week of the training the employee starts to work with real clients and situations, all the time accompanied by his/her supervisor. The trainee can now apply all knowledge and excel her/his skills in a fully controlled environment. The supervisor stays next to the trainee all the time, lets him/her implement all tasks, and interferes only if necessary.

The last week of the training provides almost full independence for the trainee. He/she works alone, but still anytime can ask for help the supervisor. After the training is over, the employee is ready to work in a full capacity.

TOP Rent-a-car understands the value its employees bring to the customers and the company, and organizes regular trainings (2-3 times a year) to enhance the employees' skills. The topics of the trainings depend on the particular needs of the employees, e.g. leadership, talent management, team work, etc.

Potential pitfalls and challenges

One of the main challenges in front of the Top Rent-a-car company is the opportunity to organize training for all employees simultaneously, since the offices are dispersed around the country. Therefore, most of the trainings are implemented on regional or city level.

Benefits and outcomes

There are **Monthly Assessments** – another internal system for evaluation of the employees' competences, needs and performance. The Monthly Assessment is the mean of four elements – Quality & Control grade, Supervisor's grade, Customers' grade and Standards application grade. It provides a holistic evaluation of the employee's performance and sets the ground for additional trainings, if necessary. Moreover, on the basis of the Monthly Assessment, the employees are awarded with promotion or financial stimuli.

Responsibility and accountability

The trainings are organized by the HR team of Top Rent-a-car and coordinated with the regional managers of the company.

References and external resources

Website of the company: <https://toprentacar.bg>



Social skills

Digital skills

Green skills

Conclusion

TOP Rent-a-car emphasizes on developing certain skills in all their employees, e.g. working with the internal software requires improving digital skills, the introduction of electrical cars calls for developing green skills for resource efficiency and transition to low carbon economy. Special focus of the training is put on the capabilities for effective communication and intrapersonal skills – the trainings are set around the team work, conflict resolution, emotional intelligence, (inter) cultural competences and provision of the best customer care.



5.2 BEST PRACTICE: Sun Spree Academy, Sofia

5.2.1 Background information

Sun Spree Academy (<https://sunspreecademy.bg>) is a travel agency, which evolved as a training centre, specialized in provision of short courses in the field of tourism and hospitality. Their mission is to provide professional training from practitioners to practitioners. The academy offers a wide range of courses that cover all major aspects of tourism including tourism management, hospitality, travel agency, tour guiding and many more. The goal is to provide the necessary knowledge and skills to create competent and innovative professionals in the tourism industry.

5.2.2 Analysis and overview

Key principles

Sun Spree Academy offers a portfolio of courses, covering essential skills and subsectors in the tourism industry. Sun Spree Academy is unique for their exceptional teaching staff. All the teachers are prominent professionals with extensive experience in the tourism industry. They are prepared to provide with up-to-date knowledge and practical skills that will help tackling the challenges of the tourism industry.

Examples and case studies

Sun Spree Academy offers a wide range of trainings to develop and improve leadership and management skills (social skills). The courses cover the basic skills that every manager needs to have at the highest possible level, like effective problem-solving, application of analytical and evaluative thinking, open-mindedness, and flexibility to explore unconventional solutions and possibilities, change management, crisis management, etc. The trainings are short – 1 or 2 days, which allows the trainees to have condensed knowledge for comparatively short period. Moreover, the courses are affordable, and thus more employees can go and enhance their competences and skills. Some examples of such trainings include: Conflicts resolution, Time management, Provision of adequate feedback, Problem solving, etc. Also, the Academy provides specific courses for the tourism subsectors, e.g. for travel agencies – Negotiation process between hotels and tour operators; for hostels – Pricing and sale in hospitality; Event management, etc.

A great example of digital skills training is the course about application of AI in hospitality. A major part of the course is devoted to the proper planning of a chatbot project, the creation of a chatbot and good practices in working with its individual parts, as well as the use and promotion of the chatbot online and offline in order to maximize its inclusion in the digital ecosystem of the business, in digital marketing, upgrading the customer experience on the business website, promoting the chatbot online and offline at all stages of the customer experience – before, during and after providing the tourist service. Case studies of specific Bulgarian chatbots with conversational artificial intelligence in hospitality and tourism are examined in detail. The main advantage of the course is that the teacher herself is working in the tourism industry, and the focus of the training is on practical knowledge and acquiring particular digital skills.

Benefits and outcomes

The biggest benefit of Sun Spree Academy trainings is the opportunity to gather people from the industry and to enhance the effect of the training with networking and sharing knowledge and useful experience.



Social skills

Digital skills

Green skills

Conclusion

Sun Spree Academy is focused on the practical knowledge and tools, provided from practitioners to practitioners. The courses cover the basic skills that every manager needs to possess at the maximum possible level.

Stariat Chinar *Restaurant Chain*



5.3 BEST PRACTICE: Stariat Chinar Restaurant Chain

5.3.1 Background information

Stariat Chinar is a chain of restaurants, offering high quality traditional and international cuisine. There are 6 restaurants, in prominent locations around Varna, Sofia, as well as a catering company. They emphasize on the great combination of delicious food, local hospitality and wonderful customer service. Therefore, the chain has developed special internal organization and trainings for all their front office employees, i.e. waiters, supervisors and restaurant managers.

5.3.2 Analysis and overview

Key principles

The Stariat Chinar restaurant chain emphasizes the idea that people learn more easily by observing a good example. All training sessions are conducted internally, on-the-job, with each new employee being assigned a mentor, typically their direct supervisor. A distinctive aspect of this approach is the pivotal role played by the mentor, who actively engages in task performance in the presence of the mentee, demonstrating the proper execution of specific job responsibilities.

Examples and case studies

The trainings are introductory and regular. They encompass mentoring on the spot, and include various practical skills and competences. The restaurant chain is using a specialized app for the internal management and dealing with the orders – this requires developing specific digital skills. Since the main advantage of the restaurants Stariat Chinar is the great customer care, an essential part of the trainings is dedicated to social and cultural skills.

All newly recruited employees pass an introductory training. The first stage of the training is to learn the so-called technical skills – to carry plates, to know the menu, to get oriented among the tables, and to work with the internal software system. During this stage the trainee mostly watches and studies the operational processes. Very important point is the communication among the employees, the hierarchy and sequence of steps in the provision of customer service. After the trainee finishes this stage, he starts assisting his mentor in the job. Customer service is considered as a cycle, in which the waiters should “lead” the customers in their journey, while being in the restaurant. This means to welcome and accommodate the clients, make them feel comfortable and relaxed, present the menu, assist in the choice and answer to all questions and preferences. In this process the waiters perform as leaders, who care for the customers. In this regard, acquiring skills like empathy, efficient verbal and nonverbal communication, establishing and maintaining positive relationships, resolve conflicts, and work well with others are the main focus of the training. Very commonly applied approach is mentor shadowing – the mentor demonstrates the best service and task implementation, and shows the trainee how to do it step by step.

Potential pitfalls and challenges

Organization of the front-end customer service is based on team service, i.e. all waiters care for all guests. Therefore, Stariat Chinar chain management encourages team work and helping each other. The waiters have to learn to interact and communicate not only with the clients, but mostly with their colleagues and employees from the other departments. The hierarchy and

organization entirely support team job – the waiters help each other, even if they work in different areas within the restaurant. However, sharing responsibilities and benefits within a team sometimes is challenging for employees, who are used to a more individually based performance and awards. That is why the chain management organizes regular teambuilding sessions and some contests to further enhance the motivation of their employees, e.g. a contest to sell the most wines per week/month, with some small award for the winner.

Benefits and outcomes

The training program at the Stariat Chinar restaurant chain brings several benefits for its employees:

Enhanced Digital Skills: The use of a specialized app for internal management and order handling equips employees with specific digital competencies, which are essential in today's technology-driven service industry.

Technical Proficiency: The training in technical skills such as carrying plates, knowing the menu, orienting among tables, and using the internal software system ensures that employees are operationally competent.

Development of Soft Skills: Focus on empathy, efficient communication, conflict resolution, and relationship management are critical for personal development and improving customer interactions.

Mentorship and Shadowing: This approach allows trainees to learn directly from experienced staff, ensuring a hands-on learning experience and adherence to best service practices.

Team-Oriented Service Approach: Learning to work effectively in a team, especially in a setup where waiters care for all guests, reinforces the importance of collective effort over individual performance.

Addressing Potential Pitfalls: Regular team-building sessions and motivational contests help in overcoming challenges related to sharing responsibilities and benefits within a team.

References and external resources

Website of the company: <http://www.stariachinar.com>



Social skills

Digital Skills

Green skills

Conclusion

Stariat Chinar Restaurant Chain training programme not only enhances the skills and competencies of the employees but also contributes to the overall quality of service and customer satisfaction, which are crucial for the success and reputation of the restaurant chain

SLS Consulting Ltd.

*A hotel management
company*



5.4 BEST PRACTICE: SLS Consulting Ltd.

5.4.1 Background information

SLS Consulting Ltd. was established in 2017 as a hotel management company. Within its portfolio, one can discover a comprehensive range of hotel and restaurant management services, alongside relevant staff training at all levels. The company conducts thorough analyses of its customers to gain a deep understanding of their needs. It adopts the goals of its clients as its own business objectives, offering solutions and opportunities aimed at enhancing customer satisfaction and driving business success. Among SLS Consulting Ltd.'s clients are numerous 4-star and 5-star hotels in Bulgaria.

5.4.2 Analysis and overview

Key principles

The company undertakes a wide range of tasks for its client properties, ranging from overseeing day-to-day operations to strategic planning for the future. By providing comprehensive training to all employees in all departments, SLS Consulting ensures that its staff is well-equipped to deliver exceptional service, operate efficiently, and contribute to the overall success of the hotel. Therefore, the company has developed tailor-made programs consisting of smaller modules designed to address each property's specific issues. This modular approach allows for focused attention on particular problem areas that require restructuring, optimization, or renovation.

Examples and case studies

Before commencing any training, SLS Consulting conducts a detailed analysis of each department's needs and issues. Based on this assessment, they construct modules and create a training schedule. A mandatory read for every staff member is the Manual with Internal Regulations and Standards. All training sessions begin with a detailed explanation of the hotel's common rules and standards, supported by explanations and videos. The goal is to provide a comprehensive overview to all employees about how the hotel operates, its hierarchy, communication and coordination among different departments, general obligations, and the responsibilities of each department. This approach helps employees learn how to address relevant departments or individuals when issues arise. Moreover, the overview of hotel operations encourages staff to work as a team and contribute to the synergy of all departments.

The next step involves providing training for each module, as planned based on the preliminary analysis. In these tailor-made training sessions, SLS Consulting delves into the details of upskilling and reskilling employees. Special emphasis is placed on soft skills such as communication, coordination, leadership, teamwork, especially concerning customer service and internal communication. An interesting addition is the use of short, humorous videos to illustrate what is NOT allowed.

Department managers and supervisors receive separate training, with a greater focus on managerial skills rather than operational issues. Additionally, managers observe the entire process and learn how to identify certain issues and improvements to enhance the provision of better service.

Potential pitfalls and challenges

Many employees lack motivation to learn and improve, mainly due to the seasonality and the currently damaged image of the hospitality industry. Moreover, some supervisors and young managers lack a vision for long-term development and career growth, which hinders the focus of their training.

Benefits and outcomes

SLS Consulting provides a comprehensive range of complementary training modules, efficiently covering all departments and addressing identified gaps. A significant benefit for employees is the opportunity to understand how the entire hotel operates and to recognize their own contributions to seamless customer service.

Responsibility and accountability

SLS Consulting typically provides most of the training in-house, but for specific training needs (e.g., engineering maintenance), they may outsource to other companies.

References and external resources

Website of the company: <https://slsconsulting.eu>



Social skills

Digital skills

Green skills

Conclusion

SLS Consulting Ltd. applies a holistic approach in elaboration of training programmes to fit the particular hotel needs and plans for development. The trainings entirely align with the principle of modular design of services.



5.5 BEST PRACTICE:

5.5.1 Background information

Chef & Gastro is a distinctive platform, launched in 2020 by a team of passionate professionals. Its purpose is to aggregate and continually update a comprehensive database on the food and beverage industry, making it a centralized resource in Bulgaria. The platform aims to enhance and modernize existing educational materials, including textbooks, ensuring easy accessibility and alignment with contemporary teaching methodologies and the latest trends in professional culinary education. Chef & Gastro platform is still in a process of development and enriching its resource database.

5.5.2 Analysis and overview

Key principles

- Chef & Gastro focuses on creating and promoting a portfolio of short-term courses and trainings to aid in restaurant industry education.
- The platform emphasizes innovative forms of learning, appealing to younger generations and covering the entire technological process.
- It demonstrates and utilizes modern kitchen and restaurant equipment, helping employees familiarize themselves with these tools.

Examples and case studies

The platform serves as a base for a variety of educational formats such as short-term courses, seminars, and presentations, and also functions as a self-learning resource. This initiative enhances motivation and practical skills among individuals in the restaurant industry. Through its innovative approach, Chef & Gastro aspires to be a trusted source of knowledge and an effective tool in the training and re-skilling of industry employees.

The platform's educational program is holistic and well-structured, covering a broad spectrum of topics such as culinary techniques, food physiology, food safety, and menu planning. It employs a modular approach, blending video content, textual material, tests, and practical exercises. The long-term vision is to integrate the platform into the dual education systems of hospitality vocational schools.

Moreover, Chef & Gastro incorporates elements of business management and marketing, designed to foster career advancement for chefs and restaurant managers. The platform places a significant focus on cultivating entrepreneurial skills and effective management of culinary and restaurant enterprises.

Potential pitfalls and challenges

The platform is currently in a developmental stage and still needs to add numerous resources. Additionally, the business model requires refinement. The platform strives to find the best balance between its social role and economic stability. It aims to aid in training as many people as possible, thereby elevating the entire sector's standards, while also ensuring its own long-term viability and capability for self-financing and ongoing development.

Benefits and outcomes

Chef & Gastro platform provides current, easily accessible, and professional information, because of the implementation of the modular principle to bring systematic efficiency in personnel training. It strives to integrate dual

education to improve staff skills. To do this, the platform takes a step-by-step approach to each skill, ensuring better focus rather than broad, general training.

Chef & Gastro offers opportunities for currently employed professionals to further develop and branch out within the restaurant industry. It emphasizes not just technical cooking skills but also key managerial and entrepreneurial skills, essential for every head chef. A special focus is given to the promotion of ecological and green skills in the Bulgarian F&B industry, which for now are lacking behind.

References and external resources

Website of the platform: <https://chefandgastro.com>



Social skills

Digital skills

Green skills

Conclusion

Chef & Gastro is a platform, dedicated to the entire F&B sector in Bulgaria. Through the large database of short courses, seminars and events it aims at filling the gaps in basic knowledge in the food industry, establishing a systematic foundation for skill-building. Therefore, the platform highlights that learning is a continuous, lifelong process, not a one-off occurrence.

PANTOUR

Pact for **Next Tourism** **Generation Skills**



The PANTOUR consortium builds on previous knowledge and tools produced by the Blueprint for Sectoral Skills project/NTG Alliance and will develop new tools and methodology to address strategic and sustainable approaches and cooperation between vocational education, training, higher education, enterprises of the tourism sector, looking to boost innovation in Europe.

 facebook.com/nexttourismgeneration

 twitter.com/NTGAlliance

 linkedin.com/company/pantour-pact-for-next-tourism-generation-skills/

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 **PANTOUR**
PACT FOR NEXT TOURISM GENERATION SKILLS

<https://nexttourismgeneration.eu/pantour/>



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APPENDICES

Appendix 1. Examples of digital skills training providers in Bulgaria

Training provider name: Varna University of Management, Bulgaria
Website: https://vum.bg/bachelor-degrees/hm/
Type of provider (see list above): University
Covered skills types (see list in <i>General Introduction</i>): Module <i>Technologies in Tourism and Hospitality</i> as part of the Professional Bachelor in Hotel Management programme. Digital skills: computer literacy, online marketing and communication, basic knowledge about all technologies applied in the tourism and hospitality industries, including hotel and restaurant software, websites, social media, in-room technologies, AR/VR, robots/
Methods of delivery (i.e., online/class; modules/courses/trainings, certification): Delivered face-to-face at the university premises

Training provider name: College of Tourism at the University of Economics-Varna, Bulgaria
Website: https://ue-varna.bg/en/subject/449
Type of provider (see list above): University/College
Covered skills types (see list in <i>General Introduction</i> of this document): Module <i>Computer Systems in Restaurants and Hotels</i> as part of the Professional Bachelor in Hotel and Restaurant Management Programme Digital skills: computer literacy, basic knowledge on online marketing and communication and some technologies in the tourism and hospitality
Methods of delivery (i.e., online/class; modules/courses/trainings, certification): Delivered face-to-face at the university premises; distance and part-time studying

Training provider name: International Business School, Botevgrad
Website: https://ibsedu.bg/bg/speciality/30-Tourism-and-entrepreneurship
Type of provider (see list above): University
Covered skills types (see list in <i>General Introduction</i>): Digital skills: computer literacy, basic knowledge on online marketing and communication and some technologies in the tourism and hospitality Module <i>Digital transformation in business</i>
Methods of delivery of this provider (i.e., online/class; modules/courses/trainings, certification): Class on <i>Digital Transformation of Business</i> as part of the Tourism and Entrepreneurship Bachelor programme

Training provider name: VET centre "Zenyт"
Website: https://zenyt.com/obuchenia/%d0%bf%d1%80%d0%be%d1%84%d0%b5%d1%81%d0%b8%d0%be%d0%bd%d0%b0%d0%bb%d0%bd%d0%be-%d0%be%d0%b1%d1%83%d1%87%d0%b5%d0%bd%d0%b8%d0%b5-%d0%bf%d0%be-%d1%87%d0%b0%d1%81%d1%82-%d0%be%d1%82-%d0%bf%d1%80%d0%be/
Type of provider (see list above): Vocational Educational Centre
Covered skills types (see list in <i>General Introduction</i>): Digital skills: computer literacy, basic knowledge on online marketing and communication Courses for jobs in Hotel industry, Housekeeper, Waiter, Bartender
Methods of delivery (i.e., online/class; modules/courses/trainings, certification): In class or distance learning through a digital platform for education After completion of the course a certificate is issued, officially recognised by the Ministry of Education and Science

Training provider name: VET centre Davitoz
Website: https://www.davitoz.org/vocational-training/
Type of provider (see list above): VET centre
Covered skills types (see list in <i>General Introduction</i>): Courses for Restaurant manager, Barman, Cook, Waiter, Pastry chef, Baker, Pizza chef, Hotel manager, Receptionist, Chamber maid/Housekeeper, Porter/Bellboy, Tourist animator, Tour guide, Fitness instructor. Digital skills: computer literacy, basic knowledge on online marketing and communication
Methods of delivery (i.e., online/class; modules/courses/trainings, certification): In-class and online

Training provider name: VET Consult DM Ltd.
Website: https://cpodm.eu/predlagani-profesii-i-specialnosti
Type of provider (see list above): VET Centre
Covered skills types (see list in <i>General Introduction</i>): Digital skills: computer literacy, basic knowledge on online marketing and communication Courses for Hotel manager, Receptionist, Housekeeper, Restaurant manager, Cook, Waiter, Bartender
Methods of delivery (i.e., online/class; modules/courses/trainings, certification): In-class, distance learning and online training

Training provider name: VET Centre of Grand Hotel Plovdiv
Website: https://cpograndhotel-plovdiv.com/index.php

Type of provider (see list above): VET centre
Covered skills types (see list in <i>General Introduction</i>): Digital skills: computer literacy, basic knowledge on online marketing and communication Courses for: Restaurant manager, Hotel manager, Cook, Chef, Baker, Waiter, Bartender, Receptionist, Travel agent, Tour guide, Animator, Housekeeper, Picolo/Bellboy
Methods of delivery (i.e., online/class; modules/courses/trainings, certification): In-class delivery

Training provider name: Vocational High school in tourism “Dr. Vassil Beron”, Veliko Tarnovo
Website: https://www.vtpgt.com/?p=projects
Type of provider (see list above): Secondary VET school
Covered skills types (see list in <i>General Introduction</i>): Digital skills: computer literacy, basic knowledge on online marketing and communication, web & app development, digital design, etc. Special projects implemented to include trainings in digital skills in competences both for the lecturer and the students
Methods of delivery (i.e., online/class; modules/courses/trainings, certification): In-class only.

Training provider name: Vocational High school in trade and restaurant management, Vratza
Website: https://pgtr-vratza.com/
Type of provider (see list above): Secondary VET school
Covered skills types (see list in <i>General Introduction</i>): Digital skills: computer literacy, basic knowledge on online marketing and communication, web & app development, digital design, etc. Special projects implemented to include trainings in digital skills in competences both for the lecturer and the students
Methods of delivery (i.e., online/class; modules/courses/trainings, certification): In-class only.

Training provider name: Vocational High school in tourism and clothing, Pernik
Website: http://pgotpernik.com/%D0%BA%D0%BB%D1%83%D0%B1-%D0%B4%D0%B8%D0%B3%D0%B8%D1%82%D0%B0%D0%BB%D0%BD%D0%B8-%D0%BA%D0%BE%D0%BC%D0%BF%D0%B5%D1%82%D0%B5%D0%BD%D1%82%D0%BD%D0%BE%D1%81%D1%82%D0%B8/
Type of provider (see list above): Secondary VET school
Covered skills types (see list in <i>General Introduction</i>): Digital skills: computer literacy, basic knowledge on online marketing and communication, web & app development, digital design, etc.

Special club “Digital competences” to train digital skills and literacy
Methods of delivery (i.e., online/class; modules/courses/trainings, certification): In-class only.

Training provider name: StartUp Factory, Ruse
Website: https://startupfactory.bg/obuchenia/
Type of provider (see list above): Incubational center; ICT Training provider; NGO
Covered skills types (see list in <i>General Introduction</i>): Digital and entrepreneurship skills, e.g. programming, web & app development, digital content and design, social media use, web-based communications, etc.
Methods of delivery (i.e., online/class; modules/courses/trainings, certification): In-class, video classes

Training provider name: Telerik Academy
Website: https://www.telerikacademy.com/school/about
Type of provider (see list above): Commercial trainer – corporate training, upskilling, courses for secondary school level and kids
Covered skills types (see list in <i>General Introduction</i>): Digital skills and social skills The company has numerous partners around the country (Innovator hubs, professional centres, secondary schools, etc.). A special focus on the developing of kids’ digital skills at a very early age (10-12 years old). Courses are mostly on digital skills – web development, digital science, competitive programming, game development. Besides, for the corporate training and upskilling the company includes at least 20% of the materials and time for soft and social skills development.
Methods of delivery (i.e., online/class; modules/courses/trainings, certification): In-class and distance learning

Training provider name: Software University/SoftUni
Website: https://softuni.org/about/
Type of provider (see list above): Commercial trainer
Covered skills types (see list in <i>General Introduction</i>): A full portfolio of different courses related to all digital skills and programming. the biggest non-formal tech education provider in South-Eastern Europe. Their teaching experience encompasses corporate trainings, bootcamps, and custom courses designed to elevate internal teams’ technical skills in new or niche technologies.
Methods of delivery (i.e., online/class; modules/courses/trainings, certification): In-class, distance learning and online classes

Training provider name: New Horizons
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Website: https://bg.newhorizons.bg/
Type of provider (see list above): Commercial trainer
Covered skills types (see list in <i>General Introduction</i>): Digital and social skills Application courses, Technical skills courses, Business skills courses
Methods of delivery (i.e., online/class; modules/courses/trainings, certification): In-class, distance learning, online live, online remote

Appendix 2. Examples of green skills training providers in Bulgaria

Training provider name: University of Food Technology, Plovdiv
Website: https://uft-plovdiv.bg/stopански-факултет-бакалавърски-пр/
Type of provider (see list above): University
Covered skills types (see list in <i>General Introduction</i>): Green skills: resource efficiency and environmental management Module <i>Ecology, sustainable development and safety</i> as part of the Bachelor programmes “Tourism”, “Catering” and “Hotel and restaurant management”. Module <i>Food Service Facilities Hygiene</i> as part of the Bachelor programmes “Nutrition and Tourism” and “Catering”.
Methods of delivery (i.e., online/class; modules/courses/trainings, certification): In-class delivery

Training provider name: South-West University, Blagoevgrad, Bulgaria
Website: https://www.swu.bg/bg/prospectivestbg/admse/96-bprogrammescat/tourismcat/148-susttourismbgart
Type of provider (see list above): University
Covered skills types (see list in <i>General Introduction</i>): Green skills: resource efficiency and environmental management, sustainable development Bachelor programme Sustainable Tourism, with an explicit focus on the sustainable practices, green development, environmental protection, etc. Some of the modules delivered include <i>Ecology and responsible tourism, Sustainable tourism and sustainable mobility, Corporate social responsibility, Sustainable tourism certification, Management of ecological events, etc.</i>
Methods of delivery (i.e., online/class; modules/courses/trainings, certification): In-class delivery

Training provider name: University of National and World Economy, Sofia, Bulgaria (UNWE)
Website: http://departments.unwe.bg/tourism/bg/pages/17699/%d0%be%d0%ba%d1%81-%d0%b1%d0%b0%d0%ba%d0%b0%d0%bb%d0%b0%d0%b2%d1%8a%d1%80.html
Type of provider (see list above): University
Covered skills types (see list in <i>General Introduction</i>): Green skills: sustainability communication Module <i>Ecology and sustainable development</i> as part of the Bachelor programme “Tourism”
Methods of delivery (i.e., online/class; modules/courses/trainings, certification): In-class delivery

Training provider name: VET Estetika 2009 Ltd.
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Website: https://profesionalni-kursove.com/gotvach/
Type of provider (see list above): Vocational and Educational Centre
Covered skills types (see list in <i>General Introduction</i>): Green skills: resource efficiency and environmental management Courses for the jobs Chef cook, Hotel manager, Restaurant manager, Waiter/Bartender
Methods of delivery (i.e., online/class; modules/courses/trainings, certification): In class or distance learning courses through a digital platform for online education

Training provider name: VET EuroAcademy for Training and Development, Sofia
Website: https://euroacademybg.com/gotvarski-sladkarski-korporativni-kursove/
Type of provider (see list above): Vocational Education and Training centre; Corporate trainings
Covered skills types (see list in <i>General Introduction</i>): Green skills: resource efficiency and environmental management Courses for jobs, specialized in F&B and culinary arts, e.g. Chef cooks, Pastry chef, Cook
Methods of delivery (i.e., online/class; modules/courses/trainings, certification): In class courses, with included apprenticeship in prominent restaurants

Training provider name: Vocational High School in tourism "Aleko Konstantinov", Pleven
Website: https://pgt-pleven.com/
Type of provider (see list above): Secondary VET school
Covered skills types (see list in <i>General Introduction</i>): Green skills: resource efficiency and environmental management
Methods of delivery (i.e., online/class; modules/courses/trainings, certification): In-class only

Training provider name: Sofia Vocational High school in tourism
Website: http://spgt.org/
Type of provider (see list above): Secondary VET school
Covered skills types (see list in <i>General Introduction</i>): Green skills: resource efficiency and environmental management
Methods of delivery (i.e., online/class; modules/courses/trainings, certification): In-class only

Training provider name: Vocational High school in tourism "Ivan Pavlov", Ruse
Website: https://pgtourism.info/
Type of provider (see list above):

Secondary VET school
Covered skills types (see list in <i>General Introduction</i>): Green skills: resource efficiency and environmental management
Methods of delivery (i.e., online/class; modules/courses/trainings, certification): In-class only

Training provider name: Greener Project
Website: https://greener-project.eu/training-resouces/
Type of provider (see list above): Commercial training provider
Covered skills types (see list in <i>General Introduction</i>): Green skills: resource efficiency and environmental management
Methods of delivery (i.e., online/class; modules/courses/trainings, certification): In-class, distance studying

Appendix 3. Examples of social skills training providers in Bulgaria

Training provider name: Sofia University, Bulgaria
Website: https://www.uni-sofia.bg/index.php/bul/universitet_t/fakulteti/geologo_geografski_fakultet/specialnosti/bakalav_rski_programi/geologo_geografski_fakultet/turiz_m
Type of provider (see list above): University
Covered skills types (see list in <i>General Introduction</i>): Social skills: <ul style="list-style-type: none"> • competences for managing personal relationships, demonstrating empathy, and cooperating with others; • showing a positive attitude, respect, inclusivity, and intercultural sensitivity • interpersonal and intrapersonal skills; • competences that promote social progress which recognizes the needs of everyone; Several modules like <i>Psychology, Philosophy, History of arts, Cultural geography in Europe, Customer care, Business communication, Customer psychology</i> in the Bachelor programme “Tourism”
Methods of delivery (i.e., online/class; modules/courses/trainings, certification): In-class delivery, distance and part-time delivery

Training provider name: University of Economics, Varna
Website: https://ue-varna.bg/en/subject/380
Type of provider (see list above): University
Covered skills types (see list in <i>General Introduction</i>): Social skills: <ul style="list-style-type: none"> • interpersonal and intrapersonal skills; • competences for managing personal relationships, demonstrating empathy, and cooperating with others; • showing a positive attitude, respect, inclusivity, and intercultural sensitivity; • cross-cultural understanding, supporting diversity, gender and racial equality; Several modules like <i>Social Psychology in tourism, Customer care, Culture and civilisations, Bulgarian folklore and ethnography, Service management in tourism</i> from the Bachelor programme “Tourism”
Methods of delivery (i.e., online/class; modules/courses/trainings, certification): In-class and distance learning

Training provider name: VET Center EGO
Website: https://cpo.centre-ego.info/%d0%b0%d0%b4%d0%bc%d0%b8%d0%bd%d0%b8%d1%81%d1%82%d1%80%d0%b0%d1%82%d0%be%d1%80-%d0%b2-%d1%85%d0%be%d1%82%d0%b5%d0%bb%d0%b8%d0%b5%d1%80%d1%81%d1%82%d0%b2%d0%be%d1%82%d0%be/
Type of provider (see list above):

VET centre
Covered skills types (see list in <i>General Introduction</i>): Social skills: <ul style="list-style-type: none"> • competences for managing personal relationships, demonstrating empathy, and cooperating with others; • showing a positive attitude, respect, inclusivity, and intercultural sensitivity Courses: Receptionist, Housekeeper, Waiter, Bartender
Methods of delivery (i.e., online/class; modules/courses/trainings, certification): In-class delivery

Training provider name: VET centre to the IntelCOOP Hotel Ltd.
Website: https://www.intelcoop.bg/bg/profesionalno_obuchenie/
Type of provider (see list above): VET Centre; Corporate training
Covered skills types (see list in <i>General Introduction</i>): Social skills: <ul style="list-style-type: none"> • competences for managing personal relationships, demonstrating empathy, and cooperating with others; • showing a positive attitude, respect, inclusivity, and intercultural sensitivity Courses: Hotel manager, Receptionist, Housekeeper, Chef, Cook, Waiter, Bartender, Tour guide, Travel agent
Methods of delivery (i.e., online/class; modules/courses/trainings, certification): In-class delivery

Training provider name: VET Bogoya, Varna
Website: https://bogoia.net/avada_portfolio/%d0%b0%d0%bd%d0%b8%d0%bc%d0%b0%d1%82%d0%be%d1%80-%d0%b2-%d1%82%d1%83%d1%80%d0%b8%d0%b7%d0%bc%d0%b0/?portfolioCats=45
Type of provider (see list above): VET centre
Covered skills types (see list in <i>General Introduction</i>): Social skills: <ul style="list-style-type: none"> • competences for managing personal relationships, demonstrating empathy, and cooperating with others; • showing a positive attitude, respect, inclusivity, and intercultural sensitivity Courses: Animator, Waiter, Bartender, Chef, cook, Restaurant manager, Housekeeper, Receptionist
Methods of delivery (i.e., online/class; modules/courses/trainings, certification): In-class and online through Moodle-based platform

Training provider name: Vocational high school in Tourism “Prof. Assen Zlatarov”, Varna
Website: https://www.pgtvarna.com/
Type of provider (see list above): Secondary VET school
Covered skills types (see list in <i>General Introduction</i>):

<p>Social skills:</p> <ul style="list-style-type: none"> • competences for managing personal relationships, demonstrating empathy, and cooperating with others; • showing a positive attitude, respect, inclusivity, and intercultural sensitivity • interpersonal and intrapersonal skills;
<p>Methods of delivery (i.e., online/class; modules/courses/trainings, certification): In-class only</p>

<p>Training provider name: Vocational High school in tourism “Alexander Paskalev”, Haskovo</p>
<p>Website: https://pgthas.com/</p>
<p>Type of provider (see list above): Secondary VET school</p>
<p>Covered skills types (see list in <i>General Introduction</i>): Social skills:</p> <ul style="list-style-type: none"> • competences for managing personal relationships, demonstrating empathy, and cooperating with others; • showing a positive attitude, respect, inclusivity, and intercultural sensitivity • interpersonal and intrapersonal skills;
<p>Methods of delivery (i.e., online/class; modules/courses/trainings, certification): In-class only</p>

<p>Training provider name: Vocational high school in tourism, Pleven</p>
<p>Website: https://pgt-pleven.com/</p>
<p>Type of provider (see list above): Secondary VET school</p>
<p>Covered skills types (see list in <i>General Introduction</i>): Social skills:</p> <ul style="list-style-type: none"> • competences for managing personal relationships, demonstrating empathy, and cooperating with others; • showing a positive attitude, respect, inclusivity, and intercultural sensitivity • interpersonal and intrapersonal skills;
<p>Methods of delivery (i.e., online/class; modules/courses/trainings, certification): In-class only</p>

<p>Training provider name: Arthur Adams Business training centre</p>
<p>Website: https://arthuradams.bg/</p>
<p>Type of provider (see list above): Commercial provider of diverse corporate training</p>
<p>Covered skills types (see list in <i>General Introduction</i>): Emotional intelligence, Manager efficiency, Leadership, Successful sales, Soft skills, Coaching</p>
<p>Methods of delivery (i.e., online/class; modules/courses/trainings, certification): In-class and online training</p>

<p>Training provider name:</p>

New Horizons
Website: https://bg.newhorizons.bg/
Type of provider (see list above): Commercial trainer
Covered skills types (see list in <i>General Introduction</i>): Social skills Application courses, Technical skills courses, Business skills courses
Methods of delivery (i.e., online/class; modules/courses/trainings, certification): In-class, distance learning, online live, online remote

