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2021-2027 HUMAN CAPITAL NEEDS ASSESSMENT AND FORECAST

November, 2021

USAID DEVELOPING SUSTAINABLE TOURISM ACTIVITY IN BOSNIA AND HERZEGOVINA [TURIZAM]

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November, 2021

Prepared for:
USAID/Bosnia and Herzegovina
C/O American Embassy
1 Robert C. Frasure Street, Sarajevo BiH

Prepared by:
Chemonics International Inc.
USAID Developing Sustainable Tourism in Bosnia and Herzegovina (Turizam)
Dzavida Haverica 5
Sarajevo BiH

Turizam is funded under USAID Contract No 72016820C00004 and implemented by Chemonics International Inc.

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TABLE OF CONTENTS

ACRONYMS.....	1
DEFINITIONS	2
EXECUTIVE SUMMARY	4
BASELINE AND KEY FINDINGS.....	6
PURPOSE, OBJECTIVES AND METHODOLOGY.....	14
1. PURPOSE, OBJECTIVES AND METHODOLOGY	15
1.1 Purpose.....	15
1.2 Defining human capital.....	15
1.3 Objectives	15
1.4 Structure	16
1.5 Methodology.....	16
2. YEAR 2019 AS A BASELINE TO ASSESSING HUMAN CAPITAL NEEDS	20
2.1 Overview of Bosnia and Herzegovina’s Tourism Industry.....	20
2.2 Tourism Sectors, and Subsectors.....	20
2.3 Tourism Sectors Providing Direct Employment.....	22
3. HUMAN CAPITAL EMPLOYED IN 2019.....	24
3.1 Direct Employment in Tourism Sectors and Entities	25
3.2 Sectors and Levels of Employment	27
3.3 Employment in Tourism Accommodation Subsectors.....	27
3.3.1 Employment in Hotel Accommodations Sector	29
3.3.2 Employment in ‘Other Tourism Accommodation’ Subsectors.....	30
3.3.3 Number Employed in Departments of Tourism Accommodation.....	31
3.4 Employment in Food and Beverage Subsectors.....	31
3.4.1 Number Employed in Departments of Food and Beverage Service	32
3.5 Employment in the Tourism Attractions Sector	33
3.6 Employment in the Tourism Services Sector	34
3.7 Employment in Tourism Transport Services.....	35
3.8 Employment in Tourism Leisure Services	36
4. HUMAN CAPITAL SUPPLY 2021-2027	38
4.1 Secondary Education Schools.....	39
4.2 University and College Education	39
4.3 Adult Learning.....	42
5. GAP ANALYSIS: SUPPLY AND DEMAND.....	44
5.1 Projected Demand for Human Capital – 2024 – 2027	45
5.2 Supply of Graduates and Trained Adults to Enter the Human Capital Pool (see Chapter 4)....	46
6. TOURISM TRAINING NEEDS ANALYSIS.....	48

6.1 Levels of Multi Skilling in Sectors / Subsectors	48
6.2 Training Levels of Tourism Human Capital	49
6.3 Levels of Human Capital Training Planning and Budgeting.....	49
6.4 Human Capital Training Needs by Tourism Subsectors.....	51
6.5 Training Status of Employees	52
6.5.1 Training Status and Needs of Hotel Employees.....	52
6.5.2 Training Status of Apartment Hotel Employees	53
6.5.3 Training Status of Food and Beverage Service Employees	53
6.5.4 Training Status of Tourism Attraction Employees	54
6.5.5 Training Status of Tourism Services Employees	55
6.5.6 Training Status of Tourism Transportation Service Employees.....	55
6.5.7 Training Status of Tourism Leisure Activities Employees.....	55
7. KEY RECOMMENDATIONS FOR HUMAN CAPITAL DEVELOPMENT	57
7.1 Strategic Responses required from the Assessment	57
APPENDIX A: SECONDARY TECHNICAL & VOCATIONAL SCHOOLS WITH PROGRAMS IN TOURISM	61
APPENDIX B: ADULT LEARNING CENTERS / LOCATION & PROGRAMS.....	64
BIBLIOGRAPHY AND REFERENCES.....	65

ACRONYMS

AHLEI	American Hotel and Lodging Education Institute
ALC	Adult Learning Center
BiH	Bosnia and Herzegovina
B2B	Business-to-business
B2C	Business-to-consumer
BD	Brčko District
CLA	Collaborating, learning, and adapting
COVID-19	Coronavirus 2019
DMO	Destination marketing organization
EU	European Union
FBiH	Federation of Bosnia and Herzegovina
GIZ	Deutsche Gesellschaft für Internationale Zusammenarbeit
MEL	Monitoring, evaluation, and learning
NGO	Non-governmental organization
OECD	Organization for Economic Co-operation and Development
PTP	Pathways to Professionalism
RS	Republika Srpska
SME	Small and medium-sized enterprises
TVET	Technical and Vocational Education and Training
UNWTO	United Nations World Tourism Organization
USAID	United States Agency for International Development
VET	Vocational education and training
VS	Vocational school
WEF	World Economic Forum
WTTC	World Travel and Tourism Council

DEFINITIONS

Life-long learning: Life-long learning encompasses all learning activities undertaken throughout life with the aim of improving knowledge, skills, and competences within personal, civic, social, or employment-related perspectives. The intention or aim to learn is the critical point that distinguishes these activities from non-learning activities, such as cultural or sporting activities. Three broad categories of learning activity - formal, non-formal, and informal - are defined in the International Standard Classification of Education 2011.

Formal education: Formal education and training is defined as education that is institutionalized, intentional, and planned through public organizations and recognized private bodies. Formal education is education performed by teacher after which a certain level of education (primary, secondary, or higher education) is obtained in educational institutions in accordance with curricula approved by the competent educational authorities.

Non-formal education and training can be also institutionalized, intentional, and planned by an education provider. It caters to people of all ages but does not necessarily apply a continuous pathway structure, it may be short in duration and/or low-intensity and is typically provided in the form of short courses, workshops, or seminars.

Informal learning consists of activities that are intentional or deliberate but are not institutionalized; consequently, it is less organized and structured.

Job-related non-formal education and training: Individuals take part in non-formal education and training activities to obtain knowledge and/or learn new skills needed for a current or future jobs, to increase earnings, to improve job and/or career opportunities in a current or another field, and generally to improve his/her opportunities for advancement and promotion. (Eurostat, 2021).

Adult education: Education specifically targeted at individuals who are regarded as adults by their society to improve their technical or professional qualifications, further develop their abilities, enrich their knowledge with the purpose to complete a level of formal education, or acquire, refresh, or update their knowledge, skills, and competencies in a particular field. This also includes what may be referred to as 'continuing education,' 'recurrent education,' or 'second chance education'. (ISCED 2011).

Secondary school is an institution for performing an activity in the field of secondary education and upbringing. A school performs educational activity by realizing the educational plan and program. That is an institution where general and vocational knowledge and skills, required for continuing education, are being acquired. School can be established as grammar school, secondary technical or vocational school, religious or art school, school for children with special needs, and secondary school for adult education. (BiH Agency for statistics, 2020a).

Vocational education is defined as education programs that are designed for learners to acquire the knowledge, skills, and competencies specific to a particular occupation, trade, or class of occupations or trades. Such programs may have work-based components (e.g. apprenticeships, dual-system education programs). Successful completion of such programs lead to labor market-relevant, vocational qualifications acknowledged as occupationally oriented by the relevant national authorities and/or the labor market. (ISCED, 2011).

Grade: is a level of education in which pupils, in a certain time interval but no longer than one school year, attain a certain extent of knowledge in accordance with an educational plan and program of a certain kind of school (BiH Agency for statistics, 2020a).

ISCED: The International Standard Classification of Education belongs to the United Nations International Family of Economic and Social Classifications, which are applied in statistics worldwide

with the purpose of assembling, compiling, and analyzing cross-nationally comparable data. ISCED is the reference classification for organizing education programs and related qualifications by education levels and fields. ISCED is a product of international agreement and adopted formally by the General Conference of UNESCO Member States. (ISCED 2011).

Classification of education - ISCED 2011: The International Standard Classification of Education is used as recommended by UNESCO, the OECD, Eurostat, and other international organizations for presenting statistics of education. This classification allows education statistics data to be comparable at the international level. Educational programs are classified by levels and fields of education. (BiH Agency for Statistics, 2020b).

The educational levels according to ISCED 2011 are:

ISCED 0	corresponds to pre-school education in the education system of Bosnia and Herzegovina. There is a nine-year primary education in Bosnia and Herzegovina.
ISCED 1	corresponds to education in lower grades of primary school, from 1 to 5 grades in the education system of Bosnia and Herzegovina.
ISCED 2	corresponds to education in upper grades of primary school, from 6 to 9 grades in the education system of Bosnia and Herzegovina
ISCED 3	corresponds to secondary education in the education system of Bosnia and Herzegovina.
ISCED 5	corresponds to the higher education program in the education system of Bosnia and Herzegovina, (VI level).
ISCED 6	corresponds to the higher education program (VII level, bachelor's qualification) in the education system of Bosnia and Herzegovina.
ISCED 7	corresponds to the higher education program (VII level, master's qualification, master of science and specialist) in the education system of Bosnia and Herzegovina.
ISCED 8	corresponds to the higher education program (VII level, doctoral qualification) in the education system of Bosnia and Herzegovina.

EXECUTIVE SUMMARY

Bosnia and Herzegovina's tourism industry is one of the driving forces of the country's economy. Due to the development that the tourism industry will be experiencing as travel recovers and destinations open for business, more and more qualified employees will be required. Levels of professionalism and skill must improve to heighten the standards of service and products.

To forecast human capital required in Bosnia and Herzegovina (BiH) in the next seven years and to assess current needs of the industry, USAID funded project Developing Sustainable Tourism Activity in BiH (Turizam) conducted a Human Capital Needs Assessment and Forecast. This document was informed through multiple data sources, extensive consultations with the industry and an examination of international best practices.

There are six main tourism sectors and 23 subsectors, of which there are 3,193 businesses currently operating in BiH. Approximately 66% of businesses are located in the Federation of Bosnia and Herzegovina (FBiH), 33% in Republika Srpska (RS) and 1% in District Brcko. Tourism accommodation and food and beverage services are major sectors together with tourism transport.

Tourism is one of the largest employers in Bosnia and Herzegovina's economy, directly employing 30,422 people. In addition, as projected by World Travel and Tourism Council (WTTC), tourism in Bosnia and Herzegovina created an additional 56,500 indirect and induced tourism related jobs (WTTC, Economic Impact Report: BiH, May 2021). Food and beverage service businesses and restaurants employed the most people at 41%. The accommodation subsector, comprising of hotels, apartment hotels, camping, and other forms was the next highest at approximately 35%. Women make up 42% of the tourism industry's workforce.

In 2019 human capital turnover was a consistent trend across the industry. Turnover was primarily a result of employees leaving in search of better benefits and salaries in addition to being attracted by offers from neighboring Croatia and other EU countries. On the other hand, internal labor mobility within the country is hindered by fragmented pension and contributions system and complex political situation.

Taking into account loss of workforce due to turnover/ replacement/ employees not returning to the industry, the forecasted demand for tourism workers in the next seven years is estimated at 18,500. On the supply side, it is projected that a total of 10,400 new employees will enter the tourism labor market in the same period as graduates from education institutions (Secondary Technical and Vocational Schools, Universities, Colleges and Adult Learning Centers). The projections of human capital demand – supply gap from 2021 to 2027 is estimated at 8,100 more employees needed to meet recovery and growth demand over the next 7 years.

Bridging the human capital supply and skills gap will arguably remain the most pressing issue confronting the tourism industry. Despite the widespread acknowledgement of the importance of education and training for the continued development of the tourism industry, there has been relatively little direct involvement or investment by the industry in this area. A culture of continuous and structured training of staff is necessary within the industry. Similarly, continuing training for managers and owner-managers of tourism businesses, particularly in the case of small family

Tourism in Bosnia and Herzegovina increased in 2019 – visitors are up 13.7%, tourism receipts are up 6%

- Visitors to Bosnia and Herzegovina increased by 13.7% to 1,198,000,
- Average length of stay was 2.02 days,
- Tourism receipts reached US\$ 1.226 billion, increased by 6%,
- WTTC reports that there were 86,800 jobs in tourism (direct + indirect + induced),
- 30,300 of which were direct tourism jobs,
- Employing 10.5% of total workforce in 2019,
- Employment decreased to 68,400 in 2020, a drop of 18,400 jobs or 21.2%.

Source: based on WTTC, May 2021

businesses, does not presently exist on a scale that would permit an upward development shift in the sector.

This assessment report makes a series of informed recommendations for the future development of the tourism industry. To ensure a strategic future for the development of the tourism industry, the following key requirements should be addressed:

Actions by:	Key Recommendations
Relevant Tourism Authorities and Policy Planners	<ol style="list-style-type: none"> 1) Provide a forum for human capital development policy 2) Establish and support Tourism Human Capital Development Councils 3) Prepare tourism human capital development implementation plan 4) Establish a center to coordinate regular human capital assessments
Tourism Education Leaders and Managers	<ol style="list-style-type: none"> 1) Increase enrollment on schools and universities programs 2) Design Curriculum based on Tourism Qualification Framework 3) Curricula strengthened and updated to match industry needs 4) Teaching methods need to be improved 5) Update teachers' and trainers' knowledge of the tourism industry 6) Improve training and teaching resources 7) Strengthen international partnerships 8) Strengthen intern opportunities for graduates 9) Facilitate practical placement experience in program curriculum 10) Plan a College for Culinary Arts for upskilling professional chefs
Tourism Industry Leaders and Managers	<ol style="list-style-type: none"> 1) Prepare tourism occupation and sector skills standards for tourism professions 2) Position the industry as a highly attractive career choice 3) Design and rollout a tourism industry-based training and certification program 4) Strengthen practical experience in programs and internship for graduates 5) Provide training for SME development in tourism 6) Address the shortfall and acquisition of qualified managers



BASELINE AND KEY FINDINGS

Bosnia and Herzegovina's tourism industry is one of the driving forces of the country's economy. According to the UNWTO, 1,198,000 tourists spent an average of 2.02 nights in Bosnia and Herzegovina in 2019. Tourism receipts generated US \$1.226 billion. There are 18,626 tourist accommodation rooms available. As reported by WTTC, tourism resulted in the employment of 86,800 people through direct, indirect and induced jobs. WTTC includes all travel and tourism sectors in its reporting. Of these jobs it was estimated that 30,300 people were employed in direct jobs excluding airlines, sea, and rail travel subsectors. According to the BiH Agency for Statistics, the number employed in the accommodation and food and beverage services subsectors in 2019 was estimated to be 42,500.

HUMAN CAPITAL DEMAND - 2019 AS A BASELINE

Structure of the tourism industry

Tourism has proven to be an effective mechanism for economic growth, job creation, and shared prosperity. Its structure allows for cascading opportunities that link diverse activities in services, transport, accommodation, food, and sought-after experiences. There are six main tourism sectors and 23 subsectors, of which there are 3,193 businesses currently operating in Bosnia and Herzegovina. Approximately 66% of businesses are located in the FBiH, 33% in the RS and 1% in District of Brcko. Tourism accommodation and food and beverage services are major sectors together with tourism transport.

The total tourism activity providers registered in 2019 comprised of 709 tourism accommodation entities, 262 travel agencies, 697 tourist restaurants, 250 car rental providers, and 82 tour operators. The number of classified hotels in 2019 comprised of: 16 five-star hotels, 198 four-star hotels, 102 three-star hotels, and 89 two- and one-star hotels. Approximately 64% are either family-run or owner-managed. This percentage is especially high in the hotel, apartments, restaurant, cafes, and travel agencies subsectors of the industry. Tourism businesses are heavily concentrated in the FBiH with 66% of all businesses, which has 61% of all hotels and 82% of restaurants.

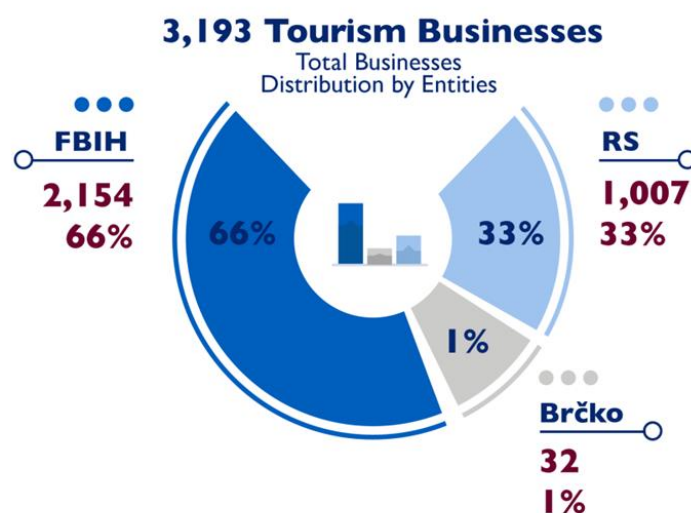
Tourism Facts
6 Sectors
23 Subsectors
3,193 Tourism businesses
709 Accommodation units
405 Hotels
697 Restaurants
262 Travel agencies
82 Tour operators

Human capital employed in 2019

Tourism is one of the largest employers in Bosnia and Herzegovina's economy, directly employing 30,422 people. In addition, as projected by WTTC, tourism in Bosnia and Herzegovina created an additional 56,500 indirect and induced tourism related jobs (WTTC, 2021).

Food and beverage service businesses and restaurants employed the most people at 41%. The accommodation subsector, comprising of hotels, apartment hotels, camping, and other forms was the next highest at approximately 35%. Tour operators and travel agents accounted for 5%. The FBiH (including the capital, Sarajevo) accounts for the most employees at 66%, followed by RS at 33% and Brcko with 1%.

Women make up 42% of the tourism industry's workforce; an approximate 12,638 women are employed in the various sectors of the industry. Most women are employed in the accommodation and food and beverage sectors. Approximately 7,536 (25%) are holding management or supervisory positions, 21,817 (72%) are employed as skilled operative employees, and 3% are in non-skilled operatives. Below table elaborates the total number of employees by main tourism sectors.



Total employee numbers by subsectors

Main Tourism Sectors	No of Direct Employees 2019/ 2020		
	Sub Sector	Total	%
Tourism Travel Services	Travel Agencies, Tour Operators, Other Reservation/Booking Services	1,145	5%
Tourism Transport	Passenger Land Transport including Tourist Buses, Car Rental Companies for Tourists	966	3%
Tourism Accommodation	Hotels Holiday and other Short-stay Accommodation Camping, Recreational Vehicle Parks & other	10,596	35%
Food and Beverages Services	Restaurants, Event and Conference Catering, Beverage Services (including pubs & coffee shops)	14,755	48%
Tourism Attractions	Museums Historical sites and visitor attractions Botanical & zoological gardens & nature reserves	720	2%
Tourism Leisure Activity Providers	Sports and Adventure Business for Tourists Amusement Parks and Theme Parks Conventions and Trade Shows Businesses	2,240	7%
Total Employees by Sectors		30,422	100%

Numbers are rounded up to whole numbers. Source: BiH relevant authorities, and UNWTO (2020) Compendium of Tourism Statistics Dataset for Bosnia and Herzegovina, published October 20, 2020. Also aggregated statistics based on Assessment Survey.

Breakdown of Employment in Subsectors

Accommodation: In 2019 there were an estimated 709 tourism accommodation providers in all of Bosnia and Herzegovina, employing 10,596 employees. The accommodation is structured in seven (7) sub sectors. There are 405 hotels registered and graded in the FBiH, RS, and Brcko District. Hotels are the largest provider of accommodation with hotels graded from 5-star to 1-star. Hotels also employ 80% (8,411) of all those employed. The number of people employed in the 'other accommodation' (motels, apartment hotels, hostels, and camp sites) sector was approximately 2,185 in 2019, representing 20% of the total tourism accommodation human capital.

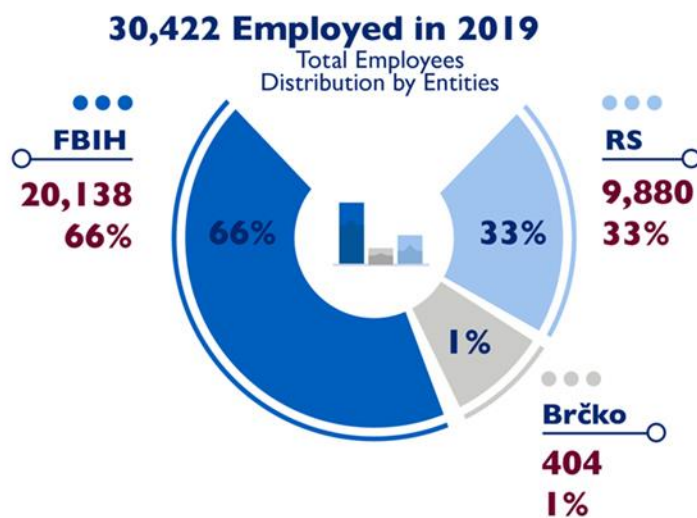
Number of People Employed in Sectors
Accommodation: 10,596
Restaurants: 10,345
Café and Pubs: 4,000
Travel Services: 1,145
Transport: 966
Leisure Activities: 2,240

Food and beverage service: There are 1,117 food and beverage service businesses (restaurants, coffee shops, event catering, and fast-food restaurants) in Bosnia and Herzegovina in 2019. An estimated 70% of these establishments are either family-run or owner-managed. Predictably, the FBiH accounts for the highest number of food and beverage service businesses with 773 businesses employing 10,345 employees, followed by RS with 335 businesses employing 4,120 employees. There are also an estimated 1,750 part-time employees, whose level of skill cannot be reliably quantified.

Tourism services sector: This sector includes inbound, outbound, and domestic licensed tour operators and travel agents. Because tour guides work as individuals and not as businesses, they have been included with travel agents, or alternatively they register themselves as businesses. The subsectors employ 1,145 people, the majority of which are employed (68%) as travel agents. Tour operators employ 25% of the employees.

Tourism transport services: The tourism transport subsector includes car rental and tourism transportation companies in Bosnia and Herzegovina. While it is difficult to know exactly how many coach operators there are, it should be noted that there are 744 transport businesses providing transport for tourists, these include air and rail transport and urban and suburban passenger transport. The measurement of 'direct tourism engagement and employment' was applied, resulting in 642 businesses identified. In 2019 there were 250 car rental businesses. The transport sector employed an estimated 966 employees in 2019. Approximately 60% of the workers are employed in operative grade positions.

Tourism leisure services: The tourism leisure subsector includes sports, adventure, amusement parks, and convention businesses in Bosnia and Herzegovina. There are 224 leisure activity businesses providing products and services for tourists, these businesses were reduced by almost half when a measurement of 'direct tourism engagement and employment' was applied.



Tourism Industry Structure

6 Sectors & 23 subsectors
3,193 Tourism businesses
709 Hotels & accommodation units
697 Restaurants
400 Café and pubs
262 Travel agents
82 Tour operators

Number of People Employed in Each Sector

Accommodation: 10,596
Restaurants: 10,345
Café and Pubs: 4,000
Travel Services: 1,145
Transport: 966
Leisure Activities: 2,240

HUMAN CAPITAL SUPPLY 2021-2027

For the future development of tourism in Bosnia and Herzegovina, the tourism and hospitality education and training systems must be innovative and be adapted to the needs of the tourism industry. Education and training are of great importance for the future development of tourism in a country. Human capital is an essential component in the delivery of tourism experiences. In the assessment of the education and training of human capital for the tourism sectors, three levels have been identified:

1. Secondary Education Schools
2. Universities and Colleges
3. Adult Learning Centers

There are 79 institutions that provide education and training in tourism and hospitality. Of the 79, 13 are universities, 54 are Secondary Technical and Vocational Schools, and 12 are adult learning centers. Additionally there are 18 public and 4 private vocational schools registered to offer adult learning programs.

No Education Institutions

13 Universities and Colleges
54 Secondary Vocational Schools
12 Adult Learning Centers

10,400 - Total graduates from 2021-2027 that are anticipated to join the tourism industry

Based on the high human capital demands of the tourism industry projected 2021-2027, this report also considers the total supply. Surveys were completed with educational institutions that currently offer tourism and hospitality programs to understand whether Bosnia and Herzegovina has the facilities to train the employees necessary to work in an expanded tourism industry. This assessment serves as an approximate baseline of the total supply of hospitality sector employees in Bosnia and Herzegovina between 2021-2027. In 2019, it was estimated that 17,810 students and adult learners were enrolled on programs in Secondary Technical and Vocational Schools, Universities, Colleges and Adult Learning Centers. A total of 15,520 graduates are projected from 2021 to 2027. Of these graduates and adults on programs, many will not go on to work in the tourism industry. This may be due to cultural factors, perception of the industry, lack of skills, and graduates being attracted to

other industries or countries, such as EU countries which offer significantly higher salaries and benefits. This leaves total supply for the projection period at 10,400 employees.

Overarching Need for Education Institutions to Better Prepare Graduates

There is an overarching need for education institutions to better prepare graduates for the realities of the globalized market and changing workforce demands and requirements. Students must become agile-learners that are capable of critical-thinking and problem solving. The assessment recommends addressing education needs in the following main areas:

- 1) Schools and universities need to increase enrollment on programs.
- 2) Curriculum needs to be strengthened and updated to match industry needs.
- 3) Curriculum needs to be designed to facilitate electives studies
- 4) Teaching methods need to be improved.
- 5) Teachers need to update their knowledge of tourism.
- 6) Training and teaching resources need to be improved.
- 7) Education institutions need to strengthen international partnerships.
- 8) Internship opportunities need to be provided for graduates.
- 9) Practical placement experience strengthened in programs.

GAP ANALYSIS: SUPPLY AND DEMAND

As more tourists visit Bosnia and Herzegovina, the tourism industry will continue to expand and demand for employees across the subsectors will increase. The year of 2019 was used as the baseline to identify what the human capital complement was before the COVID-19 pandemic closed down the tourism and hospitality industry. In 2019, the tourism industry employed 30,422 people across six major tourism sectors. Recovery to the 2019 baseline number of employees followed by growth of the tourism industry is projected to be in two phases:

Phase 1: Recovery Phase – 2021 - 2023, and

Phase 2: Growth Phase - 2024 – 2027.

Phase 1: By end of 2023, it is forecasted that the tourism and hospitality sectors will return to the 2019 level of employment, that is 30,422 employees. The total demand gap has to include the fact that 20% of the baseline employees will not return to the tourism industry. It is forecasted that **6,100** (1,800 in 2021 + 4,300 in 2022 & 2023) will not return to tourism careers or jobs. Many will seek new careers or professions outside of tourism or may opt to take job opportunities in neighboring countries, such as Croatia and /or EU for much higher salaries which is a serious challenge.

Phase 2: From 2024 – 2027 the number of tourism employees is expected to increase by **12,400** (6,200 in 2024 -2025 + 6,200 in 2026 - 2027) through to 2027, as hotels will increase room occupancy and tourism sector businesses will expand and improve services and products. The total demand for human capital in Phase 1 and 2 will be **18,500 positions**.

A total of **17,810** students and adults will join programs in tourism education and training programs, however, only half will pursue careers in the tourism industry. Total projected supply is **10,400** graduate employees that will go on to join the tourism industry. The projections of human capital demand – supply gap from 2021 to 2027 is estimated at 8,100 more employees needed to meet recovery and growth demand over the next 7 years.

The following table tabulates the demand, supply, and gap:

Demand, Supply, and Human Capital Gap – 2021 – 2027

Sector	Projected Demand				
	Employees				
	Baseline 2019 Employees	2020/2021- (Low recovery)	2022 – 2023 (Med - High recovery)	2024 - 2025 Plus 20% increase on 2019 (approx.)	2026-2027 Plus 20% increase on 2019 (approx.)
Tourism Services	1,145	114 (10%)	1,031 (90%)	260	260
Tourism Transport	966	96 (10%)	870 (90%)	200	200
Tourism Accommodation	10,596	2,119 (20%)	8,477 (80%)	2,120	2,120
Food and Beverage Businesses	14,755	5,900 (40%)	8,855 (60%)	2,940	2,940
Tourism Attractions	720	144 (10%)	576 (90%)	140	140
Leisure Activities	2,240	448 (20%)	1,792 (80%)	540	540
Total Demand	30,422	8,821	21,601	6,200	6,200
Projected Demand Based on Filling Employee Gap (2021 – 2027) and Projected Growth					
Re-employed from pre COVID-19 (80% re employed)		7,000	17,300	6,200	6,200
Shortfall (Human Capital loss to industry)		1,800	4,300		
Demand - Employees required 2021 – 2027		1,800	4,300	6,200	6,200
Total Demand – Employees					18,500
Projected Supply					
Total supply from Education & Training		2,600	2,600	2,600	2,600
Total Supply provided 2021-2027- (rounded)					10,400
Gap - Demand for Employees and Supply from Education & Training Providers					8,100

Projected demand for human capital – 2024 – 2027

In 2019 human capital turnover was a consistent trend across the industry. Turnover was primarily a result of employees leaving in search of better benefits and salaries and being attracted by offers from neighboring Croatia and other EU countries.

Demand for new employees due to labor turnover/replacement/employees not returning to the industry following COVID-19 recovery is projected to be 20%, the highest in the tourism accommodation and food and beverage service subsectors. This is unsurprising due to the fact that turnover rates are highest across hotels and restaurants and that such establishments require a greater number of employees.

Croatia is in need of 5,000 workers

Every major travel company is currently short of several hundred workers.

As there are no people on the domestic market, because a good part of the seasonal workers have fled to other sectors due to the COVID-19 pandemic, all hopes are placed on foreign labor, primarily workers from Bosnia and Herzegovina. According to the Ministry of the Interior of Croatia, there are currently almost 5,000 applications for work permits in the process.

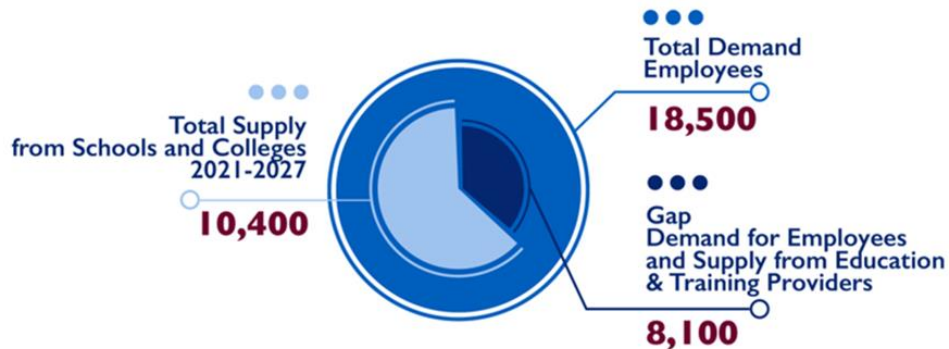
Source: NI Croatia - June 27, 2021

<https://ba.n1info.com/regija/hrvatskoj-nedostaje-5-000-radnika-za-ljetnu-sezonu/>

Supply of graduates and trained adults for human capital pool

Of these graduates, only 50% will go on to work in the hospitality and tourism industry; this may be due to cultural factors, perception of the industry, lack of skills, and graduates being attracted to other industries or countries. This leaves total supply for the projection period 2021 – 2027 at 10,400 graduate employees.

8,100 required to Bridge Human Capital Gap 2021 – 2027



TOURISM TRAINING NEEDS ANALYSIS

Overall, levels of formal training at the managerial level were high across the tourism industry. The sector with the lowest level was the restaurant and cafes sector, partly because of the high numbers of family-owned and owner-run businesses. Levels of formal training received prior to being hired are relatively low in the tourism industry with only 18% of the employees being formally educated. The sector with the highest number of formally trained employees is the tourism attraction sector and tourism services sector, reporting that 50% of their employees are formally trained. Approximately 38% of the tourism industry's workforce is multi-skilled, meaning that they are trained and carry out more than one job within the same business subsector.

Regarding commitment to training (on-the-job training), only 16% had a formal training plan for their employees in place. Only 8% had allocated a budget for training. The hotel and restaurant sectors were the ones with the highest instances of training plans in place; 60% of hotels had a training plan and around 40% of them had a training budget. It is clear from these assessment findings that, despite the recognition across sectors that education and training are essential for productivity and professionalism, there has been relatively little effort to implement in-house training programs or to send employees to training courses.

Human capital training needs by tourism subsectors

Establishments in the industry all expressed that their employees need further training in various skills, as listed below, however very few had training plans or a training budget in place to address these needs.

Top 20 Identified Training Needs

Administration and Management

1. Accounting methods and controls
2. Sales and marketing skills
3. Quality control systems for tourism businesses
4. Supervisory management skills
5. Train-the-trainer programs

Food and Beverage

6. Bar operation and management
7. Service skills in food and beverage
8. Basic culinary skills for small businesses
9. Menu design and planning
10. Wines and cocktails
11. Skills in pastry and bakery

Communication and Guest Courtesy

12. Communication techniques
13. English or European language skills
14. Etiquette and customer service
15. IT/internet use and skills

Tourist Safety

16. Fire, safety and security and first aid
17. Health and hygiene standards

Housekeeping

18. Housekeeping training for unskilled employees

Other

19. Tour guiding (to include nature guiding, storytelling, cultural history, and adventure guiding)
20. Museum's archiving

PURPOSE, OBJECTIVES AND METHODOLOGY

I. PURPOSE, OBJECTIVES AND METHODOLOGY

I.1 PURPOSE

Due to the development that the tourism industry will be experiencing as travel recovers and destinations open for business, more and more qualified employees will be required. Levels of professionalism and skill must improve to heighten the standards of service and products. The purpose of this report is to provide a detailed overview of the status of human capital in the tourism industry in terms of human capital required, training received both before and after being hired, and to assess the needs of the industry in terms of education and training programs for the future. The report draws upon baseline tourism data from 2019 and forecasts from 2021 to 2027.

I.2 DEFINING HUMAN CAPITAL

Human capital is a relatively intangible asset. It can be classified as the economic value of a worker's experience and skills. This includes assets like education, training, intelligence, skills, and loyalty. The concept of human capital recognizes that not all labor is equal. Nevertheless, employers can improve the quality of that capital by investing in employees, education, experience, and abilities. Human capital has economic value for employers and for the tourism economy as a whole. Human capital is important because it is perceived to increase productivity and thus profitability of businesses. The more a tourism business invests in its employees (i.e., in education and training), the more productive and profitable it could be.

I.3 OBJECTIVES

The Tourism Human Capital Needs Assessment and Forecast report was conducted to give industry representatives, investors, project managers, educators, and experts a clearer picture of the status of employment across the tourism industry and to emphasize the importance of having well-educated employees that are trained while on the job.

The report also identifies gaps in the supply of professionals required to support existing and developing tourism and hospitality businesses and the most immediate training needs of the tourism industry. The assessment and recommendations formulated in the report will contribute to the preparation of plans for human capital development in the tourism and hospitality sectors across BiH and inform tourism development strategies of District of Brcko, Federation of Bosnia and Herzegovina, and Republika Srpska. Therefore, its specific objectives aim to:

- Quantify the number and characteristics of people working directly in the tourism sectors,
- Quantify the number of students studying or adults training in tourism programs,
- Identify the knowledge and skill level gaps within the workforce,
- Identify the education and training needs in the tourism sectors.

Report Objectives

Quantify:

- Numbers and characteristics of people working in tourism,
- Number of students studying or training in tourism and hospitality institutions or programs.

Identify:

- Skill and knowledge levels of current tourism employees,
- Skill and knowledge gaps within the work force,
- Education and training needs in the tourism sectors.

Evaluate:

- Current education and training provisions both by institutions and by employers.

I.4 STRUCTURE

The report is organized by the following chapters:

1. Purpose, objectives, and assessment methodology
2. Year 2019 as a baseline to assessing human capital needs
3. Human capital demand in 2019
4. Human capital supply 2021-2027
5. Gap analysis: supply and demand
6. Tourism training needs analysis
7. Strategic issues and recommendations for human capital development

I.5 METHODOLOGY

Sector Specific Surveys

This report was based on the results of several sector-specific surveys that were conducted from March to May 2021. The questionnaires asked similar questions and were designed to be more specific to the tourism industry sectors. Overall, each questionnaire collected information about the following:

- The number of employees, their gender, and age group.
- The level of staff turn-over in the major sectors.
- In-house training plan and budget allocated for human capital development.
- The types of training provided for employees.
- Priority training needs required for the future years.

The questionnaires were distributed to 1,234 accommodation providers, restaurants, tour operators, handcraft outlets, travel agents, other tourism service providers, and 77 education providers. Personal interviews were also conducted with a selected sample of these businesses and institutions to cross-check and verify the data provided, especially the qualitative responses from these sectors. From the sample, the data was extrapolated to provide percentages for the entire industry. Table I.1 outlines the questionnaire sample and responses

Research Based on Multiple Sources

Multiple sources of data were used to compile data presented in the report. Official statistics were accessed from the Agency for Statistics of Bosnia and Herzegovina, Institute for Statistics of Federation of Bosnia and Herzegovina, Institute for Statistics of Republika Srpska, and Department for Statistics of Brčko District.

Data was collated from statistical reports on secondary education, labor market and registered businesses. Given the variable collection and reporting methodologies, data was processed and analyzed to extract estimations, which were then compared against tourism data such as the UNWTO Compendium for 2019 and WTTC Economic Impact Report 2021 for BiH.

Table I.1 – Questionnaire Survey Sample and Response Rate

Assessment Survey	Number of Surveys Circulated	Response Rate:
Industry Sectors (Demand)		
Hotels and Motels	262	31.68%
Restaurants	416	23.80%
Handicrafts and Souvenir Outlets	50	58.00%
Travel Agents and Tour Operators	296	17.23%
Apart Hotels and Suite Hotels	15	53.33%
Tourism Campsites	22	36.36%
Tourist Hostels	29	44.83%
Car Rentals	34	38.24%
Museums	35	25.71%

Tourism Sites and Attractions	18	33.33%
Tourism Organizations and Offices	57	47.37%
Total – Industry Surveys (Demand Side)	1,234	28.04%
Providers of Tourism Education and Training (Supply Side)		
Higher Education Institutions	12	58%
Secondary Technical and Vocational Schools	53	38%
Centers for Adult Learning	12	33%
Total – Supply	77	40%

Restaurants were defined as establishments where the on-site production and service of food is the main business activity; pubs were included as food and beverage serving businesses.

Tourism services comprise of tour operators and travel agencies. Tourist attractions include a wide range of attractions from heritage sites to adventure tourism businesses.

Employment numbers for the travel and transport sector are difficult to determine definitively given the sector's varied subsegments and wide-ranging, often overlapping activities. This has fostered various estimation approaches to measuring sector employment.

Universities and colleges offering tourism and hospitality programs were surveyed and asked specific questions as follows:

- Number and gender of students,
- Marketing of programs (i.e. brochures, career fairs, internet, etc.),
- Courses and modules offered to students,
- Facilities available to students (i.e. libraries, computer labs, language labs, etc.),
- Level of qualification among staff members and professors,
- Internship opportunities offered to student.

Sample survey questionnaires are included in Appendix A.

Focus Groups

The focus group research included five groups representing the private sector (hotels, motels, restaurants, travel agencies, and tour operators) and the public sector (national parks, tourism organizations, schools, and higher education institutions). Over 30 participants took part in focus groups which were held online in May 2021.

The discussion was conducted based on a pre-defined agenda.

Focus Group 1: Business representatives from the accommodation sector (hotels, motels, hostels, and others). Participants represented businesses in Sarajevo, Teslić, Mostar, Trebinje, Jahorina, and Banja Luka.

Focus Group 2: Included representatives from restaurants and catering establishments from Sarajevo, Mostar, Brčko, and Maglaj.

Focus Group 3: Included representatives from travel agencies and tour operators from Sarajevo, Mostar, Konjic, and Banja Luka.

Focus Group 4: Included directors, deans, professors, and teachers from adult learning centers, higher education institutions, and secondary vocational schools from Sarajevo, Mostar, Pale, and Trebinje.

Focus Group 5: Included representatives from tourist boards, museums, national parks, and public institutions for tourism development and protection of cultural and historical and natural heritage. Organizations represented were from Stolac, Sarajevo, Mostar, Prijedor, and Banja Luka.

Assessment focused on direct employment – The assessment focused on direct employment and excluded indirect and induced employment. Human capital assessment excluded air travel,

airport operation, railway operation, general water transport (except for river rafting and boating), urban and suburban passenger transport, fitness centers, and other general sports activities. Direct employment is a more precise impact measurement on impact of tourism and direct contribution of tourism to gross domestic product as presented in the UN World Tourism Organization – Tourism Satellite Accounts (UNWTO – TSA).

Data sources and benchmarking – The assessment drew on a wide range of published data both from government sources, entity authority sources, and the Agency for Statistics of Bosnia and Herzegovina. UNWTO and WTTC data published with reference to Bosnia and Herzegovina was applied to benchmark human capital primary sourced data.

YEAR 2019 AS A BASELINE TO ASSESSING HUMAN CAPITAL NEEDS

2. YEAR 2019 AS A BASELINE TO ASSESSING HUMAN CAPITAL NEEDS

There are six main tourism sectors and 23 subsectors, of which there are 3,193 businesses currently operating in BiH. Approximately 66% of businesses are located in the Federation of Bosnia and Herzegovina, 33% in the Republika Srpska, and 1% in Brcko. Tourism accommodation and food and beverage services are major sectors together with tourism transport.

2.1 OVERVIEW OF BOSNIA AND HERZEGOVINA'S TOURISM INDUSTRY

Bosnia and Herzegovina's tourism industry is one of the driving forces of the country's economy. According to the UNWTO, tourists spent an average of 2.02 nights in Bosnia and Herzegovina in 2019. Tourism receipts generated US \$1.226 billion. Table 2.1 details key statistics for 2019:

Table 2.1: Tourism statistics of Bosnia and Herzegovina 2019

Statistics	2019
Total tourists' arrivals, staying overnight	1,198,000
Tourist travelling on package tours	466,000
Average length of stay (nights)	2.02
Number of tourist accommodation establishments for tourists	700
Number of tourist accommodation rooms available	18,626
Tourism expenditures (million US\$)	US\$ 1,226,000,000

Source: UNWTO – Compendium of Tourism Statistics (2020)

As reported by WTTC, tourism resulted in the employment of 86,800 people through direct, indirect, and induced jobs. WTTC includes all travel and tourism sectors in its reporting. Of these jobs it was estimated that 30,300 people were employed in direct jobs excluding airlines, sea, and rail travel subsectors. According to the BiH Agency for Statistics, the number employed in the accommodation and food and beverage services subsectors in 2019 was estimated to be 42,500.

WTTC reporting on the number of jobs in tourism and travel sectors

WTTC reports that Bosnia and Herzegovina's travel and tourism sector created 86,800 direct, indirect, and induced jobs in 2019, equivalent to 10.5% of total employment. The WTTC Report also stated that tourism and travel employment decreased to 68,400 in 2020, a drop of 18,400 direct, indirect, and induced jobs or 21.2%.

WTTC 2021 Annual Research, published March 2021

2.2 TOURISM SECTORS, AND SUBSECTORS

Tourism business in BiH is divided into six business sectors, detailed in Table 2.2.

Table 2.2: Breakdown of public and private industry sectors and subsectors

Main Sectors	Subsectors
Tourism Services	Travel Agencies, Tour Operators, Tour Guiding
Tourism Transport	Car Rental, Tourism Coach/Bus Companies
Tourist Accommodation	Hotels and Motels, Apartment Hotels/Suites, Guest Houses, Camps and Hostels
Food and Beverage	Restaurants, Coffee Shops, Pubs, Fast Food and Event Catering Venues
Tourism Attractions	Archaeological Sites, Museums and Galleries
Leisure Activity Providers	Adventure and Ski Centers, and Water Sports

Table 2.3 below provides a breakdown of the six main tourism sectors, 23 subsectors, and 3,193 businesses currently operating in BiH.

Table 2.3: Number of tourism businesses by sector, and entity/district in 2019

Tourism Sectors	Number of Business by Entities/District				
	FBIH	RS	Brčko	Total	%
Tourism Travel Services					
Travel Agencies	216	45	1	262	
Tour Operators	53	28	1	82	
Other Reservation/Booking Services	19	7	1	27	
Sub Total – Tourism Travel Services	288	80	3	371	11%
Tourism Transport					
Urban And Suburban Passenger Transport (incl rail)	63	36	3	102	
Tourism Taxi Operators	53	17		70	
Other Passenger Land / Water Transport	195	121	6	322	
Car Rental Companies	189	56	5	250	
Sub Total - Tourism Transport	500	230	14	744	24%
Tourism Accommodation					
Hotels , Hostels, Motels Guest Houses etc.	336	205	3	544	
Holiday - short-stay accommodation (Self Catering)	56	50		106	
Camping, recreational vehicle & trailer parks & other	48	11		59	
Sub Total - Tourism Accommodation	440	266	3	709	22%
Food And Beverages Services					
Restaurants Businesses	511	181	5	697	
Event Catering Venues & Food Service Businesses	12	7	1	20	
Beverage Serving Businesses	250	147	3	400	
Sub Total - Food and Beverages Services	773	335	9	1,117	35%
Tourism Attractions					
Museums	11	11		22	
Historical Sites and Visitor Attractions	1	2		3	
Botanical & Zoological Gardens & Nature Reserves	3	0		3	
Sub Total – Tourism Attractions	15	13	0	28	1%
Tourism Leisure Activities					
Sports Facilities for Tourists	32	35		67	
Fitness Centers	24	5	1	30	
Other Sport Activities	12	10	1	22	
Amusement Parks and Theme Parks	8	2		10	
Other Amusement and Recreation Activities	33	17		50	
Conventions and Trade Show Businesses	29	14	1	44	
Sub Total – Tourism Leisure Activities	138	83	3	224	7%
Total Businesses in Tourism by Region	2,154	1,007	32	3,193	
Distribution of Businesses / Region Entities (%)	66%	33%	1%	100%	

Note: # estimated - Source: Entity Ministries of Tourism (categorization of accommodation), and the statistical institutes of entities (tourism reports, registrars of businesses) Data, 2019

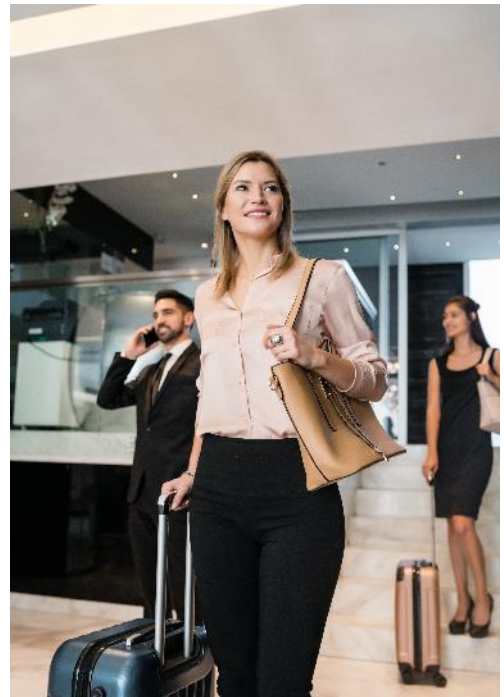
2.3 TOURISM SECTORS PROVIDING DIRECT EMPLOYMENT

The total tourism activity providers registered in 2019 comprised of 709 tourism accommodation entities, 262 travel agencies, 697 tourist restaurants, 250 car rental providers, and 82 tour operators. The number of classified hotels in 2019 comprised of: 16 five-star hotels, 198 four-star hotels, 102 three-star hotels, and 89 two- and one-star hotels.

Most of the tourism businesses, approximately 64%, are either family-run or owner-managed. This percentage is especially high in the hotel apartments, restaurant, cafes, and travel agencies subsectors of the industry. Approximately 80% of tourism archaeological sites are managed by government organizations or managed through private trusts. The remaining 20% of the tourism attractions, such as small museums and art galleries, are privately owned.

Tourism businesses are heavily concentrated in the Federation of Bosnia and Herzegovina with 66% of all businesses, which has 61% of all hotels and 82% of restaurants. Such a concentration is partly explained by the high population in Sarajevo and the tourism infrastructure developed in the Mostar area, which are both part of the Federation of Bosnia and Herzegovina region.

Tourism businesses are heavily concentrated in the Federation of Bosnia and Herzegovina Entity, which has 61% of all hotels and 82% of restaurants.



HUMAN CAPITAL EMPLOYED IN 2019

3. HUMAN CAPITAL EMPLOYED IN 2019

Tourism is one of the largest employers in Bosnia and Herzegovina's economy, directly employing 30,422 people. In addition, as projected by WTTC tourism in Bosnia and Herzegovina created an additional 56,500 indirect and induced tourism related jobs (WTTC, 2021).

Food and beverage service businesses and restaurants employed the most people at 48%. The accommodation subsector, comprising of hotels, apartment hotels, camping and other forms has the next highest employment at approximately 35% and tour operators and travel agents account for 5%.

Table 3.1 elaborates upon the total number of employees by main tourism sectors.

Table 3.1: Total employee numbers by subsectors

Main Tourism Sectors	No of Direct Employees 2019/ 2020		
	Sub Sector	Total	%
Tourism Travel Services	Travel Agencies, Tour Operators, Other Reservation/Booking Services	1,145	5%
Tourism Transport	Passenger Land Transport including Tourist Buses, Car Rental Companies for Tourists	966	3%
Tourism Accommodation	Hotels Holiday and other Short-stay Accommodation Camping, Recreational Vehicle Parks & other	10,596	35%
Food and Beverages Services	Restaurants, Event and Conference Catering, Beverage Services (including pubs & coffee shops)	14,755	48%
Tourism Attractions	Museums Historical sites and visitor attractions Botanical & zoological gardens & nature reserves	720	2%
Tourism Leisure Activity Providers	Sports and Adventure Business for Tourists Amusement Parks and Theme Parks Conventions and Trade Shows Businesses	2,240	7%
Total Employees by Sectors		30,422	100%

Numbers are rounded up to whole numbers. Source: BiH relevant authorities, and UNWTO (2020) Compendium of Tourism Statistics Dataset for Bosnia and Herzegovina, published October 20, 2020. Also aggregated statistics based on Assessment Survey.

The Federation of Bosnia and Herzegovina (comprising the capital Sarajevo) accounts for the most employees at 66%, followed by the Republika of Srpska at 33% and District Brcko with 1% of employees in tourism.

Table 3.2 details the distribution of tourism employees by Entity and sectors.

3.1 DIRECT EMPLOYMENT IN TOURISM SECTORS AND ENTITIES

Total direct human capital employment in all sectors is 30,422. In Entities, 20,138 (66%) are employed in the Federation of Bosnia and Herzegovina, 9,880 (33%) in the Republika Srpska and 404 employed in District of Brčko. Full details are presented in Table 3.2. below

Table 3.2: Employment / Tourism Sectors / Subsector / Entity in 2019

Tourism Sectors	No of Direct Employees/ Entity 2019/ 2020				
	FBIH	RS	Brčko	Total	%
Tourism Travel Services					
Travel Agencies	674	106	2	782	68%
Tour Operators	190	90	5	285	25%
Other Reservation/Booking Services	56	20	2	78	7%
Sub Total – Tourism Travel Services	920	216	9	1,145	5%
Tourism Transport					
Tourism Taxi Operators	103	34		137	14%
Passenger Land Transport including Tourist Buses	390	234	13	637	66%
Car Rental Companies for Tourists	187		5	192	20%
Sub Total - Tourism Transport	680	268	18	966	3%
Tourist Accommodation					
Hotels	5,467	2,887	57	8,411	80%
Holiday and other Short-stay Accommodation	686	1,204		1,890	18%
Camping, Recreational Vehicle Parks & other	240	55		295	2%
Sub Total - Tourism Accommodation	6,393	4,146	57	10,596	35%
Food And Beverages Services					
Restaurants	7,665	2,715	75	10,455	72%
Event and Conference Catering Businesses	180	105	15	300	1%
Beverage Businesses (including pubs & coffee shops)	2,500	1,300	200	4,000	27%
Sub Total - Food and Beverages Services	10,345	4,120	290	14,755	48%
Tourism Attractions					
Museums	220	220		440	61%
Historical sites and visitor attractions	80	80		160	22%
Botanical & zoological gardens & nature reserves	120			120	17%
Sub Total – Tourism Attractions	420	300		720	2%
Tourism Leisure Activity Providers					
Sports and Adventure Business for Tourists	680	500	20	2,200	53%
Amusement Parks and Theme Parks	410	190		600	27%
Conventions and Trade Shows Businesses	290	140	10	440	20%
Sub Total - Tourism Leisure Activity Providers	1,380	830	30	2,240	7%
Total Employees by Businesses/ Regions	20,138	9,880	404	30,422	100%
Distribution of Employees/ Region Entities (%)	66%	33%	1%		

Source: Ministries of Tourism and the Entity Institutes for Statistics, Tourism data, 2019 & Numbers are rounded up to whole numbers.

Gender of Employees Working in Tourism Sectors

Women make up 42% of the tourism industry's workforce; an approximate 12,638 women are employed in the various sectors of the industry. Most women are employed in the accommodation and food and beverage sectors, while the tourism transportation sector employees the least number of women.

Table 3.3 below provides further gender disaggregated data in the tourism industry by sector.

Table 3.3: Gender of Employees Working in Tourism Sectors.

No of Direct Employees/Sector / Gender						
Tourism Sectors	Sub Sector	Male		Female		Total
		No	%	No	%	
Tourism Services	Travel Agencies, Tour Operators, Other Reservation/Booking Services	424	37%	721	63%	1,145
Tourism Transport	Passenger Land Transport including Tourist Buses, Car Rental Companies for Tourists	753	78%	213	22%	966
Tourist Accommodation	Hotels, Short-stay Accommodation Camping, RV Parks & other	6,252	59%	4,344	41%	10,596
Food and Beverages Services	Restaurants, Event and Conference Catering, Beverage Services (including pubs & coffee shops)	8,853	60%	5,902	40%	14,755
Tourism Attractions	Museums, Historical Sites Botanical & Zoological Gardens & Nature reserves	382	53%	338	47%	720
Tourism Leisure Activity Providers	Sports and Adventure Business for Tourists Amusement & Theme Parks Conventions & Trade Shows Businesses	1,120	50%	1,120	50%	2,240
Total Employees by Gender		17,784	58%	12,638	42%	30,422

Source: Aggregated from survey assessment results & Numbers are rounded up to whole numbers.



3.2 SECTORS AND LEVELS OF EMPLOYMENT

Table 3.4. shows the percentage of permanent workers that are employed at various levels within each sector. It is important to note that, aside from those permanently employed in the tourism industry, several thousand non-permanent employees work on a needs basis and are therefore hard to assess and quantify. Most are relatively unskilled and work primarily as casual service staff, cleaners, and maintenance staff.

Table 3.4: Sectors and Levels of Employment

Main Sectors	Permanent Human Capital								
	Management		Supervisory		Skilled Operative		Non-Skilled Operatives		Total employed
	No.	%	No.	%	No.	%	No.	%	
Tourism Services	57	5	114	10	917	80	57	5%	1,145
Tourism Transport	48	5	96	10	812	84	10	1%	966
Tourist Accommodation	1,060	10	1,060	10	8,265	78	211	2%	10,596
Food and Beverages	1,475	10	2,952	20	9,590	65	738	5%	14,755
Tourism Attractions	36	5	72	10	598	83	14	2%	720
Tourism Leisure Activity	224	10	336	15	1,635	73	45	2%	2,240
Total Employed/position/sectors	2,900		4,630		21,817		1,075		30,422
Total %	25%				72%		3%		100%

Source: Aggregated from survey assessment results

Table 3.4. shows that 7,530 (25%) are holding management or supervisory positions, 21,817 (72%) are employed as skilled operative employees and 3% are in non-skilled operatives. This is a 5:1 operative to management ratio, which is deemed high in international estimates.

3.3 EMPLOYMENT IN TOURISM ACCOMMODATION SUBSECTORS

In 2019 there were an estimated 709 tourism accommodation providers in Bosnia and Herzegovina, employing 10,596 employees. The accommodation is structured in seven (7) sub sectors, detailed in Table 3.5 as follows:

Table 3.5: Tourist Accommodation Sub Sectors and Number of Businesses

Sub Sector	No Businesses
Hotels	405
Hostels	84
Motels	63
Apartment Hotels	56
Guest Houses	28
Resorts	14
Campsites & other	59
Total	709

Source: Aggregated from survey assessment results

There are 405 hotels registered and graded in the Entities of the Federation of Bosnia and Herzegovina, Republika Srpska and Brcko District. Hotels are the largest provider of accommodation, with hotels graded from 5-star to 1-star. Hotels also employ 80% (8,411) of all those employed in the sector.

In 2019 there were an estimated 56 registered apartment hotels in Bosnia and Herzegovina. Apartment hotels are a growing part of the accommodation sector that offer self-catering accommodation, providing a kitchen and bathroom to guests while also having a reception and cleaning service.

There were 84 registered hostels in 2019, but an increasing number of unregistered businesses cater to the growing number of independent travelers.

The assessment found that around 90% of all apartment hotels, hostels and campsites were family-owned or owner-managed. Table 3.6. below details the number of establishments available and the number of employees by Entity.



Table 3.6: Employment / Tourism Accommodation Subsector / Entity in 2019

Sub Sector -Type of Accommodation	Total business	No Employed	%	Employees by Entity/Region				Brcko	%
				FBIH	%	RS	%		
Hotels	405	8,411	80%	5,467	65%	2,887	34%	57	.7%
Hostels	84	420	4%	151	36%	269	64%		
Motels	63	630	7%	76	12%	554	88%		
Apart Hotels	56	560	5%	319	57%	241	43%		
Guest Houses	28	140	1%	70	50%	70	50%		
Resorts	14	140	1%	70	50%	70	50%		
Campsites & other	59	295	2%	240	12%	55	88%		
Total	709	10,596		6,393		4,146		57	
% Distribution of Employees / Entity				61%		39%			

Numbers are rounded up to whole numbers

Note: Brcko had 3 tourist accommodation businesses.

Source: Relevant Authorities and UNWTO (2020) Compendium of Tourism Statistics Dataset for Bosnia and Herzegovina, published October 20, 2020

3.3.1 Employment in Hotel Accommodations Sector

The total number of hotels in operation in 2019 was 405 in Bosnia and Herzegovina. Of these hotels, sixteen were 5-star. A number of these hotels are branded by international companies, including Marriot and ACCOR. Table 3.7 provides further details regarding the number of hotels in the Entities of the Federation of Bosnia and Herzegovina and the Republika Srpska.

Table 3.7.: Hotel Grade, Number of Hotels located in Entities

Hotel Grade 405 hotels	Total business	%	Hotels/ by Grade/ by Entity/Region		
			FBIH	RS	Brcko
5 Star Hotels	16	4%	11	5	
4 Star Hotels	198	49%	124	74	
3 Star Hotels	102	25%	53	46	3
2- & 1-Star Hotels	89	22%	72	17	
Total	405	100%	260	145	3
Hotels / Entity / %			64%	36%	

Source: Entity Ministries of Tourism & Aggregated from survey assessment results

The hotel accommodation sector is the largest employer in the tourism accommodation sector. The estimated total number of people permanently employed by the hotel sector in 2019 was 8,411. Approximately 65% (5,467) were employed in the Federation of Bosnia and Herzegovina and 34% (2,887) were employed in hotels located in the Republika Srpska. Most of the smaller 3, 2, and 1 star hotels are either family-owned or owner-managed. Table 3.8. details the distribution of hotels in Entities:

Table 3.8.: Hotel Grade, No Hotels & Bedrooms and Employees located in Entities/District

Hotel Grade (405 hotels)	Total business	No Bedrooms	No Employees	No Employees/Grade/ Entity/District		
				FBIH	RS	Brcko
5 Star Hotels	16	1,981	1,981	1,347	634	
4 Star Hotels	198	5,940	4,455	2,762	1,693	
3 Star Hotels	102	3,060	1,530	780	693	57
2 & 1 Star Hotels	89	1,780	445	356	89	
Total	405	12,761	8,411	5,467	2,887	57
Hotels / Entity/District / %				65%	35%	

Source: Entity Ministries of Tourism & Aggregated from survey assessment results

Managers in the hotel sector note ‘that the challenges for hotel industry include the scarcity of qualified employees, in addition to high turnover rates.’

3.3.2 Employment in ‘Other Tourism Accommodation’ Subsectors

The number of people employed in the ‘other accommodation’ sector was approximately 2,185 in 2019, representing 20% of the total tourism accommodation human capital. Table 3.9. below shows the number of people employed in each specific accommodation type, excluding hotels, and location of their employment.

Table 3.9: Numbers of full-time employees working in the ‘other accommodation’ sector in 2019

Sub Sector - Type of Accommodation	Total business	No Employed	%	Employees by Entity/Region			
				FBIH	%	RS	%
Hostels	84	420	20%	151	36%	269	64%
Motels	63	630	30%	76	12%	554	88%
Apart Hotels	56	560	27%	319	57%	241	43%
Guest Houses	28	140	6%	70	50%	70	50%
Resorts	14	140	6%	70	50%	70	50%
Campsites & other	59	250	11%	240	26%	55	74%
Total	304	2,185		926		1,259	
% Distribution of Employees / Entity				59%		41%	

i. Numbers are rounded up to whole numbers

ii. Note: District of Brcko had 3 tourist accommodation businesses.

iii. Source: Relevant Authorities and UNWTO (2020) Compendium of Tourism Statistics Dataset for Bosnia and Herzegovina, published October 20, 2020

3.3.3 Number Employed in Departments of Tourism Accommodation

Table 3.10 below shows department areas of the total workforce. Almost a third of all tourist accommodation staff in Bosnia and Herzegovina are employed in food and beverage service departments; food and beverage, bar, conference/banqueting, and stewarding/backhouse account for 30% of employees. This implies that a considerable number of apartment hotels must offer a restaurant service alongside the self-catering option.

Table 3.10: Number Employed in Departments of Tourism Accommodation

Accommodation Department	%	No Employed
Manager	10%	1,060
Heads of Department/ Supervisor	7%	740
F&B Service, Bar, Conference/Banqueting, Stewarding/Back House	30%	3,180
Kitchen	14%	1,480
Front Office & Concierge	11%	1,166
Housekeeping	15%	1,590
Laundry	4%	425
Security	4%	425
Administration/Accounts, Marketing and Sales	4%	425
Human Resource Management/ Personnel	1%	105
Total	100%	10,596

Source: Aggregated from survey assessment results

Because of the family-run nature of many of these tourist accommodation establishments, human capital turnover is not a significant problem.

3.4 EMPLOYMENT IN FOOD AND BEVERAGE SUBSECTORS

The restaurant sector includes the following three subsectors:

1. Tourist Restaurants (including fast-food restaurants)
2. Event and Conference Catering Businesses
3. Beverage Serving Businesses (including Coffee Shops and Pub)

For the purposes of this survey, a restaurant was defined as a place where the on-site provision of food is the main business activity, while a fast-food restaurant was defined as an establishment where one can eat on the premises or take away food and drink through a service unit. These definitions exclude take-away only establishments, though many restaurants have now started to offer take-away services. There are 1,117 Food and Beverage Service businesses (restaurants, coffee shops, event catering and fast-food restaurants) in Bosnia and Herzegovina in 2019. An estimated 70% of these establishments are either family-run or owner-managed.

Table 3.11 below shows the regional distribution of food and beverage service employees. The Federation of Bosnia and Herzegovina accounts for the highest number of food and beverage service businesses, with 773 businesses, employing 10,345 employees followed by Republika Srpska with 335 businesses, employing 4,120 employees. Aside from the below listed permanent employees working in the food and beverage service sector, there are also an estimated 1,750 part-time employees whose level of skill and training cannot be reliably quantified.



Table 3.11: Employment / Food and Beverage Subsector / Entity in 2019

Food and Beverage Service Businesses	No Businesses	No of Direct Employees/ Entity 2019/ 2020				
		FBIH	RS	Brčko	Total	%
Restaurants and Fast-Food Service Businesses	697	7,665	2,715	75	10,455	71%
Event and Conference Catering Businesses	20	180	105	15	300	2%
Beverage Businesses (including pubs & coffee shops)	400	2,500	1,300	200	4,000	27%
Food and Beverages Services by Entity	1,117	10,345	4,120	290	14,755	
Distribution of Employees/ Entities (%)		70%	28%	2%		100%

Source: Ministry of Tourism and the Department of Statistics tourism data, 2019 & Numbers are rounded up to whole numbers.

Approximately 68% of food and beverage employees are between the ages of 24 and 40, and almost 65% of them are employed in operative grade positions (see Table 3.4.). As can be expected, the food and beverage service and kitchen sectors employ the most people. The manager to employer ratio within the sector currently stands at 1:10, a normal ratio in the restaurant sector.

3.4.1 Number Employed in Departments of Food and Beverage Service

Table 3.12. provides details about the distribution of employees in the various departments of restaurants.

Table 3.12: Number Employed in Departments of Food and Beverage Service Businesses

Distribution of Employees / Departments	Total Employees	%
Management*	1,475	10%
Food and Beverage Service	6,195	42%
Kitchen	3,100	21%
Cleaners and Stewards	2,660	18%
Cashiers	590	4%
Control/Stores	590	4%
Trainees	145	1%
Total	14,755	100%

* Management includes not only the 'management' department category, but also department managers.

All the establishments surveyed expressed a problem with labor turnover, especially in the kitchen and food and beverage service departments. This is mainly attributed to employees looking for higher wages whenever a new establishment opens or opportunities in neighboring countries entice them.

The fast-food sub sector is expanding and includes several local and one international franchise (McDonalds) as well as privately-operated fast-food outlets. In 2019 most of the fast-food outlets were in Sarajevo, but many are opening outlets in Mostar and Banja Luka.

An estimated 90% of employees in the fast-food subsector work in operational capacities such as food preparation, packaging, direct servicing and delivery. Higher-level jobs such as management, accounting, and marketing account for only 10% of employment positions.

Most businesses expressed concerns about the lack of basic skills of most of the new hires. All employees needed vocational level training in basic food and beverage production and service skills, basic English and other language training and customer communication skills.

Staff retention is a challenge. The food and beverage service sub-sector has high labor turnover rates, which managers maintain causes problems in terms of business expansion and quality standards. The food and beverage services subsector tends to attract young and unskilled employees who do not intend to turn it into a career. Furthermore, the increasingly high demand for employees within the subsector meant that employees were likely to leave their outlet in exchange for higher pay and better benefits at other new businesses or seek positions in neighboring countries, such as Croatia.

3.5 EMPLOYMENT IN THE TOURISM ATTRACTIONS SECTOR

This sector includes all historical / heritage sites, museums, and nature reserves found in Bosnia and Herzegovina. Because of the nature of the sector, most of its workforce is permanently employed. Table 3.13 details the subsectors and numbers employed.

Table 3.13: Employment / Tourism Attractions Subsector / Entity in 2019

Tourism Attractions	No Businesses	No of Direct Employees/ Entity 2019/ 2020			
		FBIH	RS	Total	%
Museums	22	220	220	440	61%
Historical sites	3	80	80	160	22%
Botanical & zoological gardens	3	120		120	17%
Employees by Attractions/ Entity	28	420	300	720	
Distribution of Employees/ Entity		58%	41%		100%

Source: Relevant Authorities & Numbers are rounded up to whole numbers.

3.6 EMPLOYMENT IN THE TOURISM SERVICES SECTOR

This sector includes inbound, outbound and domestic licensed tour operators and travel agents. Because tour guides work as individuals and not as businesses, they have been included with travel agents, or alternatively, they register themselves as businesses. Table 3.14 provides an overview of the subsectors and the number of businesses and employees for each. The subsectors employ 1,145, the majority of which are employed (68%) in travel agents. Tour operators employ 25% of the employees.

Table 3.14: Employment / Tourism Travel Services Subsector / Entity in 2019

Tourism Travel Services Subsectors	No Businesses	No of Direct Employees/ Entity 2019/ 2020				
		FBIH	RS	Brčko	Total	%
Travel Agencies (Includes Guides)	262	674	106	2	782	68%
Tour Operators	82	190	90	5	285	25%
Reservation/Booking Services	27	56	20	2	78	7%
Employees/ Tourism Services	371	920	216	9	1,145	
Distribution Employees/ Entity		80%	19%	1%		100%

Source: Aggregated from survey assessment results



Employment as a Tour Guide

It is estimated that there are approximately 1,300 tour guides in total in Bosnia and Herzegovina. The breakdown per Entity is estimated as 1,250 licensed in the Federation of Bosnia and Herzegovina and 50 licensed in the Republika Srpska. It is unknown as to how many are engaged in providing guiding services.

Procedure for obtaining a tour guide license in the Federation of Bosnia and Herzegovina.

- 1) The application process for a tourist guide exam is coordinated by the Federal Ministry of Environment and Tourism. The application requirements include secondary education qualification/diploma, minimum knowledge of one foreign language. The exam consists of 4 tests, 3 written and 1 oral part. There are no training courses, but each candidate receives a manual to prepare for the exam.
- 2) The certificate issued by the Federal Ministry of Environment and Tourism is not a license to work. The certificate is only proof that the person is qualified and trained to work in the field as a tour guide.
- 3) The certified tour guide has to register a business at the municipality of residence (activity code for a tourist guide is 79.90, other reservation services, subtype: tourist guide).
- 4) On receipt of approval to establish a business, it is necessary to collect the required documentation in order for the activity to become effective: submit an application for an ID number, statistical number, application to the municipal tax administration, bookkeeping contract, contract on renting the premises where the activity is declared (if it is not personal ownership of the premises), declare a fiscal cash register, open an account with the bank.
- 5) The complete documentation has to be submitted together with an application form for the issuance of a travel guide license to the Ministry of Economy of the relevant canton.
- 6) Monthly contributions and insurances are approx. 390.00 KM, bookkeeping services are paid, space if rented. Annual income tax is 10% of the earnings. The business is listed as a 'Legal entity'.
- 7) The activity of a tour guide is a primary occupation according to the law on tourism of the Federation of Bosnia and Herzegovina and cannot be seasonal or supplementary. Which means a guide must work independently. Another company cannot employ a guide, a guide must establish a legal entity to operate as a licensed legal guide.

It is recommended that travel agents or tour operators be permitted to engage and hire tour guides. The law should be amended to allow three options, that the tour guide profession is considered as a 'basic-constant occupation' just as currently defined by law. Alternatively, tour guides are approved as 'a supplementary-additional occupation'. Tour guides can also avail of the opportunity to be employed by a travel agency as a tour guide. Tour Guides can be members of an Association, for example, Association of Tourist Guides of Sarajevo.

Procedure for obtaining a tour guide license in the Republika Srpska

The Ministry of Trade and Tourism organizes trainings and certifies tour guides. Training is focused on lessons in history, constitutional set up of BiH, English language and general knowledge. Licencing of tour guides takes place at the level of local communities which have the liberty of prescribing additional requirements such as passing of specialized programs. These programs, where they exist, focus on the main tourist attractions in a given location. However, in practice individuals who are certified by the Ministry of Trade and Tourism as tour guides acquire licences at the local level, without any additional training or assessment.

3.7 EMPLOYMENT IN TOURISM TRANSPORT SERVICES

The tourism transport subsector includes car rental and tourism transportation companies in Bosnia and Herzegovina. While it is difficult to know exactly how many coach operators there are in Bosnia and Herzegovina, Table 3.15 provides estimated numbers for car rental and tourism transportation companies operating in Bosnia and Herzegovina in 2019. There are 744 transport businesses providing transport for tourists, including air and rail transport and urban and suburban passenger transport. The measurement of direct tourism engagement and employment was applied, resulting in 642 businesses identified.

Table 3.15: Employment / Tourism Transport Subsector / Entity in 2019

Tourism Transport Subsector	No. of Businesses	No. of Direct Employees/ Entity 2019/ 2020				
		FBIH	RS	Brčko	Total	%
Tourism Taxi Operators	70	103	34		137	14%
Passenger Land Transport including Tourist Buses	322	390	234	13	637	66%
Car Rental Companies for Tourists	250	187		5	192	20%
Employees/ Tourism Transport	642	680	268	18	966	
Distribution of Employees/ Entities (%)		70%	28%	2%		100%

Numbers are rounded up to whole numbers. Source: Aggregated from survey assessment results

In 2019, 250 car rental businesses operated across Bosnia and Herzegovina. The transport sector employed an estimated 966 employees in 2019, 80% of whom are employed permanently. Almost all employees are male, an estimated 98% of them. Around 60% of the workers are employed in operative grade positions.

3.8 EMPLOYMENT IN TOURISM LEISURE SERVICES

The tourism leisure subsector includes sports and adventure, amusement parks and convention businesses in Bosnia and Herzegovina. Due to lack of official statistics, it is difficult to estimate the number of adventure/sport providers operating in Bosnia and Herzegovina. Table 3.16 provides an estimated number of companies operating in Bosnia and Herzegovina in 2019. The number derived from official statistics was 224 leisure activity businesses providing products and services for tourists, these businesses were reduced by almost half when a measurement of ‘direct tourism engagement and employment’ was applied. The official count of leisure activity businesses included fitness centers, suburban sport facilities and activities that were designated for use by the general populations, not specifically for tourism purposes.

Table 3.16: Employment / Tourism Leisure Services Subsector / Entity in 2019

Tourism Leisure Activity Providers	No Business	No of Direct Employees/ Entity 2019/ 2020				
		FBIH	RS	Brčko	Total	%
Tourism Sports and Adventure Businesses	62	680	500	20	2,200	53%
Amusement Parks and Theme Parks	10	410	190		600	27%
Conventions & Trade Shows Businesses	44	290	140	10	440	20%
Employees / Tourism Leisure Services		1,380	830	30	2,240	
Distribution of Employees/ Entity		62%	37%	1%		100%

Source: Aggregated from survey assessment results



HUMAN CAPITAL SUPPLY 2021-2027

4. HUMAN CAPITAL SUPPLY 2021-2027

For the future development of tourism in Bosnia and Herzegovina, the tourism and hospitality education and training systems must be innovative and adapted to the tourism industry's needs. Education and training are of great importance for the future development of tourism in a country. Human capital is an essential component in the delivery of tourism experiences. Therefore, particular emphasis has to be placed on the development of teaching and training curricula to meet the requirements of the tourism industry. The following institutions can provide required training for tourism sector professionals:

1. Secondary Education Schools
2. Universities and Colleges
3. Adult Learning Centers

Based on the high human capital demands of the tourism industry projected 2021-2027, this report also considers the total supply. The assessment of teaching programs offered by these intuitions demonstrated that BiH has a cadre education professionals, framework curricula for the tourism and hospitality sector and facilities to deliver it. Surveys were completed with educational institutions that currently offer tourism and hospitality programs to understand whether Bosnia and Herzegovina has the facilities to train the employees necessary to work in an expanded tourism industry. This survey serves as an approximation baseline of the total supply of hospitality sector employees in Bosnia and Herzegovina between 2021-2027 for future projections.

In 2019 it was estimated that 17,810 students and adult learners were enrolled into programs in Secondary Technical and Vocational Schools, Universities, Colleges and Adult Learning Centers. A total of 15,520 graduates are projected from 2021 to 2027. Of these graduates and adults on programs, about 33% will not work in the tourism industry. Causes may include cultural factors, negative perception of the industry, lack of practical skills, and graduates being attracted to other industries or countries. As a result, the total supply for 2021 – 2027 will remain at 10,400 employees.



4.1 SECONDARY EDUCATION SCHOOLS

Secondary Education is organized in seven types of schools, as follows:

- Special Schools;
- Medical Schools;
- Religious Schools;
- Art Schools;
- Grammar Schools;
- Technical Schools;
- Vocational Schools.

Secondary education in the tourism and hospitality sector is organized through Secondary Vocational and Technical Schools. These schools offer 3-year programs at the vocational level and 4-year programs at the technical level. The most common are mixed Secondary Technical and Vocational Schools whose program profile is not directly recognizable in the name of the school.

There are 54 public secondary education schools offering programs in tourism and hospitality. There are 32 schools in the Federation of Bosnia and Herzegovina that offer tourism and hospitality programs, 21 in the Republika Srpska, and 1 in the Brčko District. Most of the Secondary Technical and Vocational Schools are combined to offer four-year (tourism technician, hospitality technician, culinary technician) and three-year (cook, waiter, confectioner) vocational programs. Five schools only offer technician - four-year programs and 16 schools provide only three-year vocational programs. Most schools offer both 3- and 4-year programs (33 schools). Also, 7 schools (3 in FBiH and 4 in RS) offer vocational programs in confectionary. In addition, 18 of the Secondary Technical and Vocational Schools offer adult learning programs. **See Appendix A for a full list of schools and programs offered.**

Some EU projects (PHARE VET, EU VET 1-3) have curriculum modules for 79 occupations, including occupations in the tourism and hospitality sectors. Based on the developed modules and previously developed modular curricula in Republika Srpska, modular curricula for all occupational groups have been developed. Module systems are applied in all secondary vocational schools in Republika Srpska. However, in addition to modular, secondary vocational education schools in the Federation of Bosnia and Herzegovina also use the traditional curricula system.

The programs offered in secondary technical and vocational schools in Bosnia and Herzegovina includes the following occupations:

- waiter
- cook
- confectionary
- tourism technician
- hospitality technician
- culinary technician
- hotel tourism technician
- agri tourism technician

4.2 UNIVERSITY AND COLLEGE EDUCATION

Tourism and hospitality programs are offered at 13 public and private universities and colleges. Tourism programs are offered at Science, Geography, Economics Faculties and Colleges. Hospitality and catering programs are offered in a limited number of universities or colleges.

Table 4.3 details the universities offering programs in tourism and hospitality in Bosnia and Herzegovina. Tourism programs are offered at 8 universities/colleges in the Federation of Bosnia and Herzegovina (5 public and 3 private), and 5 universities/colleges in the Republika Srpska (2 public and 3 private).

Table 4.3: Universities and Colleges Offering Programs for the Tourism Sector

	Name	Place	Entity	Department/study program name	Type
1	Faculty of Natural Sciences and Mathematics, University of Sarajevo	Sarajevo	FBIH	Geography - Tourism and Environmental Protection	Public
2	College of Tourism & Management, Konjic	Konjic	FBIH	Management in Tourism and Hospitality	Private
3	Faculty of Natural Sciences and Mathematics, University of Tuzla	Tuzla	FBIH	Geography / Tourism	Public
4	Faculty of Management and Business Economics, University of Travnik	Kiseljak	FBIH	Management in Tourism and Hospitality	Private
5	"Džemal Bijedić" University, Mostar	Mostar	FBIH	Tourism studies	Public
6	Faculty of Natural Sciences, Mathematics, and Education, University of Mostar	Mostar	FBIH	Tourism and environmental protection	Public
7	University Herzegovina	Mostar	FBIH	Tourism & Ecology; Tourism & Recreation, Destination Marketing Mgmt	Private
8	Faculty of Economics, University of Bihać	Bihać	FBIH	Business Economics, Management, Marketing in Tourism	Public
9	Faculty of Economics, University of East Sarajevo	East Sarajevo	RS	Tourism and hospitality	Public
10	College of Tourism and Hotel Management	Trebinje	RS	Tourism and Hotel Management / Business Economics of Tourism	Private
11	Sinergija University, Bijeljina	Bijeljina	RS	Tourism and Hotel Management,	Private
12	Faculty of Tourism and Hospitality, University Business Studies Banja Luka	Banja Luka	RS	Tourism, Hospitality, Restaurant Management, Gastronomy	Private
13	Faculty of Economics, University of Banja Luka	Banja Luka	RS	Tourism Management, Cultural Tourism Management	Public

The following describes programs offered at the 13 universities/colleges:

1. **Tourism and Environmental Protection, Department of Geography, Faculty of Science, University of Sarajevo** offers three study cycles. Students acquire a Bachelor of Tourism and Environmental Protection from cycle I; a Master of Geography – major in Tourism and Environmental Protection from cycle II, and a Doctor of Geographical Sciences in Tourism & Environmental Protection (cycle III).
2. **College of Tourism and Management in Konjic** – is developing specific study programs in cycle I, such as Geotourism and Management in Tourism (with the title of Bachelor of Management in Tourism), and Communication and Tourism (with the title of Bachelor of Communication in Tourism). The College of Tourism and Management in Konjic is implementing a four-year study program in Geotourism that covers geography (geomorphology, climatology, etc.) and tourist geography with subjects such as economics and management tourism and hospitality, communication, and English and German. In the first 7 semesters, there are 42 subjects, while the 8th semester has 5 of them. Communication and tourism is a study program with the least enrolled and graduated students at this higher education institution. It lasts 4 years and includes courses related to communication, media, public relations, tourism, marketing, and management in tourism and foreign languages as part of elective courses. Students majoring in tourism management have the same courses in the 1st year as in the study of communication and tourism, but also a lot of the same courses in the coming semesters.
3. **Department of Geography, Faculty of Science, Tuzla** – offers a four-year program in Tourism (cycle I), with a Bachelor in Tourism.
4. **Faculty of Management and Business Economics of the University of Travnik** – is located in Kiseljak. It offers a three-year undergraduate study at this faculty, after which the Bachelor of Management in Tourism and Hospitality is awarded. The study of management in tourism and catering at the Faculty of Management and Business Economics, University of Travnik is a three-

year study program with the joint first two years, i.e., the same subjects in all 6 study fields existing at this faculty. Subjects are from the field of economics (macroeconomics, microeconomics, basics of marketing, business economics, accounting, public finance, etc.). In the 3rd year, in addition to economic subjects, tourism geography, ecology, and tourism, tourism, and sports, etc. are studied. During the studies, students must pass 36 exams, and the study program includes professional practice in the last year.

5. **Džemal Bijedić University, Mostar** – the study of tourism is organized in the first and second cycle of studies, through Tourism (cycle I) and Management in Cultural Tourism (cycle II), after which the student acquires a Bachelor's degree in Tourism Management, or a master's degree in Tourism Cultural Management. The study of tourism at the Džemal Bijedić University was founded by the Faculty of Economics, the Faculty of Humanities, the Faculty of Education and the Faculty of Agri Mediterranean Studies. The focus of this three-year study program is on subjects from the economic field, such as marketing, accounting, financial management, hotel management, project management, etc., but also a subject in the field of tourist geography, specific forms of tourism, cultural history and foreign languages (English and German). Professional practice is part of the teaching process in the 3rd year of the study program.
6. **Tourism and Environmental Protection, Faculty of Sciences, Mathematics and Education, Mostar** – combines courses in geography, ecology, and management. After completing the first cycle of this study, the student acquires the title of Bachelor of Tourism and Environmental Protection, and after the second cycle, the Master of Tourism and Environmental Protection.
7. **Herzegovina University** – offers tourism programs in all three study cycles. In the first cycle of studies, students are offered three programs: Tourism and Ecology, Tourism and Recreation and Marketing Management of a Tourist Destination. The same fields of study are offered at the second cycle of education. Herzegovina University also offers doctoral study program in tourism.
8. **Faculty of Economics, University of Bihać** - the study of tourism is available as a specialization in cycle I – for a Bachelor in Business, Economics, Management, and Marketing in Tourism. The study of management and marketing in tourism was organized as part of the professional study program of Business Economics at the Faculty of Economics, University of Bihać.

The study program lasts for 3 years, and the teaching for the first two years is joint with the Financial Accounting study track. In the first two years, a total of 20 subjects are subjects in the field of economics, with the study of research methodology and foreign language. In the 3rd year, students have professional practice and subjects such as the basics of tourism, digital marketing, consumer behavior in tourism, etc.
9. **Faculty of Economics, University of East Sarajevo** – offers cycle I and cycle II programs, for a Bachelor in Tourism & Hospitality Economics (cycle I) and Master in Tourism & Hospitality Economics (cycle II).
10. **College of Tourism and Hospitality Management, Trebinje** - is a public college that offers three-year and four-year study programs, the title of Bachelor in Economics of Tourism is awarded.
11. **Faculty of Business Economics – Tourism & Hospitality, Sinergija, Bijelina** - The study program of Tourism and Hospitality at the University of Sinergija is a joint study in cooperation with the Faculty of Tourism and Hospitality Management, University of Belgrade, after which the student acquires the title of Bachelor in Tourism and Hospitality Economics. The study of tourism and hospitality at the Sinergija University is a four-year study program with half the subjects as other programs. The curriculum is based on subjects in economics, and students are offered restaurant management, gastronomy, food technology, etc., through elective courses. In addition to English, students can elect to study Italian or German as a second foreign language.
12. **Faculty of Tourism and Hospitality Management, University Business Studies Banja Luka** - is the only program that, in addition to the study program of Tourism, offers separate study programs in Hospitality, Restaurant Management, and Gastronomy. On completing the cycle I the

title of graduate manager of tourism, i.e., hospitality, gastronomy, or restaurant business, is acquired. The cycle II of studies lasts one academic year, after which the titles of Master of Tourism, Hotel Management, Restaurant Management, or Gastronomy is awarded (depending on the field of study). The Faculty of Tourism and Hospitality Management is the only faculty offering a three-year and four-year study program with the following specializations: tourism, hotel management, restaurant management, and gastronomy. The three-year study program of tourism consists of a total of 38 subjects in the field of economics, law, tourist geography, ecology, etc. The four-year study program has a total of 51 subjects with a final thesis, but unlike the three-year study program, there is professional practice included. The first year of study is the same for all fields of the mentioned three-year and four-year study programs, with the proviso that Restaurant management and Gastronomy have additional professional practice. Also, in addition to English, all groups have Russian and German languages.

13. **Faculty of Economics, University of Banja Luka** – offers cycle II programs for a Master in Management of Cultural Heritage and Cultural Tourism and Master in Tourism Management.

There are two further institutions in the planning phase but not delivering programs, these are:

- School of Economics and Business, University of Sarajevo.
- Banja Luka College – offering Management in Gastronomy and Hospitality.

4.3 ADULT LEARNING

The focus of educational policies in European countries has increasingly been on adult education. Adult learning tourism-oriented programs are provided by both Secondary Vocational Schools and Adult Learning Centers. Currently, 12 such centers in Bosnia and Herzegovina offer tourism-relevant education programs, as well as 23 Secondary Vocational Schools¹. Most Adult Learning Centers and Secondary Vocational Schools provide programs for cooks (19) and waiters (17). The most numerous are training programs for hospitality and culinary technicians (12) and tourism technicians (6). Only center that provides programs for housekeeping, food and beverage management as well as receptionist is 'Žiža', while 'Nahla' is the only one that provides programs for intercultural training. Three centers offer an educational program for confectioners. **Appendix B lists the Adult Learning Centers by location and programs offered.**



¹ - 18 vocational schools are listed in Appendix A since they are Secondary Vocational Schools, that also provide adult learning educational programs for the tourism sector. Appendix B lists additional 5 schools providing only adult education in tourism.

GAP ANALYSIS: SUPPLY AND DEMAND

5. GAP ANALYSIS: SUPPLY AND DEMAND

As more tourists visit Bosnia and Herzegovina, the tourism industry will continue to expand, and demand for employees across the subsectors will increase. 2019 was used as the baseline to identify the human capital complement before the Covid 19 pandemic shut down the tourism and hospitality industry. In 2019, the tourism industry employed 30,422 people across the six major tourism sectors. Recovery to the 2019 baseline number of employees is projected to be in two phases, detailed in Table 5.1.

Phase 1: Recovery Phase – 2021 - 2023, and **Phase 2:** Growth Phase - 2024 – 2027.

Phase 1, by the end of 2023, it is forecasted that the tourism and hospitality sectors will return to the 2019 level of employment, that is 30,422 employees. The total demand gap has to include the fact that 20% of the baseline employees will not return to the tourism industry. It is forecasted that **6,100** (1,800 in 2021 + 4,300 in 2022 & 2023) will not return to tourism careers or jobs. Many will seek new careers or professions outside of tourism or may opt to take job opportunities in neighboring countries.

Phase 2, 2024 – 2027, the number of tourism employees is expected to increase by **12,400** (6,200 in 2024 - 25 + 6,200 in 2026 - 27) through to 2027, as hotels grow room occupancy and tourism sector businesses will expand and improve services and products.

The total demand for human capital in Phases 1 and 2 will be **18,500 positions**.

A total of **17,810** students and adults will join programs in tourism education and training programs. However, only half will pursue careers in the tourism industry. The total projected supply is **10,400** graduate employees. The projections of the human capital demand-supply gap span 2021 to 2027 is estimated at **8,100** additional employees needed to meet recovery and growth demand over the next 7 years.

The key gaps in the demand supply are two:

- 1) The recovery period, in which the tourism sectors employes the employees it furlowed in early 2020. This is projected to take place in two phases. A major challenge is that at least 20% will not return to jobs in the industry this is projected to create a shortfall gap of 6,100.
- 2) The second gap is created by the increased demand for new first entry employees, projected to be 12,400 employees. This gap will need to be bridged through new recruits from secondary schools and universities. In addition industry sectors will need to provide industry based (on the job) training programs to train potential return to work people (such as elderly and women).

Projections of recovery and increased demand are conservative and are based on UNWTO Barometer for 2019 and the for WTTC report.²

Research Based on Multiple Sources

Multiple sources of data were used to compile data presented in the report. Official statistics were accessed from the Agency for Statistics of Bosnia and Herzegovina, Institute for Statistics of Federation of Bosnia and Herzegovina, Institute for Statistics of Republika Srpska, and Department for Statistics of Brčko District.

Given the variable collection and reporting methodologies, data was processed and analyzed to extract estimations, which were then compared against tourism data such as the UNWTO Compendium for 2019 and WTTC Economic Impact Reports 2021 for BiH.

² UNWTO Compendium for 2019, and WTTC Economic Impact Reports May, 2021 for BiH. – see references.

Table 5.1: Demand, Supply and Human Capital Gap – 2021 – 2027

Sector	Projected Demand				
	Employees				
	Baseline 2019 Employees	2020-2021- (Low recovery)	2022 – 2023 (Med - High recovery)	2024 - 2025 Plus 20% increase on 2019 (approx.)	2026-2027 Plus 20% increase on 2019 (approx.)
Tourism Services	1,145	114 (10%)	1,031 (90%)	260	260
Tourism Transport	966	96 (10%)	870 (90%)	200	200
Tourism Accommodation	10,596	2,119 (20%)	8,477 (80%)	2,120	2,120
Food and Beverage Businesses	14,755	5,900 (40%)	8,855 (60%)	2,940	2,940
Tourism Attractions	720	144 (10%)	576 (90%)	140	140
Leisure Activities	2,240	448 (20%)	1,792 (80%)	540	540
Total Demand	30,422	8,821	21,601	6,200	6,200
Projected Demand Based on Filling Employee Gap (2021 – 2027) and Projected Growth					
Re-employed from pre Covid (80% re employed)		7,000	17,300	6,200	6,200
Shortfall (Human Capital loss to industry)		1,800	4,300		
Demand - Employees required 2021 - 2027		1,800	4,300	6,200	6,200
Total Demand – Employees					18,500
Projected Supply					
Total supply from Education & Training		2,600	2,600	2,600	2,600
Total Supply provided 2021-2027- (rounded)					10,400
Gap - Demand for Employees and Supply from Education & Training Providers					8,100

5.1 PROJECTED DEMAND FOR HUMAN CAPITAL – 2024 – 2027 (SEE CHAPTER 3)

In 2019 human capital turnover was a consistent trend across the industry. Turnover was primarily a result of employees leaving in search of better benefits and salaries. In addition to being attracted by offers from neighboring Croatia.

Levels of annual human capital turnover 2021 - 2027 are projected to reach 6,100 (1,800 + 4,300). Demand for new employees due to labor turnover/replacement/employees not returning to the industry following Covid 19 recovery is projected to be 20%, the highest in the tourism accommodation and food & beverage service subsectors. This is unsurprising due to the fact that turnover rates are highest across hotels and restaurants and that such establishments require a greater number of employees.

Projected demand for new employees does not only stem from labor turnover and replacement alone. Another area of projected demand in the coming years will undoubtedly come from improvement or expansion of current businesses. In addition to relatively high human capital turnover rates in the tourism industry, the projected demand for employees due to expansion of current business will reach 12,400. Table 5.2. below outlines demand across tourism industry subsectors due to improvement or expansion of current businesses in the years 2024 and 2027. As expected, the greatest demand for employees exists in the accommodation (30%) and restaurants (20%) subsectors. Lower demand for new employees is seen across the tourism transport, tourism services, and other subsectors at a 20% increase from total employees in 2027.

Croatia is in need for 5,000 workers for the summer season

Source: NI Croatia - June 27, 2021

These days, tourist companies are facing a huge problem because of the lack of workers, which is why it is even questionable to open some facilities, primarily hotels. Every major travel company is currently short of several hundred workers.

As there are no people on the domestic market, because a good part of the seasonal workers have fled to other sectors due to the pandemic of coronavirus, all hopes are placed on foreign labor, primarily workers from outside the EU., i.e. from Bosnia and Herzegovina. According to the Ministry of the Interior, there are currently almost 5,000 applications for work permits in the procedure, meaning that that many jobs are urgently waiting for workers.

<https://ba.n1info.com/regija/hrvatskoj-nedostaje-5-000-radnika-za-lijetnu-sezonu/>

Table 5.2.: Projected demand for employees due to expansion and Improvement

Main Sectors	By 2023 recovery to 2019 Level	2024 & 2027 Demand for New Employees	% increase	Rationale (Expansion and Improvement)
Tourism Services	1,145	520	20%	Increase of 20% is projected due to increased business and employee movement
Tourism Transport	966	400	20%	Increase of 20% is projected due to employees being attracted to other services
Tourism Accommodation	10,596	4,240	30%	Increase of 30% is projected due to increase in businesses, expansion & employees being attracted to other services or overseas
Food and Beverage Services	14,755	5,880	20%	Increase of 20% projected due to increase in businesses, & employees being attracted to other services, competitors or overseas
Tourism Attractions	720	280	20%	Increase in 20% due to improved services and added attractions
Tourism Leisure Activities	2,240	1,080	20%	An increase of 20% is projected due to introduction of new activities & higher demand
Totals	30,422	12,400		

Source: Aggregated from survey assessment results

5.2 SUPPLY OF GRADUATES AND TRAINED ADULTS TO ENTER THE HUMAN CAPITAL POOL (SEE CHAPTER 4)

Table 5.3 below outlines the projected supply of employees by educational institution type. 17,810 graduates are projected from 2021 to 2027. Of these graduates, only 50% will go on to work in the hospitality and tourism industry; this may be due to cultural factors, perception of the industry, lack of skills, and graduates being attracted to other industries or countries. This leaves total supply for the projection period 2021 – 2027 at 10,400 employees.

Table 5.3: Total Supply - Graduates & Adults to Enter the Tourism Industry 2021 - 2027

Total Annual Supply	Annual Graduates / Adults Trained			
	Secondary Schools	Universities & Colleges	Adult Learning Centers	Totals
No Students Enrolled (Cohorts in pipeline)	15,480	1,360	970	17,810
Number graduated or trained annually (2019)	2,960	500	970	3,880
Estimated % graduates entering employment	50%	50%	90%	
Graduates available to work in industry	1,480	250	873	2,603
Total Graduates + Adults to Enter Industry (2603 rounded to 2,600)				2,600
Total Supply 2021 – 2027				10,400

Source: Aggregated from survey assessment results

TOURISM TRAINING NEEDS ANALYSIS

6. TOURISM TRAINING NEEDS ANALYSIS

Overall, levels of formal training at the managerial level were high across the tourism industry. The sector with the lowest level was the restaurant and cafes sector, partly because of the high numbers of family-owned and owner-run restaurants. Levels of formal training received prior to being hired are relatively low in the tourism industry, with only 18% of the employees being formally educated. The highest numbers of formally trained employees are seen in tourism attraction and tourism services sectors, reporting that 50% of their employees are formally trained. Approximately 38% of the tourism industry's workforce is multi-skilled, meaning that they are trained and carry out more than one job within the same business subsector. The sectors with the highest level of multi-skill were the accommodation and tourism transport sectors, with approximately 60% of their employees being multi-skilled.

Regarding commitment to training (on-the-job training), only 16% of survey respondents had a formal training plan for their employees in place. Only 8% had allocated a budget for training. The hotel and restaurant sectors were the ones with the highest instances of training plans in place; 60% of hotels had a training plan and around 40% of them had a training budget. It is clear from these assessment findings that, despite the recognition across sectors that education and training are essential for productivity and professionalism, there has been relatively little effort to implement in-house training programs or to send employees to training courses. Establishments in the industry all expressed that their employees need further training in various skills

6.1 LEVELS OF MULTI SKILLING IN SECTORS / SUBSECTORS

Approximately 38% of the tourism industry's workforce is multi-skilled, meaning that they are trained and carry out more than one job within the same business subsector. The sectors with the highest level of multi-skill were the accommodation and tourism transport sectors, with approximately 60% of their employees being multi-skilled. Conversely, only 15% of the employees in apartment hotels are multi-skilled. Table 6.1 shows the percentages for every sector.

38% of the tourism industry's workforce is multi-skilled, meaning that they are trained to carry out more than one job within the same business subsector.

Table 6.1.: Levels of Multi Skilling in Sectors / Subsectors

Main Sectors	Subsectors	Level of Multi-skill (%)
Tourism services	Travel Agents and Tour Operators	45%
Tourism transport services	Taxi and Tourist Bus Operators	60%
Tourism Accommodation	Hotels	60%
	Apartment hotels, etc.	15%
Food and Beverage Services	Restaurants	30%
	Café and coffee shops	50%
Tourism attractions	Museums and Galleries	20%
Tourism Leisure Activity Providers	Water and Adventure Sports	20%
Total (average)		38%

Source: Aggregated from survey assessment results

6.2 TRAINING LEVELS OF TOURISM HUMAN CAPITAL

Levels of formal training received prior to being hired are relatively low in the tourism industry, with only 18% of the employees being formally educated. The sector with the highest number of formally trained employees is the tourism attraction and tourism services sectors, reporting that 50% of their employees are formally trained. The tour guiding sector had a low level of formal training at 10%, as shown in Table 6.2. below. The subsectors with the lowest percentage of formally trained employees were the apartment hotels, cafe and restaurants sectors. Tourism sectors mainly rely on non-formal (on-the-job training) at 58% of human capital. The assessment identified that 23% of employees did not have any form of training. Untrained human capital can impact the level of service and product standards, and ultimately the tourist experiences.

Table 6.2.: Training Levels of Tourism Industry Human Capital / Sector

Main Sectors	Subsectors	Level of Training		
		Formal (Off the Job training)	Non- or Informal (On the job Training)	Untrained (no form of training received)
Tourism Services	Travel Agents	30%	70%	0%
	Tour Guiding	10%	80%	10%
	Tour Operators	50%	50%	0%
Tourism Transport Services	Car Rental	0%	50%	50%
	Tourism Transport Companies	20%	60%	20%
Tourist Accommodation	Hotels	40%	50%	10%
	Apartment Hotels	0%	40%	60%
Food and Beverage Services	Tourism Restaurants	15%	50%	35%
	Coffee Shops	0%	50%	50%
	Pub Restaurants	0%	50%	50%
Tourism Attractions	Museums and Heritage Attractions	50%	50%	0%
Tourism Leisure Activities	Water Sports	0%	80%	20%
	Adventure Sports	20%	80%	0%
Total (average)		18%	58%	23%

Note: Percentages rounded

6.3 LEVELS OF HUMAN CAPITAL TRAINING PLANNING AND BUDGETING

Regarding commitment to training (on-the-job training), only 18% of survey respondents had a formal training plan for their employees in place. Only 8% had allocated a budget for training. The hotel and restaurant sectors were the ones with the highest instances of training plans in place; 60% of hotels had a training plan and around 40% of them had a training budget. Conversely, apartment hotels, tourism attractions and tourism car rental businesses seem to not have had any training plans at the time the surveys were completed. Table 6.3 provides more detailed information.

Table 6.3.: Levels of Human Capital Training Planning and Budgeting in Sectors 2019

Main Sectors	Subsectors	Businesses with Training Plan	Businesses with Training Budget
Tourism Services	Travel Agents	20%	10%
	Tour Operators	20%	10%
Tourism Transport	Car Rental	0%	0%
	Tourism Coach Co	10%	0%
Tourist Accommodation	Hotels	60%	40%
	Apartment Hotels	0%	0%
Food & Beverage Services	Tourism Restaurants	40%	20%
	Coffee Shops	10%	10%
Tourism Attractions	Museums & Heritage	0%	0%
Leisure Activities	Water Sports	20%	0%
	Adventure Sports	10%	0%
Total (average)		16%	8%

Note: Percentages rounded



6.4 HUMAN CAPITAL TRAINING NEEDS BY TOURISM SUBSECTORS

It is clear from these assessment findings that, despite the recognition across sectors that education and training are essential for productivity and professionalism, there has been relatively little effort to implement in-house training programs or to send employees to training courses. Establishments in the industry all expressed that their employees need further training in various skills, as shown in Table 6.4. below, but very few had training plans or a training budget in place to address these needs.

Table 6.4.: Identified Human Capital Training Needs by Tourism Subsectors

Training Needs Identified	Hotels	Aparthotels & other	Restaurants	Tourism Attractions	Tourism Services	Tourism Transport	Leisure Activities
Administration and Management							
Accounting methods and controls		•				•	
Sales and marketing skills	•	•	•	•	•	•	•
Quality control systems for tourism businesses	•	•	•	•	•	•	•
Supervisory management skills	•		•				
Daily work scheduling and rostering	•	•	•	•	•	•	•
Train-the-trainer programs	•	•	•	•	•	•	•
Food and Beverage							
Bar operation and management	•		•				
Service skills in food and beverage	•	•	•				
Cooking skills	•	•	•				•
Menu design and planning	•		•				
Food production for chefs and cooks	•	•	•				•
Wines and cocktails	•		•				
Organization of food & beverage buffet	•		•				
Preparation of special diet dishes	•		•				
Merchandising techniques	•		•		•		
Skills in pastry and bakery	•	•	•				
Communication and Guest Courtesy							
Communication techniques	•	•	•	•	•	•	•
English or European language skills	•	•	•	•	•	•	•
Etiquette and customer service	•	•	•	•	•	•	•
Tourism industry awareness	•	•	•	•	•	•	•
IT/internet use and skills	•		•		•	•	•
Tourist Safety							
Fire, safety and security	•	•	•				
First aid	•				•	•	•
Health and hygiene standards	•	•	•			•	
Housekeeping							
Housekeeping training for unskilled employees	•	•	•				
Other							
Tour guiding				•	•		•
Museums archiving				•			
Flora, fauna and wildlife guiding					•		•

Source: Aggregated from survey assessment results

The outstanding training needs, coupled with this future expansion of business and the plans for enhancing quality of service and product developments taking place across the country, imply a strong need for the development of training programs both for current employees and for future employees.

6.5 TRAINING STATUS OF EMPLOYEES

6.5.1 Training Status and Needs of Hotel Employees

Employees that have received formal training varies between departments. For example, about 40% of the front office employees and over 80% of managers have received formal training. Employees working in housekeeping and maintenance are with the lowest levels of formal training.

Of the surveyed hotels, 40% declared that some of their employees had attended formal, outside training courses. On the other hand, 50% reported that employees were trained on the job, indicating the need for train-the-trainer programs to be implemented in hotels. 60% of respondent hotels had a formal training plan document for 2019, but 40% of hotels had allocated budget for these plans. Despite the availability of courses and awareness of their existence, approximately 65% of business employees need basic or advanced skills training, especially in customer relations, customer care, sales techniques, and professional skills. Hotels surveyed indicated that employees require the following training:

Administration and Management	
Sales and marketing skills	Daily work scheduling and rostering
Quality control systems for tourism businesses	Train-the-trainer programs
Supervisory management skills	
Food and Beverage	
Bar operation and management	Wines and cocktails
Service skills in food and beverage	Organization of food & beverage buffet
Menu design and planning	Merchandising techniques
Food production for chefs and cooks	Skills in pastry and bakery
Communication and Guest Courtesy	
Communication techniques	Tourism industry awareness
English or European language skills	IT/internet use and skills
Etiquette and customer service	
Housekeeping	
Housekeeping training for unskilled employees	
Tourist Safety	
Fire, safety and security	
First aid	
Health and hygiene standards	

None of the apartment hotels and other accommodation types declared that they had a training plan or training budget in place for 2019. None of them provided formal training opportunities for their employees. Training needs to be implemented in-house by owners and managers, and there was no evidence of multi-skill employment taking place. Table 6.5 below shows the exact percentages of trained and untrained employees in this sector.

Table 6.4: Training Status of Hotel Employees by Department

Department	Type of Training		
	Formal	Non - Formal	Untrained
General Manager	15%	25%	60%
Assistant Managers	0	0	0
Heads of Department/ Supervisors	0	0	0
Food and Beverage Service	5%	25%	70%
Kitchen	5%	20%	75%
Bar	5%	25%	70%
Conference /Banqueting	0%	20%	80%
Stewarding/Back House	5%	15%	80%
Front Office	10%	20%	70%
Housekeeping	0%	40%	60%
Administration/Accounts	10%	60%	30%
Marketing and Sales	10%	20%	60%
Human Resource Mgmt./ Personnel	5%	15%	80%
Average Level of Training (%)	5%	30%	65%

Source: Aggregated from survey assessment results

6.5.2 Training Status of Apartment Hotel Employees

In Apartment Hotels, the percentage of employees that have been formally trained in the hotel subsector is 0%, while that of informally trained employees is 40%. The percentage of completely untrained staff stands at 60%. This will reflect on the quality of service provided by these establishments. The fact that 40% of staff members had been trained on the job indicates a strong need to implement a “train-the-trainer” program. When asked what specific skills their employees needed to be trained in, the surveyed businesses listed the following:

Administration and Management	
Accounting methods and controls	Daily work scheduling and rostering
Sales and marketing skills	Train-the-trainer programs
Quality control systems for tourism businesses	
Food and Beverage	
Service skills in food and beverage	Food production for chefs and cooks
Cooking skills	Skills in pastry and bakery
Communication and Guest Courtesy	
Communication techniques	Etiquette and customer service
English or European language skills	Tourism industry awareness
Tourist Safety	
Fire, safety and security	Health and hygiene standards
Housekeeping	
Housekeeping training for unskilled employees	

6.5.3 Training Status of Food and Beverage Service Employees

Multi-skilled employees are common in the food and beverage sector. Approximately 30% of restaurant employees are multi-skilled and work mainly between the kitchen and service departments or between the kitchen and bar departments. Café and coffee shops have a 50% multi-skilling, again between service, service kitchen and or bar. The survey showed that only 5% of staff across the sector had been formally trained off the job.

Table 6.6 below provides further detail about the status of training in the main subsector.

Table 6.6: Training Status of Food and Beverage Service Employees/ Subsectors

Subsectors	Type of Training		
	Formal (off - job)	Non-Formal (On-job)	Untrained
Tourist Restaurants	15%	50%	35%
Pub Restaurants	0%	50%	50%
Coffee Shops & Cafes	0%	50%	50%
Average % of Training	5%	50%	45%

Source: Aggregated from survey assessment results

An estimated 15% of restaurant employees are designated trainers, meaning they could carry out training programs for new hires. When asked about the training needs of their employees, the food and beverage service sector surveyed listed the following:

Administration and Management	
Sales and marketing skills	Supervisory management skills
Quality control systems for tourism businesses	Train-the-trainer programs
Food and Beverage	
Bar operation and management	Wines and cocktails
Service skills in food and beverage	Organization of food & beverage buffet
Cooking skills	Preparation of special diet dishes
Menu design and planning	Merchandising techniques
Food production for chefs and cooks	Skills in pastry and bakery
Communication and Guest Courtesy	
Communication techniques	Tourism industry awareness
English or European language skills	IT/internet use and skills
Etiquette and customer service	
Tourist Safety	
Fire, safety and security	Health and hygiene standards

6.5.4 Training Status of Tourism Attraction Employees

The level of training of employees varies considerably between departments and subsectors. Approximately 50% of supervising officers have attended formal training courses. Whether privately or publicly managed, none of the attractions had either a training plan or a training budget in place for 2019. When asked what skills their employees needed to be trained in, they provided the following list:

Administration and Management	
Sales and marketing skills	Daily work scheduling and rostering
Quality control systems	Train-the-trainer programs
Communication and Guest Courtesy	
Communication techniques	Etiquette and customer service
English or European language skills	Tourism industry awareness
Other	
Tour guiding techniques	Museums archiving

6.5.5 Training Status of Tourism Services Employees

Approximately 45% of travel agencies and tour operator employees are multi-skilled and work between the management, reservation and travel consultancy departments. When asked what training needs they had, surveyed businesses listed the following:

Administration and Management	
Sales and marketing skills	Train-the-trainer programs
Quality control systems	Merchandising techniques
Communication and Guest Courtesy	
Communication techniques	Tourism industry awareness
English or European language skills	IT/internet use and skills
Etiquette and customer service	
Tourist Safety	
First aid	Flora, fauna and wildlife guiding
Tour guiding techniques	

6.5.6 Training Status of Tourism Transportation Service Employees

Generally, all the sector's managers have received some form of formal training. This is not the case among owner-managers, who have a considerably lower level of training. On the job training occurs on a regular basis across the sector. When asked what training needs they had, surveyed companies listed the following:

Administration and Management	
Accounting methods and controls	Quality control systems for tourism businesses
Sales and marketing skills	Train-the-trainer programs
Communication and Guest Courtesy	
Communication techniques	Etiquette and customer service
English or European language skills	IT/internet use and skills
Tourist Safety	
First aid	Health and hygiene standards

6.5.7 Training Status of Tourism Leisure Activities Employees

Most of the tourism leisure activities are small business or sole trader businesses. Hence, none of the Water sport or adventure activity providers declared that they had a training plan or training budget in place for 2019. None of them provided formal training opportunities for their employees. Training needs to be implemented in-house by owners and managers, and there was an estimated 20% of multi-skill employment taking place. The following training needs are identified as follows:

Administration and Management	
Sales and marketing skills	Daily work scheduling and rostering
Quality control systems for businesses	Train-the-trainer programs
Food and Beverage	
Cooking skills	Food production for chefs and cooks
Communication and Guest Courtesy	
Communication techniques	Tourism industry awareness
English or European language skills	IT/internet use and skills
Etiquette and customer service	
Tourist Safety	
First aid	
Other	
Tour guiding	Nature, flora and fauna guiding

KEY RECOMMENDATIONS FOR HUMAN CAPITAL DEVELOPMENT

7. KEY RECOMMENDATIONS FOR HUMAN CAPITAL DEVELOPMENT

The friendliness and hospitality of the people differentiate Bosnia and Herzegovina from regional competitor destinations. Tourists perceive this as a significant distinguishing advantage. Customer and guest care and hospitality development is an issue that needs careful management by the tourism industry. Employees working in the industry must understand the importance of guest and customer satisfaction. In addition, the primary objective of human capital training and education in tourism must be to improve the quality of the tourism product and services offered to customers to build productivity and capability in business and enhance career prospects for talented and ambitious students and employees.

Despite the widespread acknowledgment of the importance of education and training for the continued development of the tourism industry, there has been relatively little direct involvement or investment by the industry in this area. A culture of continuous and structured training of staff is necessary within the industry. Similarly, continuing training for managers and owner-managers of tourism businesses, particularly in small family businesses, does not presently exist on a scale that would permit an upward development shift in the sector.

7.1 STRATEGIC RESPONSES REQUIRED FROM THE ASSESSMENT

The considerable success that the tourism industry has achieved over the past ten years reflects the initiative, drive, energy, and skills of many excellent people within the industry. The following strategic responses are required from the relevant tourism authorities, policy planners, education providers and industry leaders. A blueprint for strategic development of tourism human capital is provided through a separate Turizam document: Bosnia and Herzegovina Human Capital Development Strategy and Plan 2021-2027 wherein the following recommendations have been further elaborated in terms of roles and responsibilities, implementation actions and measures and illustrative timeframes.

7.1.1. RECOMMENDATIONS REQUIRING ACTION FROM RELEVANT TOURISM AUTHORITIES AND POLICY PLANNERS

Relevant tourism authorities comprises of ministries and government departments responsible for tourism at the level of entities (FBiH and RS), Brčko District as well as cantons (in FBiH). A strategic plan should be put in place to respond to the following requirements derived from the assessment:

- 1) **Provide a forum for human capital development policy:**
Tourism relevant authorities and leaders to establish a forum to lead and influence the human capital development policy for the tourism industry. Designed to capture the industry's feedback to lobby relevant authorities, government, and private sectors to enhance human capital supply and capacity at all levels.
- 2) **Establish and support Tourism Human Capital Development Councils:**
Establish and support Tourism Human Capital Development Councils to coordinate the education and training of human capital in the tourism industry. It is recognized that two councils will need to be established for the Federation of Bosnia and Herzegovina and the Republika Srpska.
- 3) **Establish a center to coordinate regular human capital assessments:**
Prepare regular human capital and training needs assessments to inform planning and policy formulation. The center can be located in the Federation of Bosnia and Herzegovina and

Republika Srpska, and will be a coordinating body responsible for conducting research to inform human capital planning, development and education.

7.1.2. RECOMMENDATIONS REQUIRING ACTION FROM TOURISM EDUCATION LEADERS AND MANAGERS

A strategic plan should be put in place to respond to the following requirements derived from the assessment, leading to increased competitiveness of the education programs and outputs:

- 1) Increase enrollment on schools and universities programs:**
Design and launch coordinated awareness campaigns to attract students to study on tourism programs. Campaigns to include promotion at education fairs, visit high schools, print prospectuses for students, and conduct online promotion through social media.
- 2) Design Curriculum based on a Tourism Qualification Framework:**
Education management and industry representatives to partner in the development of occupational standards for professions career paths in the tourism sectors, to support and inform the update of teaching curriculum and pedagogy, and provides clear, flexible, and relevant industry-based training and certification programs leading to tourism qualifications which hold Entity recognition for excellence.
- 3) Strengthen and update curricula to match industry needs:**
Review and update program curricula and course syllabi. Examine existing curricula considering international best practices in the area and recommend initiatives to strengthen current approaches. Introduce introductory courses in tourism economics, management, and marketing in tourism studies. Introduce courses to strengthen and improve student communication and guest hospitality skills. Also plan, design and launch modules in bar tending, cocktail mixology, barista techniques, grill BBQ cookery, tourism sales and marketing and accommodation operations management.
- 4) Improve teaching methods:**
Facilitate access to teaching methodology programs. Include education pedagogy, delivery approaches, lesson planning and audio-visual material to support the learning process.
- 5) Update teachers and trainers knowledge of the tourism industry:**
Teachers and trainers facilitated to gain more experience within the tourism industry. Introduce teacher exchange programs with European institutes, teachers and professors at colleges and universities to be partnered with vocational schools to participate in a continuing industry training program to expand and refresh their skills and knowledge.
- 6) Improve training and teaching resources need to be improved:**
Improve standard and quality of equipment used for teaching purposes Provide IT and computer skills training amongst management and staff at universities and colleges. Upgrade the secondary school training laboratories to mirror operations in industry. Design and launch a funding program to support upgrades.
- 7) Strengthen international partnerships:**
Expand the international network of educational institutions by creating partnerships and opportunities for students. Strengthen partnerships through the UNWTO TedQual international program certification scheme.
- 8) Strengthen intern opportunities for graduates:**
Establish strong links between tourist businesses and educational institutions both in terms of internship positions and recruitment after graduation. Schools, universities, or colleges to make agreements hotels or restaurants whereby students could intern there during studies and then be hired after graduation based on their performance.

9) Facilitate practical placement experience in program curriculum:

Schools, universities and colleges to expand practical experience opportunities and so provide students with the necessary practical skills either by providing more specialized training facilities or by improving and lengthening their placement programs.

10) Plan a College for Culinary Arts for upskilling food and beverage professionals:

College for Culinary Arts be developed as a flagship center for either the Federation of Bosnia and Herzegovina and or Republika Srpska. to facilitate the development of BiH as a culinary tourism destination through professional upskilling of chefs and cooks in the tourism industry.

7.1.3. RECOMMENDATIONS REQUIRING ACTION FROM TOURISM INDUSTRY LEADERS AND MANAGERS

A strategic plan should be put in place to respond to the following requirements derived from the assessment:

1) Prepare tourism occupation and sector skills standards for tourism professions:

Document critical industry competencies, skills, and job profiles for pre-entry and existing employees under these profiles; evaluate the capabilities of vocational training in the tourism subsector; and its relevance to the needs of industry sectors.

2) Position the industry as a highly attractive career choice:

Position the industry as a highly attractive career choice through induction and pre-career training, the provision and support of recognized qualifications, clear career progression paths and opportunities within and across the different functional areas, and the promotion of quality work practices.

3) Design and rollout a tourism industry-based training and certification program:

Design and launch the Pathways to Professionalism Program as an initiative that will empower industry employers to raise awareness regarding career opportunities, train to professional standards, and certify those completing the professional levels of the scheme. Management of businesses to facilitate and support the delivery of training programs for existing employees at times and places convenient to the needs of business and employees and develop and train assistant managers and supervisors to respond to modern industry trends.

4) Strengthen practical experience in programs and intern opportunities for graduates:

Educational institutions and industry businesses to offer practical experience opportunities. Additionally, to establish strong links between tourist businesses and educational institutions both in terms of internship positions and recruitment after graduation. Post-graduation internship modules to be included in all programs to provide students an opportunity for their first job in their tourism career.

5) Provide training for SME Development in Tourism:

Dedicated programs for owners and managers of small and medium-sized enterprises to be developed with a heavy emphasis on implementing best practices in SME management and operation.

6) Address the shortfall and acquisition of qualified managers:

To address the pressing challenge in the tourism industry to address the shortfall of qualified managers, design and promote industry-based management development programs, such as Pathways to Professionalism Level 4 for management staff.

7.2. CONCLUSIONS TO INFORM RECOMMENDATIONS FOR THE STRATEGY

This assessment report makes a series of informed recommendations for the future development of the tourism industry. The following key recommendations impact the various sectors of the tourism industry as well as the educational institutions and relevant tourism authorities and policy planners. To further strengthen the human resource base, standards of performance, and professionalism of tourism in BiH, the industry must focus on addressing the following in Table 7.1.

Table 7.1. Assessment Conclusions Informing Recommendations for Human Capital Strategy

Actions by:	Key Recommendations
Relevant Tourism Authorities and Policy Planners	<ol style="list-style-type: none"> 1) Provide a forum for human capital development policy 2) Establish and support Tourism Human Capital Development Councils 3) Prepare tourism human capital development implementation plan 4) Establish a center to coordinate regular human capital assessments
Tourism Education Leaders and Managers	<ol style="list-style-type: none"> 1) Increase enrollment on schools and universities programs 2) Design Curriculum based on Tourism Qualification Framework 3) Strengthen and update curricula to match industry needs 4) Improve teaching methods need to be improved 5) Update teachers and trainers knowledge of the tourism industry 6) Improve training and teaching resources need to be improved 7) Strengthen international partnerships 8) Strengthen intern opportunities for graduates 9) Facilitate practical placement experience in program curriculum 10) Plan a College for Culinary Arts for upskilling professional chefs
Tourism Industry Leaders and Managers	<ol style="list-style-type: none"> 1) Prepare tourism occupation and sector skills standards for tourism professions 2) Position the industry as a highly attractive career choice 3) Design and rollout a tourism industry-based training and certification program 4) Strengthen practical experience in programs and internship for graduates 5) Provide training for SME development in tourism 6) Address the shortfall and acquisition of qualified managers

APPENDIX A: SECONDARY TECHNICAL & VOCATIONAL SCHOOLS WITH PROGRAMS IN TOURISM

Secondary Vocational Schools with Educational Programs for the Tourism Sector

	Name of School	Location	Entity/ district	Programs offered (No of years)
1	School for Hospitality, Trade and Tourism Banja Luka (+ALC)	Banja Luka	RS	Tourism technician (4) Hospitality technician (4) Culinary technician (4) Waiter (3) Cook (3)
2	Secondary school dr. Fra Slavko Barbarić Čitluk	Čitluk	FBiH	Hotel tourism technician (4) Cook (3) Waiter (3)
3	Hospitality and Trade School Doboj (+ALC)	Doboj	RS	Tourism technician (4) Hospitality technician (4) Culinary technician (4) Waiter (3) Cook (3) Confectioner (3)
4	Mixed secondary school Gračanica(+ALC)	Gračanica	FBiH	Tourism technician (4), Cook (3) Waiter (3)
5	Secondary school "28th June" East Sarajevo (+ALC)	East Sarajevo	RS	Tourism technician (4) Hospitality technician (4) Culinary technician (4)
6	Secondary school center Pale (+ALC)	East Sarajevo	RS	Tourism technician (4) Culinary technician (4) Cook (3)
7	Secondary school Jablanica (+ALC)	Jablanica	FBiH	Hotel tourism technician (4), Cook (3) Waiter (3)
8	Secondary school Jovan Dučić Kneževo	Kneževo	RS	Tourism technician (4)
9	Secondary school Kupres	Kupres	FBiH	Tourism technician (4) Hospitality technician (4) Hotel tourism technician (4) Waiter (3) Cook (3)
10	Secondary vocational school Silvija Strahimira Kranjčevića – Livno (+ALC)	Livno	FBiH	Hotel tourism technician (4) Waiter (3) Cook (3) Assistant cook (3)
11	Mixed secondary school for economics and chemistry Lukavac	Lukavac	FBiH	Waiter (3) Cook (3)
12	Secondary school for Economics, Tourism and Hospitality Mostar (+ALC)	Mostar	FBiH	Hotel tourism technician (4), Cook (3) Waiter (3)
13	Hospitality and Economics School in Prijedor" (+ALC)	Prijedor	RS	Tourism technician (4) Hospitality technician (4) Culinary technician (4) Waiter (3) Cook (3)
14	Secondary school "ĐURO RADMANOVIĆ" – NOVI GRAD	Novi Grad	RS	Agrotourism technician (4) Waiter (3) Cook (3)
15	Secondary school center Hadžići (+ALC)	Sarajevo	FBiH	Tourism technician (4) Cook (3)
16	Secondary school for hospitality and tourism Sarajevo(+ALC)	Sarajevo	FBiH	Tourism technician (4) Hospitality technician (4) Waiter (3) Cook (3) Confectioner (3)
17	School center "Petar Kočić" Srbac	Srbac	RS	Hospitality technician (4) Waiter (3) Cook (3)

	Name of School	Location	Entity	Programs offered
18	Secondary School Center Trebinje (+ALC)	Trebinje	RS	Tourism technician (4) Waiter (3) Confectioner (3) Cook (3)
19	Second secondary school Velika Kladuša (+ALC)	Velika Kladuša	FBiH	Cook (3)
20	Mixed hospitality school Zenica	Zenica	FBiH	Hospitality technician (4) Cook (3) Confectioner (3)
21	Secondary school center "Petar Kočić" Zvornik (+ALC)	Zvornik	RS	Tourism technician (4), Cook (3) Waiter (3)
22	Mixed secondary school Bihać	Bihać	FBiH	Tourism technician (4) Waiter (3) Cook (3)
23	Secondary school Čapljina	Čapljina	FBiH	Cook (3) Waiter (3)
24	Secondary vocational school	Tomislavgrad	FBiH	Agrotourism technician (4) Cook (3)
25	Secondary vocational school Posušje	Posušje	FBiH	Waiter (3) Cook (3)
26	Secondary school Antuna Branka Šimića Grude	Grude	FBiH	Waiter (3) Cook (3)
27	Secondary school Stolac	Stolac	FBiH	Waiter (3) Cook (3)
28	Secondary vocational school Jajce	Jajce	FBiH	Hotel tourism technician (4) Cook (3)
29	Secondary school Busovača	Busovača	FBiH	Hospitality technician (4) Culinary technician (4) Hotel tourism technician (4) Waiter (3) Cook (3)
30	Mixed secondary school for economics and hospitality Travnik	Travnik	FBiH	Hotel tourism technician (4) Waiter (3) Cook (3)
31	Secondary school Travnik - Nova Bila	Nova Bila	FBiH	Waiter (3) Cook (3)
32	Secondary school Vitez	Vitez	FBiH	Waiter (3) Cook (3)
33	Secondary school of economics Zenica	Zenica	FBiH	Hospitality technician (4)
34	Mixed secondary school Tešanj (+ALC)	Tešanj	FBiH	Cook (3)
35	Tourism and Hospitality School Tuzla	Tuzla	FBiH	Tourism technician (4) Hospitality technician (4) Waiter (3) Confectioner (3) Cook (3)
36	Mixed secondary school Srebrenik	Srebrenik	FBiH	Waiter (3) Cook (3)
37	Second secondary school Cazin	Cazin	FBiH	Hospitality technician (4) Tourism technician (4) Cook (3)
38	Secondary technical and vocational school Gradiška (+ALC)	Gradiška	RS	Waiter (3) Cook (3)
39	Secondary school center Nikola Tesla Kozarska Dubica	Kozarska Dubica	RS	Tourism technician (4)
40	Secondary school center Nikola Tesla Kotor Varoš	Kotor Varoš	RS	Tourism technician (4), Cook (3) Waiter (3)
41	Secondary school "Nikola Tesla" Brod	Brod	RS	Culinary technician (4), Cook (3) Waiter (3)
42	Secondary vocational and technical school Derventa	Derventa	RS	Hospitality-culinary technician (4) Waiter (3) Cook (3)

	Name of School	Location	Entity	Programs offered
43	Secondary school center "Jovan Dučić" Teslić (+ALC)	Teslić	RS	Hospitality technician (4) Culinary technician (4) Cook (3) Confectioner (3)
44	Secondary school "Ivo Andrić" Višegrad	Višegrad	RS	Tourism technician (4) Culinary technician (4)
45	Secondary school of economics Brčko	Brčko	BD	Tourism technician (4) Waiter (3) Cook (3)
46	Secondary Tourism-Hospitality school	Mostar	FBiH	Hotel tourism technician (4) Cook (3) Waiter (3)
47	Secondary school Čelinac (+ALC)	Čelinac	RS	Confectioner (3)
48	Secondary vocational and technical school Janja	Janja	RS	Tourism technician (4) Hospitality technician (4) Culinary technician (4) Waiter (3) Cook (3)
49	Mixed secondary school Sanski Most	Sanski Most	FBiH	Hotel tourism technician (4), Cook (3) Waiter (3)
50	Mixed secondary school Bosanski Petrovac	Bosanski Petrovac	FBiH	Hotel tourism technician (4), Cook (3) Waiter (3) Confectioner (3)
51	Special primary and secondary school Đorđe Natošević Prijedor	Prijedor	RS	Cook (3)
52	Center for hearing and speech rehabilitation	Sarajevo	FBiH	Cook (3)
53	Center "Protect Me" (CwD)	Banja Luka	RS	Cook (3)
54	Secondary school for vocational education and professional upskilling	Sarajevo	FBiH	Cook (3)

Note: (+ALC) = also offers adult learning tourism-relevant education programs through Adult Learning Centers (18 schools)

APPENDIX B: ADULT LEARNING CENTERS / LOCATION & PROGRAMS

Adult Learning Centers / Location and Learning Programs offered:

	Type	Name	Location	Entity	Learning program
1	Alc	Adult Learning Center Gračanica	Gračanica	FBiH	Waiter, cook, confectioner, hospitality technician
2	Alc	Žiža Learning Hotel	Mostar	FBiH	Housekeeping, food and beverage management, receptionist
3	Alc	Center for education and research Nahla	Sarajevo	FBiH	Intercultural training, basic language skills in hospitality, catering
4	Alc	Adult Learning Center "New Professions" Sarajevo	Sarajevo	FBiH	Waiter, cook, tourism and hospitality technician
5	Alc	Adult Learning Center Tuzla	Tuzla	FBiH	Waiter, cook, tourism technician, hospitality technician
6	Alc	EDUKA BH Adult Learning Center	Tešanj	FBiH	Waiter
7	Alc	Adult Learning Center Bijeljina	Bijeljina	RS	Waiter, cook, hospitality and culinary technician
8	Alc	Adult Learning Center Zvornik	East Sarajevo	RS	Waiter, cook, confectioner
9	Alc	Center for Education and Training	Zvornik	RS	Cook, hospitality and culinary technician
10	Alc	Business and Technical School - Bijeljina - Bijeljina	Bijeljina	RS	Waiter, cook, confectioner, hospitality and culinary technician
11	Alc	School for Adult Education "PRIMUS-EDU" Gradiška	Gradiška	RS	Waiter, cook,
12	Alc	ALC Education Center Bijeljina	Bijeljina	RS	Waiter, cook, tourism technician
13	Vs	Private school "Education center" Mostar	Mostar	FBiH	Waiter, cook, tourism and hospitality technician
14	Vs	Private secondary vocational school "Veritas" Široki Brijeg	Široki Brijeg	FBiH	Waiter, cook, tourism and hospitality technician
15	Vs	Private secondary vocational school Libar	Široki Brijeg	FBiH	Waiter, cook, tourism and hospitality technician
16	Vs	Private secondary vocational school Verbum-Mostar	Mostar	FBiH	Waiter, cook, confectioner, hospitality and culinary technician

Alc = Adult Learning Center, VS = Secondary Vocational School

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