Social Dialogue
07-10-2008
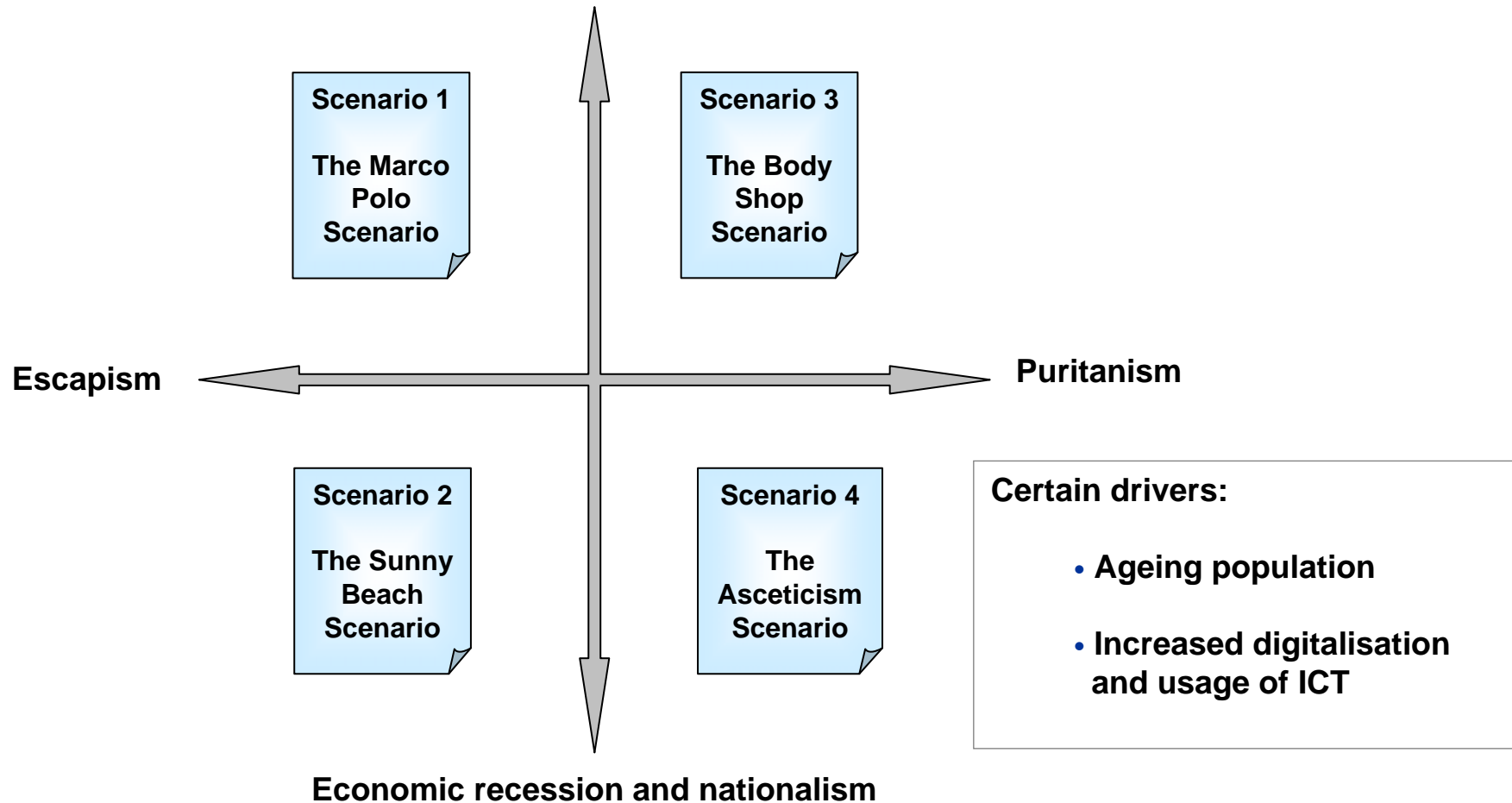
Lot 12 Hotels, restaurants & catering

Scenarios and implications
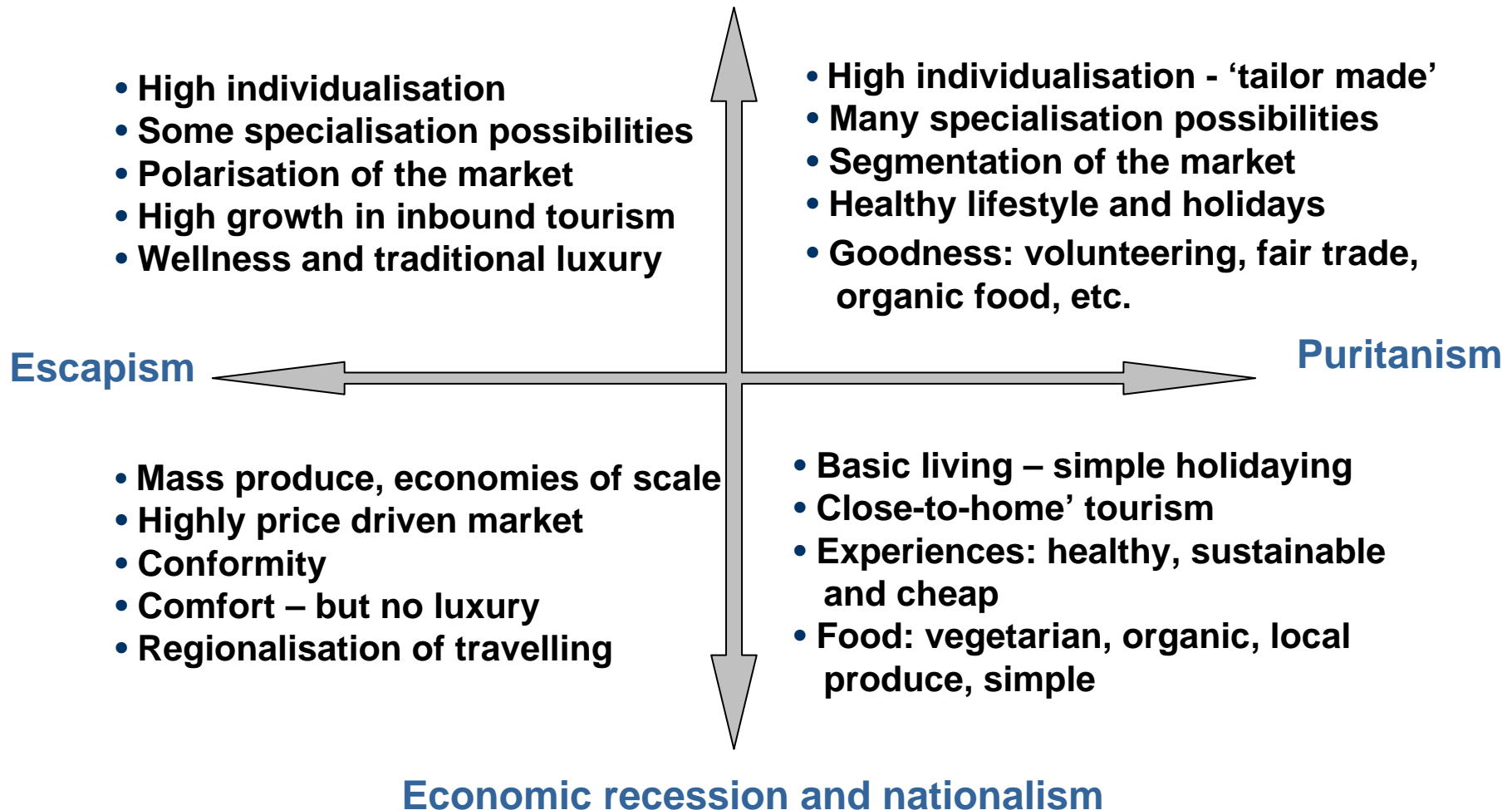
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Scenarios

Continued economic growth and globalisation

Scenario 1

The Marco Polo Scenario

Scenario 3

The Body Shop Scenario

Escapism ⟵————————————⟶ **Puritanism**

Scenario 2

The Sunny Beach Scenario

Scenario 4

The Asceticism Scenario

Certain drivers:

- **Ageing population**

- **Increased digitalisation and usage of ICT**

Economic recession and nationalism

Scenarios

Continued economic growth and globalisation

- **High individualisation**
- **Some specialisation possibilities**
- **Polarisation of the market**
- **High growth in inbound tourism**
- **Wellness and traditional luxury**

- **High individualisation - 'tailor made'**
- **Many specialisation possibilities**
- **Segmentation of the market**
- **Healthy lifestyle and holidays**
- **Goodness: volunteering, fair trade, organic food, etc.**

Escapism

Puritanism

- **Mass produce, economies of scale**
- **Highly price driven market**
- **Conformity**
- **Comfort – but no luxury**
- **Regionalisation of travelling**

- **Basic living – simple holidaying**
- **Close-to-home' tourism**
- **Experiences: healthy, sustainable and cheap**
- **Food: vegetarian, organic, local produce, simple**

Economic recession and nationalism

Scenarios' implications

Issue Scenarios	Company concentration	Role of SMEs	Level of emerg. competences
Scenario 1: Marco Polo Scenario	High	Medium	Medium
Scenario 2: Sunny Beach Scenario	High	Low	Low
Scenario 3: Body Shop Scenario	Medium	Medium	High
Scenario 4: The Asceticism Scenario	Low	High	Medium

Source Oxford Research 2008

Tasks and emerging competences

Main occupational function	Body Shop Scenario	Sunny Beach Scenario
General Management	• Entrepreneurship • Project management • Multicultural management • International networking • Knowledge about ICT • Knowledge about health, environment, and climate • CSR	• International financial management • Knowledge about ICT • Contract management • Rationalisation methods and techniques
Marketing	• Incorporating sustainability and CSR in corporate branding • Exploring new, individualised market segments • Employer branding	• International corporate branding
R&D	• Developing new individualised hospitality experiences • Developing sustainable resorts and healthy menus • Developing and applying ICT and internet solutions	• Developing and applying ICT and internet solutions
Production/service	• Language skills • Intercultural competences • Cooperation and team spirit • Multiskilling and flexibility • Knowledge about health, nutrition, environment and climate • ICT skills: using ICT and internet solutions	• Multiskilling and flexibility • ICT skills: using ICT and internet solutions

Changes in occupational functions

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Changes in occupational functions Catering and Canteens			
Activity	**Jobs in expansion**	**Jobs in transformation**	**Jobs in decline**
Marco Polo Scenario	•General management •Financial and adminis-trative •R&D •Logistics •Production/service management •Production/service	•General management •Financial and administrative •R&D •Logistics •Production/service management •Production/service •Marketing •Quality	
Sunny Beach Scenario		•General management •Financial and administrative •Logistics	•Marketing •R&D •Quality •Production/service
Body Shop Scenario	•General management •R&D •Logistics •Production/service management •Quality •Production/service	•Marketing •Financial and administrative	
Asceticism Scenario			•All functions

Most common skills needs and emerging competences

- **extended service skills** – different lifestyles with increased focus on health, soundness and sustainability together with the increased expectation for high quality personalised services will require more knowledge and capabilities from the personnel in most of the scenarios;

- **social and (inter)cultural skills** – also relates to the need for extended service skills, but includes cooperation ability, team spirit, self management, innovativeness, entrepreneurship, etc.;

- **skills within ICT and digitalisation** – in all of the scenarios the sector will experience the increased use of ICT and digital and online solutions in most parts of the work organisation. Thus, ICT skills are transversal and ICT skills needs must be analysed in the context of the actual application, as a part of marketing, customer service, financial management, logistics, etc.;

- **financial management –** increased globalisation, competition, company concentration and squeezed profit margins are all processes that contribute to making financial management more and more important within the Hotels and restaurants sector. One ore several of these processes are present in most of the scenarios;

- **flexibility and multiskilling** - in all of the scenarios, increased employee flexibility will be relevant in terms working hours and/or in relation to work tasks and employees qualifications, and

- **combinations of traditional hospitality skills with new specialised skills** – this is a trend prevalent in all of the scenarios, though the specific skills combinations vary. The catering industry, as an example, already today increasingly needs cooks that also have a certain level of management and administration skills in order to fill out the complex role as site managers. In general, most of the scenarios suggest an increase in new complex and highly interdisciplinary occupations and skills needs.

Companies' strategic choices

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Companies' strategic choices to meet skills needs											
Choices to meet skills needs	Change work organisation	Retrain employees	Recruit unemployed	Recruit young people	Recruit from other MS	Recruit from abroad	Off shoring and outsourcing	Impr. working conditions	Impr. career structures	Impr. sector image	Cluster initiatives
Sunny Beach Scenario	L	L	H	H	L	L	L	L	H	L	N
Body Shop Scenario	H	H	N	H	L	H	L	H	H	H	H
H: High relevance L: Low relevance N: No Relevance											

Implications for education and training

- **Greater focus on social and cultural skills** in education and training

- **Closer cooperation between industry and educational institutions** to provide 'up to date' education, retraining and upgrading of employees

- **More cooperation between hospitality schools and other educational institutions** in order to offer educations and courses with new combinations of traditional hospitality skills and new specialised skills

- **Growing need for internal training and educational programmes and facilities**

- **High quality online and digitalised learning tools** need to be further developed and more widespread

- **Development and recognition of international certification of core skills**.

- Development and improvement of **career structures including systematic education and training activities**

- **Create a culture of life long learning** in order to motivate both employ-ers and employees

Recommendations – Social Dialogue

- **The dialogue between the social partners in the Hotel and restaurants sector in general need to be strengthened.** This especially needs to be done in order to improve working conditions and employees' access to training and education. Nevertheless, social dialogue at both national and EU level should also play an important role within a broad range of urgent topics including:
  - **Exchange of information and dissemination of good practice** within recruitment, in-house training, gender equality, etc.
  - **Elaboration of tools** (guides, training manuals) on issues like sustainability, health, food hygiene, etc.

- Social partners at the EU and international level should look more closely into the possibility of **international standardisations of core skills** and competences within the hospitality industry

- Social dialogue will also have to play an important role to **create the needed culture of life long learning in the sector**

- **Special for the Catering and canteens sector:** cooperation with the EU social dialogue committees in other facility management sectors (cleaning, private security) should be initiated as the sectors are becoming increasingly integrated

Recommendations – EU

- **The questions of how to attract skilled workers** from outside the EU and how to handle the increasingly many illegal immigrants working in the Hotel and restaurants sector also call for discussions and initiatives at the EU level.

- The **EU should support the strengthening of Social Dialogue** at the EU level. Increasingly many hospitality companies are so called multinationals calling for social dialogue at the supra national level.

- In order to facilitate increased international mobility for hospitality workers **EU should initiate and support the processes of international standardisation** and certification of core skills and competences.

- **Awareness among EU decision makers on the specificities of the integrated catering and facility management sector should be heightened**. In many relations the catering sector has very divergent structures and workings compared to the rest of the hospitality sector.

- **Lastly EU should initiate and support the development of new digital learning and teaching tools within the sector**. The tools are often too expensive to develop for a single company or educational institution, but can be good value for money if disseminated widely in the industry.