

## **EU.EM.NET Project W.P 2**

### **Country report : Republic of Macedonia**

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## Characterisation of the T&H sector in Republic of Macedonia

The key actors of the T&H sectors in Macedonia are:

- Economic Chamber of Macedonia - HOTAM (hotels association) and ATAM (tourist agencies: issues related to incentives, tourism promotion...)
- Organization of Employers of Macedonia-Association of Hotels and tourist agencies: issues related to branch collective agreement
- Economic Chamber of Macedonia for Tourism
- Chambers of Commerce of Macedonia - Chamber of Tourism and hospitality: tourism promotion, incentives, international cooperation

### Main figures

- number of Hotels categorized in 5 stars in Macedonia = 197<sup>1</sup>:
  - o 5 stars = 13
  - o 4 stars = 32
  - o 3 stars = 53
  - o 2 stars = 60
  - o 1 star = 39
- number of Spa Centres for health treatment = 6<sup>2</sup>
- number of bars = 713<sup>3</sup>
- number of restaurants = 1766

### Education system

There were 8 high schools and 92 classes (some are mixed) in Travel, tourism, hotel and catering in 2009/10 and 2408 students across all years of study. This was 2.6 per cent of the total number of secondary school students in the Republic of Macedonia. Females represented 32 per cent. Compared to the school year 1997/1998, there was a slight increase in the number of students and graduates of 3.7 per cent. The number of classes also increased.

There are four areas of specialization (concentration) offered by secondary schools that are targeted towards this sector: Hotel and catering technicians (4-year program), Waiters (3-year program), Chef (3-year program) and Confectioner/Pastry Cook (3-year program).

In 2009/2010, 160 students graduated from tourism-related studies. In 1997/1998 there was only one state university offering studies in tourism and catering - the Faculty for Tourism and Catering in Ohrid.

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<sup>1</sup> Source Ministry of Economy of Republic of Macedonia, data from December 2012

<sup>2</sup> Source State Statistical Office of Republic of Macedonia, data on situation 01/08/2010

<sup>3</sup> Source "Census of the Catering capacities in Republic of Macedonia", 2008 State Statistical Office

In 2009/2010 there were 4 universities, two private and two public, offering tourism-related studies, and the supply of tourism and catering-related programs increases each year. However, while the number of students in this field of study increased by 44 per cent, the share in total students declined from 4.7 per cent to 4.2 per cent, because the total number of students in the country increased relatively more.

Besides the more traditional concentrations (Tourism or Hotels and restaurants), recently opened private and state universities offer mixed programs (similar to a double major programs) such as Tourism and business logistics or Business logistics, gastronomy and diet, at the State University GoceDelcev in Stip (opened in 2008/2009). There is also an apparent mixing of tourism and catering with gastronomy. All study programs are designed in line with Bologna Declaration requirements, and studies are organised as 3 years undergraduate plus 2 years graduate (Master) studies. Some also offer a specialist degree. The leading faculty is still the Faculty for Tourism and Catering – Ohrid, where 69 per cent of all students in this field of study are enrolled. There is now a subsidiary of this Faculty in another city, Veles. However, despite its modernisation, the National Strategy for Tourism Development 2009-2013 argues that the quality of studies and especially the learning of practical skills (for example, in catering) is low. It suggests that the Faculty also has insufficient resources in terms of space, laboratories and cabinets for practical learning<sup>4</sup>.

### General information

In Republic of Macedonia the public sector, i.e Employment Service Agency is conducting Skills Needs Analysis (SNA) survey as part of their annual activities as an input in the design of the Active Labor Market Measures. The main purpose of the survey is to collect information about the workforce fluctuation in the previous year and the employers' expectations as regards recruitments in the next twelve months. The key objective of the SNA is to increase the ESA knowledge about the situation and the expected changes on the labour market by gaining information from employers, about future recruitments and the required occupations and skills of new employees as well as information about the demand for workforce which employers cannot meet, like occupations shortage. However, it has been noted in the EU reports that at "certain point the methodology for the SNA should be revised and upgraded in order to better reflect the labor market skill needs" - source Functional Review of Employment Service Agency

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<sup>4</sup> source Skills Policies for Economic Diversification in the Republic of Macedonia Enhancing local skills policies for the food and tourism sectors p.54-55

## Inform / Promote / attract

### Promotion and marketing around the T&H sector in Republic of Macedonia

There is no specific promotion of the professions related to the T&H sector. In general there are more efforts displayed to promote Macedonia as tourist destination, to create incentives for the T&H businesses such as lower VAT for overnights, brief the economic side of the business sector rather than promoting skills and labor force requirements.

The growing supply of and enrolment in tourism and catering higher education may be partly a consequence of growth in higher education generally, but may also be related to an increased demand for such profile of workers, as practices in the sector converge on those in other countries. Much lower share of HoReCa employees in the Republic of Macedonia are qualified to degree level or above than in comparable neighbouring countries. In the national legislation (the Law on Catering Activity), there is a requirement that only the manager of hotels with 4 or more stars and of catering premise categorized with 4-stars or more must hold at least a bachelor degree. However businesses may value higher levels of qualification for business rather than legal reasons<sup>5</sup>.

There was **campaign** (2012) financed by the state "You are the face of your country, from the tourism we are all gaining: good hosts for better tourism" with aim to raise awareness over the behaviour of the hospitality workers towards tourists (episodes of mocking sketches) with uncertain effects, no evaluation reports available (link to the campaign videos [http://www.youtube.com/channel/UCcL\\_CXbuzV33IOP2shhC7cQ](http://www.youtube.com/channel/UCcL_CXbuzV33IOP2shhC7cQ))

**Contests** exist at regional and European level, mainly for catering and cooking.

Concerning the promotion of the sector in schools, a system of career guidance is not yet well developed, and this 'service' is left to school psychologists or pedagogues. Career guidance is therefore mainly delivered to pupils and students by the Employment Service Agency and is tied to immediate decisions that must be made at school leaving age.

On the other hand the VET schools are trying to increase their attractiveness by including their schools in various international organizations such as the Association of European Hotel and Tourism Schools (AEHT), the International Association of hotel schools EUHOFA and by building partnership with EU based VET schools like for example the Tech College Aalborg and its Food College. In 2012 the AEHT

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<sup>5</sup>Republic of Macedonia, Government program 2013 for the Tourism sector (<http://vlada.mk/node/266?language=en-gb>)

International Conference was organized in Macedonia. The T&H VET school students are also actively participating in the European and Regional T&H competitions (see below).

The national holidays or entertainment events (winning Guinness record) are also occasions where the visibility of the Hand T profession is promoted to the public.

### **T&H jobs visibility in Republic of Macedonia**

The following jobs are formally identified in Macedonia:

- 3 year VET school education
  - o Waiter
  - o Cooker
  - o Pastry maker
  - o Baker
- 4 years VET
  - o hotel-tourism technician (usually finds job as hotel receptionist or tourist agency worker usually they have to take special course to be IATA certified)
- University education
  - o BA in Hotel and Restaurant Management
  - o BA in Tourism
  - o BA in Gastronomy
  - o MA in Tourism management
  - o MA in Hotel management

However, there is no standards description for the required competences when publishing announcement by the employers, usually some minimum requirements (such speaking of foreign language, possessing IATA certificate) of the employer for the positions is given. While the competences are subject of definition when designing the standards for professions such are: Pastry maker; Cooker (chef); waiter by the Centre for VET and the employers. This process was initiated in 2012 with an IPA funded project where the three above mentioned professions issues of the VET in T&H schools were included. However the process of transferring the defined standards into the teaching program is next step of the reform of the VET 3 schools. While with EU PHARE instrument the VET 4 T&H schools have been reformed.

Again, there is not a specific career path definition for the T&H sector in Macedonia but there is opportunity for the students that will finalize VET 4 T&H program to continue at higher education level 6 and 7. Generally it is perceived that students that do not succeed to get entry in the general gymnasia or some more attractive vocational high school (economic-legal sector, health sector, electro-technical and or mechanical) or students who have financial problems are usually opting for professions that provide

employment after high school (catering-tourist, graphic technology, geology, etc.). 5.90% (898) of the 15000 students that finish VET 4 secondary schools each year are from the T&H sector.

According to the evaluation of the reform of the VET T&H schools the teachers in catering and tourism profession are committed to developing the knowledge of several foreign languages, communication and ethics.

Some of the companies that employ people from the economic, legal and catering profession say it is needed to add new subjects or topics that will strengthen students' competencies in terms of creating business mindset and enhancing the relationship with the customers. The employers according to the "Collaborative evaluation of the VET 4 reform" also emphasized readiness for more active involvement in the work of the VET 4 schools and providing information on new developments that occur in certain sections of this profession. In general the employers, the universities and the graduating VET students emphasize the lack of soft skills among new arrivals (team work, leadership, self-initiative, creativity, communication skills, etc.). Apparently the program contains topics that address this skills but it seems that the answer should be sought in the ways of valuing students' achievements. It is possible to assume that the assessment of pupils' progress is still focused in assessing their knowledge (mostly through tests of knowledge) rather than the skills they possess much less than the competencies. This phenomenon was addressed in the National Programme for the Development of Education 2005-2015 and as part of its recommendations was the transition from factual to goal-oriented evaluation that will take into account students' competencies and not just knowledge. It is obvious that these suggestions have not yet found application in practice.

List of existing **associations** in Republic of Macedonia:

- HOTAM – Hotel association of Macedonia
- ATAM - Association of Tourist Agencies of Macedonia
- Economic Chamber of Macedonia – T&H association (cooperating in capacity of social partner with the VET education institutions)
- Chamber of Crafts – representing the crafts self-employed such as bakers, pastry makers etc. cooperation in capacity of social partner with the VET education institutions
- Organization of employers of Macedonia - T&H association (arranging collective agreements in T&H sector)

## Develop and Train Workforce

### Existing training and levels qualification in Republic of Macedonia

#### Main qualification level figures:

- level 4 : Post-secondary non-tertiary education 67%
- level 5 : Short-cycle tertiary education 2.7%
- level 6 : Bachelor's or equivalent level 7 %

The numbers of faculties that offer higher education in tourism and hospitality has raised both state and private. However there is no specific promotion of the professions gained through higher education in tourism and hospitality. There is tendency besides the more traditional concentrations (Tourism or Hotels and restaurants), recently opened private and state universities to offer mixed programs (similar to a double major programs) such as Tourism and business logistics or Business logistics, gastronomy and diet, at the State University Goce Delcev in Stip (opened in 2008/2009). There is also an apparent mixing of tourism and catering with gastronomy. All study programs are designed in line with Bologna Declaration requirements, and studies are organised as 3 years undergraduate plus 2 years graduate (Master) studies. Some also offer a specialist degree. The leading faculty is still the Faculty for Tourism and Catering – Ohrid, where 69 per cent of all students in this field of study are enrolled. There is now a subsidiary of this Faculty in another city, Veles. However, despite its modernisation, the National Strategy for Tourism Development 2009-2013 argues that the quality of studies and especially the learning of practical skills (for example, in catering) are low. It suggests that the Faculty also has insufficient resources in terms of space, laboratories and cabinets for practical learning.

Recently, the 4-year vocational secondary education was reformed in four phases over the period 1998-2006. The reforms addressed reduction of the number of profiles, modernisation of curriculums, purchase of equipment for schools, and training of teachers. Unfortunately, the 3-year vocational education was not reformed and the curricula still dates from the period of ex-Yugoslavia (from 1989).

Tourism-related programs in secondary vocational schools comprise of:

- 44 % general topics;
- 36 % tourism related topics (Tourism, Tourism geography, Travel agency and hotels activity, tourism economics, etc);
- 12 % practical training, in school's premises or as part of an internship;
- 8 % of elective topics.

When it comes to employment the Hotels and catering companies often employ workers with completed vocational profiles other than tourism/catering. The practice of recruiting people with other types of qualification is related to employers' perception of low graduate quality from tourism and catering secondary vocational education, as well as the low cost of initial on-the-job training.



These changes have been identified thanks to a collaborative analysis from 2010 that is assessing the impact of the reforms undertaken in the VET 4 year schools, where the students' practical training in companies is often a highlighted problem by the persons involved in the survey, whether teachers, university teachers, students, employed, unemployed or employers. The focus of the remarks is placed on the organization and realization of the practical training of the students in the companies. The practical work is mostly formal and is based on the established cooperation agreements between the VET School and companies that are derived from personal contacts and acquaintances of the stakeholders.

There are processes in place in order to enhance the link between the labor market and the education system by ensuring standardized practical work and match for future employments. The following activities are part of this process:

- standards for the practical training of the students at the employers premises (requirements for the premises, the staff, role and responsibilities of the school, the parents, the students, the employers, the tutors, the chambers, the public authorities – policy makers) – already done by the Centre for VET
- verification of fulfilment of the conditions for practical work (future activities of the Chambers)
- creation of Register for verification of the employers (future activities of the Chambers)

In order to allow access of the schools to input information of the students profiles

## Quality and certification in Republic of Macedonia

### Training organisms and employer's link; development of curricula in Republic of Macedonia

Macedonian T&H VET schools are participating in the activities of the Association of European Hotel and Tourism Schools (AEHT), the International Association of hotel schools EUHOFA and are building partnership with EU based VET schools like for example the Tech College Aalborg and its Food College. In 2012 the AEHT international conference was organized in Macedonia. The T&H VET school students are also actively participating in the European and Regional T&H competitions

The ECTS is adopted in the higher education programmes, i.e Universities. However the ECVET for the high school formal and non-formal education is not yet in place. The reforms of secondary education system are long and so far only the 4year VET programs have been reformed, the three year and 2 year are to be reformed. The process of definition of standards of professions together with associated knowledge, skills, and competences is in initial stage so far only 51 qualifications being defined for about 13 professions. The process of integrating the defined qualification into the teaching programmes still

hasn't taken place. There is recently adopted the long waited strategy for the Vocation education and training 2013-2020.

According to the National plan for adoption of the acquis 2013, the relevant institutions are planning to take further steps in the development of the NQF, for this purpose a working group is set comprised of representatives from the Ministry of education and science, the Center for VET, the Centre for adult education and the Office for education development.

The short term country priorities are:

- Adoption of the Law on National Qualifications Framework, which will regulate the levels, types and scope of qualifications and competencies of the bodies that are proposing and are adopting the qualifications in line with the European Qualifications Framework;
- Further development and implementation of the National Qualifications Framework in the context of lifelong learning.

As a conclusion and in this context it is too early to know how it will apply to the T&H sector, mainly because there is a lack of awareness and a lack of perceived benefits.

The **partnership** with the companies is manifested differently depending on the profession. Dominantly, this partnership is viewed only in terms of realization of the students' practical training in companies. For example, most problems in the realization of this cooperation have the economic, legal and commercial sector, forestry-wood processing, textile-leather and agricultural sectors. The best results in this cooperation have the health, mechanical and geological and mining profession and partly the catering and tourism.

The practical work in the school is implemented in the existing schools cabinets and in the facilities of the social partners. The practical and the theoretical knowledge of the students is checked through the summer practice that lasts 20 days, as well as through the 10-day professional practice of the students in the graduating classes at the social partners facilities during the high seasons holidays, such is New Year. So far the practical work takes 12% of the time planned for the T&H programs in the VET high schools. The practical work according to the teachers is mostly formal and is based on the established cooperation agreements between the VET School and companies that are derived from personal contacts and acquaintances of the stakeholders. Thus the cooperation is still not yet systematic. The ongoing reform undertaken at central level by the Centre for VET is aiming to advance the situation in these relations, please see standards for practical work and register of verified employers for practical work.

There is presently no incentive, promotion or system solution that would increase employer investment in employee training and development in the T&H sector. According to the Collaborative study of the VET reform the employers do not have an incentive to cooperate with the schools, though they say that

they are willing to help schools develop better study plans, perhaps provide co-mentors for students, provide in-work training for teachers, etc. The lack of incentive for cooperation among employers might be due to a lack of knowledge about the institutional set-up regarding educational policy and the general dissatisfaction with the vocational education and training system.

However worth noting that priority activities of the Center for VET are:

- To make operational the rights of the employers to gain financial, customs and statutory tax incentives for stimulating them to be involved in the education process of the students
- Preparation of mentors to work with students on practical training in companies
- Verification of eligible employers who implement practical training

Constantly building, updating and using of the Register of Employers that meet the requirements for the implementation of practical training

The T&H business community in general expresses dissatisfaction with the quality of the graduates from tourism and catering-related secondary schools (National Strategy for Tourism Development 2009-2013). It is claimed that current study programs do not install the right skills for future tourism industry employees. The prevailing view is that they are weak in practical skills because the teaching and learning is overly focused on theory and training facilities and conditions are poor. Hence it is said that graduates are not well prepared for the world of work. In addition, it is claimed that students are poorly motivated because work in this sector is not highly valued by society.

**The new technologies** such as the ICT are available in the process of education, however it is to be noted according to the evaluation of the reforms in the VET schools that related to the evaluation of the students by the teachers, mostly the students are directed to learning by heart method rather than applying the gathered knowledge, in this sense also rarely using the IT technology in the teaching process as a didactic medium.

Employers' participation and investment in the apprenticeship and training system are formally encouraged but without any existing systematic solution or support to the employers in the reality the employers' participation and investment in the apprenticeship and training system is inexistent

Locally the best practice for partnerships between employers' and schools is in the health sector where the medical VET schools have excellent cooperation with the hospitals and clinic centre (publically funded). However it is difficult to replicate this example since the H&T establishments are privately held in 99.99% thus the stimulus for the employers to engage more in the partnerships with the schools should be encouraged with some sort of incentives using eventually EU experience.

## **Retain workforce in the T&H sector in Republic of Macedonia**

There are no real retention strategies in the T&H sector. Mature workers are sometimes proposed to mentor and train new ones, and students are engaged in summer time practice during one month

## **Skills anticipation (forecasting) in the T&H sector in Republic of Macedonia**

### **General information**

Unfortunately, the country has yet to put in place a system for skills forecasting, such as projections of occupations that will be in demand in the medium- to long-run, which can be effectively used for designing an appropriate education policy. The Employment Service Agency is carrying out an employers' survey called a Skill Needs Analysis (SNA) since 2007. The Skill Needs Analysis has the primary goal of acquiring information from employers about short term recruitment over the past 6-12 months, needs for specific occupations, needs for skills, and occupation shortages. Data are collected through a questionnaire that is sent to a random selection of companies with more than 10 employees divided in eight groups in accordance with the National Classification of Activities. However, the findings (and the purpose) of this survey is not to plan future educational or vocational programs, but to detect short-term occupational shortages and train unemployed in those specific occupations. These analyses focus both on current state and future needs shortages on jobs.

There are not evidenced activities for anticipation of identification of the needs in the T&H sector. The dialogue and cooperation between the employers and the creators of occupational standards/teaching programs/employment service centers is not yet set at level to ensure active involvement of the employers in any forecasting process, there are even difficulties to link the real actual needs of skills for the labour market with the training programs and methods for creating those skills among the graduated students.

The assignments for the Skills needs analysis are from the Ministry of Labour and Social Policy, the executive body is the Employment service agency, the outcome is used primarily to train unemployed in the identified lacking specific occupations, to design future active labour measures and policy; also the outcomes are giving some indications for the education sector without any significant influence.

### **Methods used**

The SNA is mainly responding to the scope of the Ministry of labour and social policy for the National employment strategy and the active labour measures it is not yet giving full information on the skills needs that can be used and influence the education policy. Main institutions involved are the Employment Service Agency and the individual employers. The associations of employers are not directly involved in the survey.

However, the social partners are involved in the Council for VET (independent gov. body) having advisory role for matching labor market needs with the education. Still proactive collaboration, besides signed memorandums of understandings between relevant public (Center for VET...) and private institutions - employers is lacking.

**Weaknesses:**

- too formal
- lack of proactive role of the public competent institutions
- lack of awareness/knowledge and pro activity of the social partner institutions, i.e. the employers' associations
- lack of Human resources and lack of appropriate capacities for performing skills forecast both public and private side

**Strength:**

- recognition both public and private actors that skills forecasting is necessary for shaping up the education policy and envisage modernization of teaching methods

**Trends in the next 5-10 years**

Over the next 5-10 years it is likely that main training needs in the T&H sector will be:

- Increasing the "soft skills" of the students (team work, leadership, self-initiative, creativity, communication skills)
- Language skills

Creating critical mind and personal initiative, business mindset and enhancing the relationship with the customers.

These needs are not much different to the last 5-10 years.

**Main evolution of the sector in the coming years**

There are opportunities considered to be well paid for T&H jobs on cruisers and/or USA. The seasonal character of the T&H jobs is attractive for many students that use the summer to work as tourism workers in Greece and/or on cruiser and USA. There is in this sense specialized private employment agency functioning in the last 10 years in this field also offering trainings for those that are candidates to work abroad in the T&H sector. There is no evidence of the number of people leaving Macedonia during summer time or leaving the country for longer period to be recruited and work in the T&H sector abroad.

## Promoting T&H professions Europe-wide

### Benefits

- Higher mobility of the work force
- Promotion of travelling and getting to know better among ourselves
- Learning other habits, traditions, food
- Exchange of best practice, comparable knowledge and experience
- Promotion of undiscovered tourism corners and their features

### Risks

- It might be not sensitive to individual typical country features and mentalities therefore be inapplicable in all countries.

## Existing best practices in Republic of Macedonia

There are no best practices identified so far but without serious treatment by the employers or the public institution.

# APPENDIX