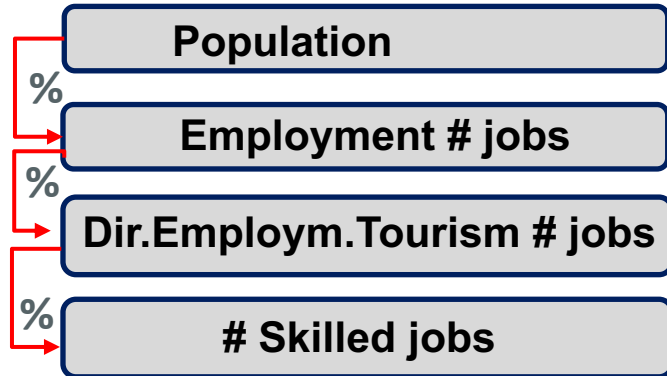# CAREC Tourism Capacity Building

**Presentation
Turkistan 2-4 April, 2024**
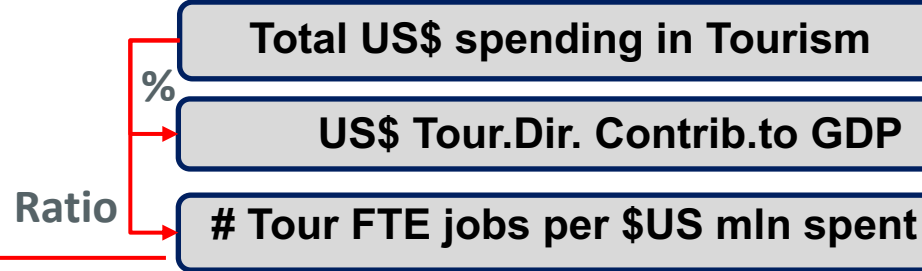
Capacity building drivers

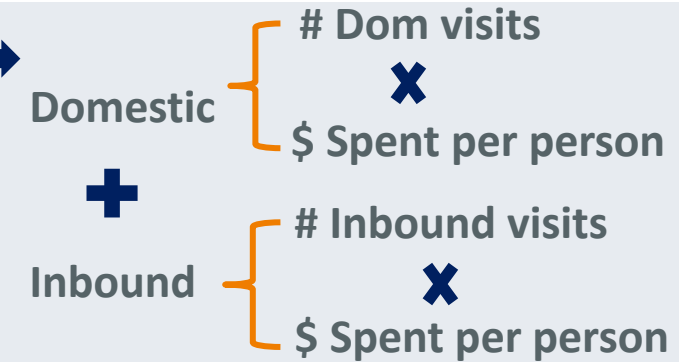**Jobs**
- Population
- Employment # jobs
- Dir.Employm.Tourism # jobs
- # Skilled jobs

% (between Population and Employment # jobs)
% (between Employment # jobs and Dir.Employm.Tourism # jobs)
% (between Dir.Employm.Tourism # jobs and # Skilled jobs)

US$ Value & contribution
- Total US$ spending in Tourism
- US$ Tour.Dir. Contrib.to GDP
- # Tour FTE jobs per $US mln spent

%
Ratio

Critical drivers

Domestic
- # Dom visits
  ✗
- $ Spent per person

+

Inbound
- # Inbound visits
  ✗
- $ Spent per person

(1 – rate of unskilled labour force)

Skills supply & demand
- On the job training
- By Edu Institution
- By Higher EDU
- By TVET

%
%
%
%
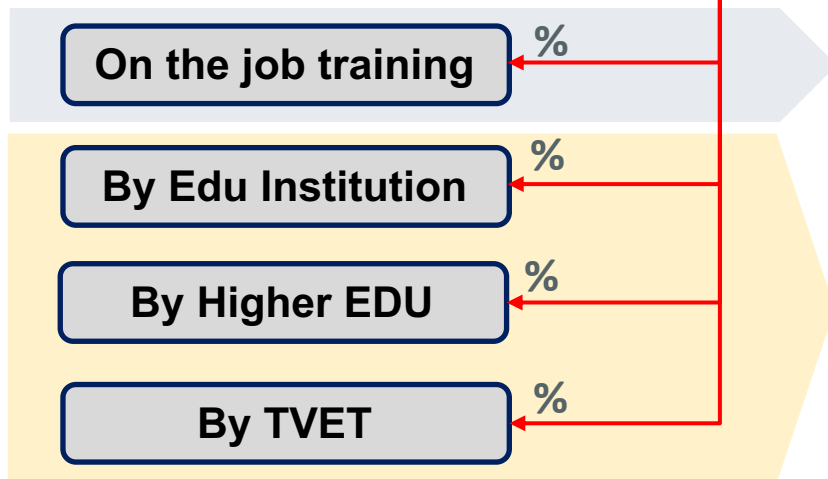
Success rate % = # retained 3Yr/ # entrants
Rotation rate % = replacement rate %
$ Cost per # new entrant staff

Success rate % = # retained 3Yr/ # entrants
Rotation rate % = replacement rate %
$ Cost per new entrant with formal skills

- **Gap = Demand – Supply**
- **Cost per student is the least important element**
- **On the job training is a myth: the hidden costs for employers is very high compared to structured formal systems**

Capacity building drivers

The CAREC Tourism Skills report estimated that, despite the covid 19 pandemic, tourism direct employment in the region would grow at 2.41% per year, reaching some 5.2 million jobs by 2028

Country	Dir.Empl.Tourism # Jobs			
	2018	2028	CAGR	CAREC %
PAK	1 534 804	2 008 000	2,72%	38,64%
IMAR	1 038 062	1 245 837	1,84%	23,97%
XUAR	708 631	879 049	2,18%	16,92%
KAZ	186 249	265 000	3,59%	5,10%
AZE	181 655	246 000	3,08%	4,73%
GEO	141 680	161 000	1,29%	3,10%
UZB	98 901	111 000	1,16%	2,14%
TAJ	69 722	94 000	3,03%	1,81%
TKM	66 055	88 856	3,01%	1,71%
KGZ	35 145	50 000	3,59%	0,96%
MON	35 190	48 000	3,15%	0,92%
CAREC	**4 096 094**	**5 196 742**	**2,41%**	**100,00%**

- Pakistan, the largest populated CAREC subregion leads in number and growth rates

- ABEC enjoys the greatest growth rates of 3.6% pa

- PAK + XUAR + IMAR represent 79.5% of all CAREC tourism job creation

Capacity building drivers

The CAREC labour Tourism Skills GAP is around 78 K workers per year. There are imbalances between countries in skilled labour entering the market, with largest GAP in TVET

Country	A - Avg yr add #Jobs	B - # grad enroled	C (50% of B) Skilled grads to Mkt	D (10% of A) Replacement #jobs	E (25% of A+D) % unskilled labour Trsm	F (A+D-E) # yr skilled workers needed	G (F-C) Yr Gap of skilled workers
PAK	47 320	6 000	3 000	4 732	13 013	39 039	36 039
IMAR	20 778	2 722	1 361	2 078	5 714	17 141	15 780
XUAR	17 042	na		1 704	4 686	14 059	14 059
KAZ	7 875	1 158	579	788	2 166	6 497	5 918
AZE	6 435	1 410	705	643	1 769	5 308	4 603
GEO	1 932	1 455	728	193	531	1 594	866
UZB	1 210	2 308	1 154	121	333	998	-156
TAJ	2 428	619	310	243	668	2 003	1 693
TKM	2 280	na		228	627	1 881	1 881
KGZ	1 486	5 410	2 705	149	409	1 226	-1 479
MON	1 281	4 597	2 299	128	352	1 057	-1 242
CAREC	**110 065**	**25 679**	**12 840**	**11 006**	**30 268**	**90 803**	**77 964**

- The largest gaps are in Pakistan, IMAR and XUAR*

- Some countries have more qualified entrants than needed, meaning that other sectors absorb them, and/ or there is an imbalance between the levels of formal skills provided and those absorbable +by the market (ex. higher education vs TVET).

*It is probably less because there is no information of the amount af graduates in XUAR and TKM

SWOT analysis of Tourism skills in CAREC Countries

Strengths

- Governments support for the tourism education and training system

- The major building blocks of the tourism education and training system are in place

- Willingness of the tourism education and training providers to transform the system

Weaknesses

- Weak stakeholder coordination and partnership

- Diversity of skills not addressed by the current system

- Weak training culture in the industry

- Tourism professions often lack high prestige

- Shortage of international certified qualifications

- International student and faculty exchange mechanism is not formalized

- Limited experience with international partnerships for tourism education and training institutions

- Limited experience of universities and training institutions in offering remote learning

Opportunities

- Fast growth of tourism will result in strong demand growth for tourism professionals

- Tourism will offer significantly more diversified employment opportunities

- Tourism offers a wide range of business opportunities, especially valuable for youth, women and rural communities

- Providing current knowledge on tourism crisis management to tourism policymakers to ensure resilience

- Providing high quality training on topics such as security, safety, cleanliness and hygiene improves resilience

- The introduction of online teaching and tourism education and training institutions can capitalize on greater willingness to use, after covid-19.

Threats

- Lack of financial resources to address the volume of people to be educated and trained

- Weak attention to quality in tourism skills provision

- Tourism education and training institutions not embracing online/remote learning

- Not providing the necessary knowledge and skills to support new business models may hinder the development of the tourism industry in the region

- Geopolitical conflicts can reduce demand for quality

Main recommendations for skills improvement in CAREC Countries

- **SR 1: Promote Online Training and Skills Development.** Online tourism skills development is in its infancy in CAREC countries, but this mode of learning is increasingly recognized as a credible tool for tourism skills development. The COVID-19 crisis accelerated the already existing trend of remote work and distance learning, giving further impetus to develop online learning solutions for the region.

- **SR 2: Support Intra-Regional Partnerships and Knowledge Exchange in Tourism Skills Development**. There is currently no mechanism in place for cooperation in tourism skills development among CAREC countries. At the same time, there is a strong desire for increased international cooperation by public and private sector organisations. This includes recognizibility and accreditation of certificates.

- **SR 3: Raise Quality and Align Tourism Education and Training** with Industry Needs through UNWTO.TedQual Certification. There is a need to strengthen quality of tourism education and training and to bridge the gap between tourism industry expectations and education and training delivery, and to strengthen the alignment of tourism skills development in the CAREC countries with international standards and best practices.

- **SR 4: Improve Tourism Labour Market Intelligence**. Currently the linkages between tourism labor market intelligence and skills development are weak. This hinders policymaking and curriculum development. Information paucity is prevalent, and the available data are fragmented and inconsistent. None of the countries in the region have completed the employment table (#7) of a Tourism Satellite Account, except Kyrgyz Republic.

Thank you