BALANCE OF COMPETENCES IN THE TOURISM INDUSTRY

Report on the conducted research

Report commissioned by the Cracow City Hall, prepared by the Centre for Evaluation and Analysis of Public Policies and the Interdisciplinary Centre for Organisational Research and Development Jagiellonian University

Cracow, November 2015

ABSTRACT

This report presents the results of research conducted as part of the project "Balance of competences of Cracow research centre" in the tourism industry. Tourism is one of the most important industries for development of the city, which additionally has a considerable impact on other segments of economy of Cracow. For the purposes of this research, somewhat limited definition of the industry, focusing on the companies operating in the areas of **tourism organisation, provision of tourist information and hotel industry and accommodation** was adopted. According to experts, the tourism industry has been developing strongly in the recent years, and the successive years should be even more successful for it.

As part of the work carried out, based on the analysis of job advertisements and in-depth interviews with opinion leaders and representatives of companies, a few dozen of competences expected from graduates of Cracow universities, which have different importance for development of the tourism industry, were inventoried. These competences are divided into four areas: **specialist knowledge and skills** (15 competences), **business knowledge and skills** (7 competences), **soft skills** (11 competences) and **language skills and other requirements** (10 competences). In consecutive steps, quantitative research on demand for competences (24 companies employing over 1000 employees), which were then set within a balance against the results concerning the supply of competences (9 subjects, 25 specialisations – which more than 1,200 students will graduate from in 2016) were conducted.

On the side of demand analysis, the report includes information on the most important competences currently sought by employers – in the tourism industry, these are, among others, **English, integrity, customer focus, care for quality/conscientiousness, organisation of own work, presentation and propriety, time flexibility and mobility, verbal and written communication** and **sales**. Within the next five years, all of the above will still be important, however, the following will gain in importance most significantly: **initiative/innovativeness, verbal and written communication, customer focus, German, Russian, French, Spanish, comparing offers/searching out information**. In the case of language skills, bilingualism – knowledge of English and other foreign language – is growing in particular importance.

From among the significant competences, in the tourism industry it is the hardest to find on the labour market those which are associated with **initiative/innovativeness, sales, customer focus, organisation of own work, coping with stress** and **knowledge of business etiquette**.

Representatives of companies operating in the tourism industry are very optimistic about the future and predict an increase in the dynamics of employment of graduates. The report also includes information on the positions for which Cracow employers in the analysed industries recruit most often.

The side of supply analysis provides information about the subjects of study whose profiles, according to the employers, correspond best to the needs of the tourism industry and the assessment of achieving effects of education important from the point of view of employers. From among the competences important to employers, those obtained most often, according to the universities, include **integrity, knowledge about Poland, preparing offers/tourist programmes, law, regulations and standards in tourism, knowledge of the industry and new trends, cooperation, establishing relationships** and **passion/interest in working in the industry**.

Cooperation of universities and representatives of business is not of a systemic nature, but declarations of companies and universities show that there is a will and readiness to develop it on both sides. Representatives of the City Hall cooperate well with universities and industry organisations (e.g. the study of tourist flows) and business (e.g. Tourism Forum). Even though there are some concerns and important challenges facing Cracow, which we mention in the report, at the general level cooperation with the city is assessed extremely positively. Cooperation of the city and the province is perceived equally well. This is certainly conducive to creating a good atmosphere around the tourism industry in Cracow.

There is no quantitative shortage of personnel in the analysed industry. What is bothering the companies is the **quality of competences of some graduates**, which is also expressed by the representatives of higher education institutions who point to the risks associated with lower motivation and commitment of students. An important factor is also the pressure on the labour market exerted by other industries (including BPO/SSC), which significantly impedes talent acquisition by tourist companies. According to experts, however, the problem is primarily recruitment for specialist and managerial positions.

At the end, the report presents conclusions resulting from the analyses along with suggestions of activities aimed at development of universities and companies operating in the industry.

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INTRODUCTION

Thanks to the initiative and commitment of the Cracow City Hall, for the fourth time we have the pleasure to present the results of the "Balance of competences of Cracow research centre" devoted to the relationship between demand and supply of competences in key areas of functioning of business and universities. In previous years, the scope of research included 9 industries:[1] BPO and ITO, life science, power industry, creative industry, passive construction and energy-saving construction, construction industry, architectural industry, computer industry together with IT technologies. In 2015, work focused on the following industries:

1. **Tourism**
2. Transport and logistics
3. Cross-cutting research of foreign languages

This year, a unique solution was the extension of strictly industrial research to the cross-cutting research of supply and demand related to foreign languages. Although the research was conducted locally and focuses on Cracow, the effects have a countrywide impact, being, e.g., an inspiration to carry out nationwide industry research as part of the programme Study of Human Capital.

Similarly to the previous years, the reports present demand of Cracow companies for specific competences on the one hand, and supply of competences of the Cracow higher education institutions on the other hand. The objectives set before the research team, which focus around the questions about the expectations of employers related to the graduates of Cracow universities and the actual level of education of these competences in the education industry, have not changed. In terms of the methodology used, in comparison with research conducted in 2013 and 2014, except for the Balance of foreign languages carried out for the first time, there have been no major changes. All the modifications introduced were to reduce the burden of time for the respondents, while maintaining high quality of collected data.

The conclusions presented in the reports have been formulated on the basis of questionnaires and a few dozen of interviews with industry experts, representatives of companies and higher education institutions. The subject of research were also recruitment advertisements and, to a lesser extent, the documents related to the curriculum in selected subjects of study at the universities. In the case of the Balance of languages, surveys among students and in language schools, interviews with the representatives of recruitment companies and a detailed analysis of job advertisements were carried out additionally.

The project was commissioned by the Cracow City Hall and implemented by the Centre for Evaluation and Analysis of Public Policies of the Jagiellonian University (UJ) and the Interdisciplinary Centre for Organisational Research and Development at the UJ Institute of Psychology. It would not be possible to conduct research if not for the kindness and professional support of representatives of the CCH, the PLO in Cracow, business, representatives of Cracow universities and language schools, business environment institutions and students. In particular, we would like to thank, at the same time taking full responsibility as the research team for any

[1] Research carried out in 2012 and 2013 was commissioned by the Cracow City Hall and the Provincial Labour Office in Cracow; in 2014, as a supplement to research in the construction industry, research commissioned by the PLO in Cracow was conducted at the level of upper-secondary schools.

possible imperfections and shortcomings of the report, the **ASPIRE Association**, the partner of the Balance of foreign languages.

We owe special thanks to (in alphabetical order):

- Industry experts and people who enabled us to understand the essence of functioning of all the analysed industries in a broader context and submitted their comments, often very critical, improving the quality of tools and definitions used: Małgorzata Bednarczyk (Jagiellonian University), Adam Biernat (Provincial Labour Office in Cracow), Barbara Bukowska (Tourist Guides Association in Cracow), Mirosław Furmanek (Provincial Labour Office in Cracow), Andrew Hallam (ASPIRE), Grzegorz Jurczyk (Quality Centre of the Cracow University of Technology), Joanna Kaim-Kerth (ASPIRE), Wojciech Kardas (Wo-Kar), Zygmunt Kruczek (University of Physical Education; Małopolska Tourist Guides Association), Rafał Kulczycki (Cracow City Hall), Konrad Kuźma (Cracow City Hall), Maria Leńczuk (Provincial Labour Office in Cracow), Wojciech Liszka (Z-Factor), Piotr Litwiński (Association of International Road Transport Carriers; Litwiński), Anna Malina (University of Economics), Joanna Ostrowska (Kossak Hotel), Dariusz Pastuła (Aon Corporation), Artur Paszko (Kraków Nowa Huta Przyszłości), Jan Paździorko (F.H.U. Liber), Rafał Perłowski (Cracow City Hall), Agata Piątek (Hays), Andrzej Poznański (Cracow City Hall), Jerzy Raciborski (University of Physical Education), Magdalena Radwan (AG Test HR), Tomasz Turaj (Nowe Centrum Administracyjne), Jan Sala (University of Economics), Andrzej Sowa (Cracow University of Technology), Monika Stawicka (Jagiellonian Language Centre), Andrzej Witek (Witek Hotel-Conference Centre), Katarzyna Wysocka (Cracow City Hall), Tomasz Ziaja (MTD Tomasz Ziaja),

- Representatives of companies from the tourism industry:[2] AMICUS, BUP WĘDROWIEC Kraków, Witek Hotel-Conference Centre, Cracovia Travel, Destination Poland, Figa Klementowski i Wspólnicy, Atlantis Hostel, Orange Hostel, Kossak Hotel, Krakowskie Przedsiębiorstwo Hotelarsko-Turystyczne, MKG, Osti-hotele Zbigniew Ostachowski, Park Inn, Pavo Travel, Radisson Blu, Top Travel Service, UBX Cracow, Z-Factor,

- Representatives of universities associated with the tourism industry: AGH University of Science and Technology (Faculty of Geology, Geophysics and Environmental Protection), University of Physical Education (Faculty of Tourism and Leisure), University of Economics (Management Faculty), Jagiellonian University (Faculty of Management and Social Communication), Pedagogical University (Faculty of Geography and Biology; Faculty of Humanities).

Like in previous years, we have tried to write individual reports in such a way so that, on the one hand, employers, universities, public authorities as well as students and graduates could use them independently, and on the other hand, so that they could form a bridge and a medium of communication between these groups. We believe that the presented results of research will remain a permanent element of discussions about the relationship between the labour market and the education sector in Poland.

[2] The list of companies takes into account only entities which have agreed to put their names in the report. Both in the case of companies and higher education institutions, the list takes into account the institutions which filled in partially or fully the research questionnaire or took part in in-depth interviews.

RESEARCH TEAM

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BASIC ASSUMPTIONS OF THE BALANCE[3]

In the presented research, there have been no major changes in the basic assumptions and methodology used, compared to the research from 2013 and 2014. In order to ease time burden for the respondents, an attempt to reduce the list of soft and business skills by integrating them into more general categories was made. The question of responsibility attributed to higher education institutions for the education of individual competences was also eliminated – the response pattern of the previous years was consistent between remote branches and in the opinion of the team the benefit from the repetition of research in this area is much smaller than the costs associated with it. In previous years, it turned out that even though representatives of business expect developed soft and business skills from the graduates, they do not share the opinion that higher education institutions should be responsible for their education to the largest extent. Sources of development of this group of competences such as earlier levels of education and involvement of parents and guardians were indicated equally often. Representatives of universities felt responsible for development of soft skills of their graduates to a greater extent, although they indicated difficulties in carrying out this task. When it comes to specialist competences (knowledge and skills), in the vast majority of cases both business and universities were of the same opinion that it is the responsibility of higher education.

One of the most important objectives of the report is to present opinions of industry experts, representatives of companies and universities on the state of competences of graduates of Cracow schools without oversimplification and evaluation. Even though this was a considerable challenge, we have made every effort to present the flow of intellectual capital from universities to business, mutual expectations and adopted attitudes in an objective way.

Like in the previous years, the balance of competences starts from the analysis of the needs of Cracow enterprises. In this regard, we tried to maintain the previously established standard of not creating assumptions as regards the necessity of absolute matching of the educational offer to the current shape of the labour market. In our opinion, requirements of employers should be one of the main factors taken into account when creating curricula, but certainly not the only one. Similarly, it is impossible, in our opinion, to maintain the view that possible cooperation problems arise only from the lack of willingness of employers and their ability to use the potential which the universities possess.

Like in the previous editions of the project, the term "competence" shall be understood in this report as: "a set of behaviours belonging to a common category, enabling effective implementation of organisation's objectives and tasks in a given position, determined by various psychological factors." In this sense, competences are sets of behaviours associated with the characteristics expected in a particular position. The following list includes categories of these factors identified in the demand analysis:

- Knowledge – information gained during education (e.g. knowledge about heat flow in a building, knowledge of trade law)
- Skills – learned activities in a certain area (e.g. MS Office, communication)
- Abilities – an innate predisposition in a particular area (e.g. analytical abilities)

[3] Prepared on the basis of the Balances of competences from 2012, 2013 and 2014. We refer readers interested in detailed assumptions to the publications from the previous years. The research methodology and the use of tools are described in more detail in Annex 2.

- Others – characteristics which cannot be attributed to the above categories (e.g. mobility, integrity, etc.)

In the remaining part of the report, the word “competences” will be used to refer collectively to behavioural manifestations of expectations expressed in the above categories, which is consistent with the Polish research tradition and the generally accepted international convention.

Competences, which are one of the fundamental concepts in business institutions, have their university equivalent in the effects of education. As Kraśniewski writes,[4] the essence of the effects of education “amounts to the establishment... what the learner should know, understand and be able to do after completion of a certain period (process) of education.” In Poland, the effects of education are usually divided into three categories: **knowledge, skills and social competence**, although these categories are not always separable. As part of the performed work, we made a simplifying translation of the expected competences into the language of effects of education. Similarly to the previous research, we decided to apply a fairly general catalogue of effects, so that they could be easily provided with details and adapted to the specificity of individual subjects.

[4] See also: A. Kraśniewski (2011). Jak przygotować programy kształcenia zgodnie z wymaganiami Krajowych Ram Kwalifikacji dla Szkolnictwa Wyższego. Warszawa: MNiSW; E. Chmielecka (2010). Autonomia programowa uczelni. Ramy kwalifikacji dla szkolnictwa wyższego. Warszawa: MNiSW; Regulation of the Minister of Science and Higher Education of 2 November 2011 on the National Qualifications Framework for Higher Education

BACKGROUND INFORMATION ABOUT THE ANALYSED INDUSTRY[5]

DEFINITION OF THE INDUSTRY

The tourism industry includes a very wide range of business activities, which in its diversity goes beyond the scope of the project "Balance of competences of Cracow research centre." For this reason, it was necessary to narrow definitions and research which, in the case of this report, focused on activities related to the **organisation of tourism, provision of tourist information and conducting business activities related to the hotel industry and accommodation**.[6] Using a limited definition of the tourism industry has some negative consequences (e.g. no analysis of the gastronomic sector), but on the other hand, it allows a more precise and coherent analysis of demand for skills of selected segments of the industry. It is also worth noting the fact that as part of the in-depth expert interviews, the respondents often shared their knowledge and thoughts on the tourism industry in a broader sense, as the economic activities in general, related to tourism activity of people coming to Cracow.[7] For this reason, in the introduction to the report, we will endeavour, where possible, to also refer to such perception of it.

SPECIFICITY OF THE INDUSTRY IN CRACOW

Cracow is one of the most important tourist centres in the country[8] and at the same time one of the most recognisable Polish cities. The resource of tourist attractions of Cracow is huge, and encompasses both rich cultural and historical heritage of the city and the natural environment in its immediate vicinity. For this reason, Cracow is the city most willingly visited for tourist purposes in Poland. For the same reasons the city is popular and attractive to business.[9] Popularity of the city translates into concrete figures: in 2014, the estimated number of visitors to Cracow amounted to almost 10 million, of which approximately 73% were domestic visitors and 27% foreign guests. It is estimated that during their stay in Cracow, they spent PLN 4 billion 500 million (excluding the cost of travel and accommodation paid in advance).[10] Tourism is not only a very important source of income. Its significance for Cracow is at the same time a strong stimulus for development of the whole city, and the positive changes made under the influence of tourists contribute to the improvement in the quality of life of the inhabitants.

One of the most important determinants of the specificity of Cracow's tourism industry is, as mentioned above, a huge number of monuments of absolutely unique historical and cultural importance as well as numerous museums, theatres and art galleries. Thus, historical and cultural tourism is naturally one of the major aspects of the industry, and the most visited districts are the Old Town and Kazimierz. In this context, an important role is also played by Wieliczka and the Memorial Site and Museum Auschwitz-Birkenau situated outside the administrative borders of Cracow.

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[5] This chapter is based on desk research of documents and industry publications and information obtained through interviews from experts, representatives of companies and higher education institutions.
[6] The following codes of the Polish Classification of Activity (PCA) correspond to these areas of activity: 55.10.Z – hotels and similar accommodation; 55.90.Z – other accommodation; 79.12.Z – tourist companies activity; 79.90.B – tourist information.
[7] "Tourism economy in Cracow. Report on the state as of 2011-2014," prepared by the Statistical Office in Cracow, commissioned by the Cracow City Hall.
[8] Report "Marketing strategy of Poland in the tourism sector for 2012-2020," prepared by the Council of the Polish Tourist Organisation in 2011.
[9] "Reports on major Polish cities – Cracow," prepared by Pricewaterhouse Coopers in 2011.
[10] Report "Tourism flows in Cracow in 2014. Monograph," prepared by the Małopolska Tourist Organisation in 2014.

Another important element determining the specificity of the industry in Cracow is the growing influence of the so-called pilgrimage tourism, associated with visits to places of worship and participation in religious ceremonies. What attracts tourists to Cracow is the Sanctuary of the Divine Mercy in Łagiewniki, which is an important place of worship, and a number of places related directly to the figure of John Paul II. Additionally, pilgrims visiting Cracow often go to places situated in the immediate vicinity of the city, such as Wadowice or Kalwaria Zebrzydowska. An important event in this context will be the World Youth Day in 2016, which according to estimates may be associated with the arrival of around 2.8 million pilgrims to Cracow and its area.

The so-called meetings industry,[11] i.e. tourism related to conferences, trade fairs, training, etc., organised in the city has been growing in importance, strongly emphasised by the industry experts. In this respect, Cracow has become a very attractive place. On the one hand, facilities such as Tauron Arena Kraków, ICE Kraków Congress Centre and Expo Cracow opened in recent years provide for the necessary infrastructure to organise large projects of this type. On the other hand, Cracow, among others due to its positive image and huge potential for leisure activities, is a popular choice for various projects which make up the meetings industry. An important event in the context of development of the meetings industry was the conference of MPI – European Meetings and Events Conference organised in Cracow in 2015.[12]

Cracow is also a popular place for people wishing to entertainment and have active leisure. In this respect, the centre of the city is one of the most popular places in Poland. Restaurants, cafés, pubs and clubs offer a wide range of possibilities. There are numerous concerts, festivals and other events constituting an additional attraction for the residents and visitors. In this context, sometimes we have to deal with the phenomena of a troublesome nature – an example of such a phenomenon may be the popularity of organising stag parties by foreign tourists in Cracow. Industry experts indicate in this context the need for strategic actions aimed at creating the image of the city providing high-quality services, and avoiding being perceived only as a "cheap" city. However, in most cases tourism associated with leisure and entertainment in Cracow has a distinctly positive image. Green areas, such as Las Wolski, Planty, Botanical Garden, create the opportunity for a more active leisure. Mass events, such as festivals and sporting events, additionally encourage people to visit the city. However, there are voices among the experts that even more can be done in this area to attract more mass events to Cracow. Cracow is perceived as the place where you can spend time in a pleasant atmosphere. Experts have repeatedly emphasised that Cracow is a city with a soul, which attracts tourists with a unique atmosphere, allowing visitors to experience unusual feelings.

It is also important to emphasise the fact that the significance of the tourism industry is appreciated by the Cracow City Hall. Tourism as one of the key economic industries in Cracow waited until its own research on the opportunities of development of the industry in the city entitled "The Tourism Development Strategy in Cracow for 2014-2020." For many years, the city has pursued the policy of cooperation with the representatives of the industry in order to develop solutions aimed at strengthening the position of Cracow as the leading tourism brand in

[11] See K. Borodako, J. Berbeka, A. Niemczyk and R. Seweryn (2014). Wpływ ekonomiczny przemysłu spotkań na gospodarkę Krakowa. Cracow: Foundation of the Cracow University of Economics, and K. Borodako, J. Berbeka, A. Niemczyk and R. Seweryn (2014). Branża spotkań w Krakowie. Cracow: Foundation of the Cracow University of Economics.
[12] See: http://krakow.pl/informacje/84441,48,komunikat,mpi_emec_2015_w_ice_krakow_.html

Poland.[13] In addition, the city authorities order regular analyses related to the condition of the industry in the city, which include a number of very accurate information about the economic activity of enterprises, characteristics of people visiting Cracow and forecasts of development of the industry in Cracow. These activities stem from the awareness of the potential associated with development opportunities which lie in promoting the city as a tourist destination. Experts emphasise quite unanimously that in terms of cooperation with business Cracow is one of the best examples in Poland, and the expressed reservations are related to the areas which are a problem for most public institutions, e.g. excessive bureaucracy or too long time of translating developed solutions into concrete actions. Experts also point to the very high value of the city's cooperation with the Małopolska province.

COOPERATION OF BUSINESS AND SCIENCE

In the case of tourism, cooperation between science and business is largely confined to the didactic function. Cracow, as one of the strongest academic centres in Poland, facilitates the tourism industry access to qualified personnel. Importantly, during interviews it was pointed out that not only graduates of subjects strictly related to tourism find employment in the industry. Also people with a different professional education, but with high qualifications in foreign languages and social competence are potentially desirable by representatives of the tourism industry. Of course there is a shortage of certain competences, which will be discussed later in the report, but it can be certainly said that the availability of students and graduates of higher education institutions can be considered in terms of opportunities of the industry for further development.

Companies from the industry and representatives of science rarely work together in conducting joint research projects. The main barrier to such cooperation, which was mentioned during interviews, is the lack of adequate funding, but also the perceived lack of common topics that should be addressed. For this reason, the existing cooperation is usually limited to simple projects, such as marking out the routes of trips, or marketing projects, related to promotion or PR. Representatives of companies seem to treat universities primarily as a place of preparation of appropriate potential employees. In contrast, Małopolska Tourist Organisation conducts, with the participation of several universities, research on tourism flows commissioned by the Cracow City Hall.

DEVELOPMENT PROSPECTS OF THE INDUSTRY IN CRACOW

Modern tourism is based on cities. They are the most important places on the tourist map of the world. Cities concentrate cultural and human resources, they are very attractive place for learning about history, culture and communities inhabiting them. In this context, there is every reason to look at the development of the tourism industry in Cracow very optimistically.[14]

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[13] An example of such activities is the cyclic conference organised by the Cracow City Hall "Tourism Forum," providing a platform for meeting and discussion of the representatives of the tourism industry in Cracow with the city authorities, and the activities of the Cracow Convention Bureau (http://www.krakow.pl/ccb/).

[14] Report "Tourism Development Strategy in Cracow for 2014-2020," prepared in 2014, commissioned by the Cracow City Hall.

Large accumulation of monuments and cultural objects, areas attractive in terms of nature, places of worship important for a multitude of people around the world and developing infrastructure conditioning the functioning of the meetings industry – all these advantages of Cracow will stimulate development of the industry all the time. An important direction of development, indicated by the interlocutors during interviews, will be the increase in the number of offers combining urban tourism in Cracow and attractions located nearby the city. In such a model Cracow serves as a tourist centre from which people make short trips to touristically attractive places located in the immediate vicinity. Importantly, also other tourism products, raising the attractiveness of the city, are developed. This is the case, above all, of the so-called meetings industry and religious tourism. Preparation of an adequate infrastructure in terms of both of these branches of tourism gives great hope for the inflow of new tourists to Cracow.[15] At this point, mention should be made primarily of the new congress centres in Cracow, such as Tauron Arena Kraków, ICE Kraków Congress Centre and Expo Kraków, and the expansion of the Sanctuary of Divine Mercy in Łagiewniki. The World Youth Day will also be an important event in the field of religious tourism. This will be an opportunity to promote the tourism brand of Cracow among almost 2.8 million young people who, according to estimates, will visit Cracow in 2016.

Urban tourism is significantly associated with infrastructure. Tourists must be able to easily get into the city as well as move easily and freely around it. In this respect, in recent years Cracow has become a more friendly city. Expansion of the Balice airport and opening of the railway connection to the city centre easily accessible to the arriving people made travelling much easier. Cracow certainly should strive to further develop the grid of air connections. Development of urban transport improves movement in the city. The process of modernisation and improvement of transport in Małopolska will also be present in the future. A large part of the funds coming from the European Union for 2015-2020 is to be spent on the improvement of public transport, mainly in the field of railway transport (e.g. opening of high-speed railway in Cracow), and construction of a network of park-and-ride car parks on the outskirts of cities.[16]

An additional impulse for development of the tourism industry can also be a comprehensive programme of urban regeneration, planned using the above-mentioned European funds. Their efficient use would make it possible to increase the tourism potential of locations in Cracow which, so far, have been less chosen tourist directions (such as the historic centre of Nowa Huta, Podgórze and Grzegórzki). Infrastructure investments also bring about investments in hotels. During the interviews, the increase in the number of constructed hotels and positive prospects for development of this branch of the tourism industry were often indicated. In this context, as indicated by the experts, development of human capital, inter alia, in the area of skills related to hotel facilities management, is necessary.

A frequent topic raised in the expert interviews were the issues related to the possibilities of hiring the right employees. The tourism industry consists of many diverse types of business activities. Some of them do not require high qualifications, however, to perform certain functions one requires very high specialist and soft competences. Knowledge of foreign languages is also crucial, according to the interviewed experts. Therefore, a threat to the further development of the industry is the growing competition on the labour market of companies operating in the field

[15] http://www.aktualnosciturystyczne.pl/produkt-turystyczny/krakowski-mnoznik-1
[16] See “Budowlani. Biuletyn małopolskiej okręgowej izby inżynierów budownictwa,” No. 2/2014

of BPO/SSC[17] and ITO.[18] Potential employees, who could perform important professional roles in the industry, often choose to work in companies involved in business process outsourcing.

A very important chance for further development of the industry in Cracow is a trend to use modern communication technologies in tourism. Currently, an increase in the role of mobile technologies, information available electronically, systems of sale and independent organisation of travel over the Internet is observed. This trend is also related to the change in the way of using free time. There is a trend to give up longer recreation – trips are becoming shorter and shorter, however, they are organised more frequently and independently.[19] These trends provide an opportunity for development of the tourism industry in Cracow on the basis of the creation of new IT solutions prepared by companies operating in the city. Moreover, it is worth indicating the possibility of using modern technologies in promoting the city and using them to increase its attractiveness. A factor supporting this kind of cooperation is the existence of companies functioning very dynamically in Cracow, involved in innovative IT solutions, focused on the so-called start-up stage.[20]

To sum up, the prospects for development of the tourism industry in Cracow are very positive. What is the most important here is the brand of Cracow as a city of a unique cultural and historical offer and the continuous development of other tourism products of Cracow, which include the meetings industry and the pilgrimage tourism.

PESTEL AND SWOT ANALYSES

PESTEL, that is analysis of the external environment (Political, Economic, Social, Technological, Environmental, Legal environment)

a) Political environment

The tourism industry in Cracow is linked with the overall condition of the region. A stable political situation is very important to tourism. All events threatening political stability of Poland, the region or the European Union pose a certain threat.

b) Economic environment

Even though the tourism industry as such is relatively highly sensitive to the economic situation, it seems that during the recent economic crisis it did not suffer greatly. A strong brand of Cracow gives a chance to the continuous development of the industry. Continuous expansion and diversification of the city's offer, an example of which may be developed congress or pilgrimage tourism, seems particularly desirable.

c) Social environment

The presence of tourists in the city is an important factor influencing the character and quality of life of the residents. On the one hand, the positive impact of contacts between tourists arriving

[17] Outsourcing companies dealing with business processes.
[18] Outsourcing companies dealing with IT processes, IT services and software development.
[19] Report "Tourism Development Strategy in Cracow for 2014-2020," prepared in 2014, commissioned by the Cracow City Hall.
[20] "Balance of competences of the IT industry," Cracow, 2014.

from around the world and people living in Cracow should be noted. On the other hand, however, there is some danger associated with a potential increase in the views and attitudes of the nationalist and anti-immigrant nature (both locally and on a national scale). If such a phenomenon existed, it could have a negative impact on the perception of Cracow.

d) Technological environment

Development of information technologies and universal access to the Internet affects the changes in behaviour of tourists and the industry itself. The IT industry existing and rapidly growing in Cracow may also support tourism in preparation of new solutions.

e) Environmental setting

Natural environment in Cracow influences dynamic development of the industry. The attractiveness of areas located in the immediate vicinity of the city is its additional advantage. A threat to the industry (though not only) is the problem of air pollution in the city raised more and more strongly.[21] It is certainly necessary to implement remedial actions in this area.

f) Legal environment

The introduction of restrictions on the freedom of movement of people between European countries would cause a threat to the development of the industry in Cracow. The currently existing solutions stimulate tourism in a positive way.

SWOT analysis, i.e. a summary of strengths and weaknesses of the sector and opportunities and threats connected with the environment of the sector.

Strengths of the tourism industry in the region:

- rich historical and cultural heritage, including many monument of global importance;
- favourable location – small distance between the city and other areas attractive for tourists;
- good connections of the city – easy access to the city by car or plane, development of rail transport;
- large number of people visiting Cracow;
- large number of economic entities operating in the industry;
- extensive hotel base (with great diversity of standard);
- development of new forms of tourism, such as congress and pilgrimage tourism;
- noticing the importance of tourism in the city's development by the local authorities and cooperation of the city with the province;
- positive image of the city in the country and abroad (brand of Cracow);
- developed tourist urban infrastructure (restaurants, hotels, etc.) – including large facilities, congress centre, exhibition centre, entertainment and sports hall.

Weaknesses of the tourism industry in the region:

[21] See: http://www.krakowskialarmsmogowy.pl/

- problems associated with urban infrastructure – too few car parks, especially for buses, walking and cycling paths;
- poor use of the tourism potential of the city suburbia;
- too weak promotion and use of green areas located throughout the city;
- staff shortages, especially as it comes to better qualified employees;
- conflicts between tourism and residential function, especially in the city centre and in Kazimierz;
- crime in places most popular among tourists.

Opportunities of the tourism industry in the region:

- growth of international interest in Crakow as a destination for events related to the meetings industry;
- opening up to tourists from Asia and South America;
- the possibility of using modern information and communication technologies in order to improve competitiveness of the city's offer and reach directly a large number of customers;
- increase in cooperation and exchange of experiences between the entities operating in the industry;
- development of air, railway and road connections facilitating visits in Cracow;
- development of pilgrimage and congress tourism.

Threats to the tourism industry in the region:

- competition from other centres of city tourism in Europe and in Poland;
- outflow of qualified personnel working in tourism to other industries or to other cities in Poland and abroad;
- change in tourist behaviours associated with the increased awareness of the threat of terrorist attacks;
- perceiving Cracow primarily as an inexpensive place for leisure/entertainment;
- the occurrence of natural disasters (e.g. floods);
- social conflicts in the city associated with the increase in tourist flows and the dominance of tourism in the urban space in some areas of the city;
- adverse economic events leading to economic crisis;
- low quality of air in the city;
- risks associated with the danger of restrictions on the functioning of the Schengen Agreement.

DEMAND ANALYSIS: INDUSTRY'S DEMAND FOR COMPETENCE

We begin description of the results related to the industry's demand for competences with the presentation of a list of positions for which recruitment in companies is carried out most often. Analogously to the observations made last year, it is important to note different recruitment strategies of companies. On the market, there are both companies which hire graduates directly on independent positions, and those for whom such a situation is completely unrealistic, and recruitment is conducted exclusively to assistant positions, from which promotion is possible only after several years and gaining sufficient experience.

Positions for graduates most often indicated by companies in the travel industry
Receptionist, Front desk clerk, Concierge
Sales Specialist, Sales Representative, Sales department, Key Account Specialist, Travel Sales Agent, Sales Coordinator
Tourism Specialist, Tourism Clerk, Inbound Tourism Specialist, Tourism and Marketing Specialist, Tourism Consultant
Marketing Specialist, PR Specialist, Marketing Department
Customer Service Specialist, Customer Service
Tourist Product Clerk, Tourist Product Specialist, Product Manager
Travel Consultant, Tourism Advisor, Tours Coordinator, Promoter of Tourist services
Guide, Tour Guide, Tourist Guide
Leader, Tour Leader
Animator, Instructor
Reservations Agent, Assistant in reservations department, Reservation Specialist
Incoming Tourism Clerk
Valet
Waiter
Manager, Senior Project Manager, Junior Project Manager
Executive Housekeeper
Transport specialist
Porter
Trainee, Intern, Assistant

Table 1. List of positions for which graduates in the tourism industry are recruited.

Plans for the employment of graduates for 2016 and 2021 look very optimistically, although to some extent this is related to the seasonal nature of employment of students/graduates in selected positions. Comparison of the number of planned recruitment with the current state of employment shows that there will be more and more jobs for graduates. Such high results certainly indicate optimism of Cracow travel companies. The dynamics of employment of graduates looks as follows:

Employment of graduates in 2016	Employment of graduates in 2021
20.6%*	**30.9%***
Increase in dynamics of employment of graduates	

Table 2. Dynamics of employment of graduates in the tourism industry.
* graduates who will be employed in 2016 and 2021 as a percentage of current total employment (taking into account all legal forms)

In the tourism industry, among the companies participating in the research, a more frequent form of employment is employment contract – 54%, compared to 46% of civil law contracts (Fig. 1).

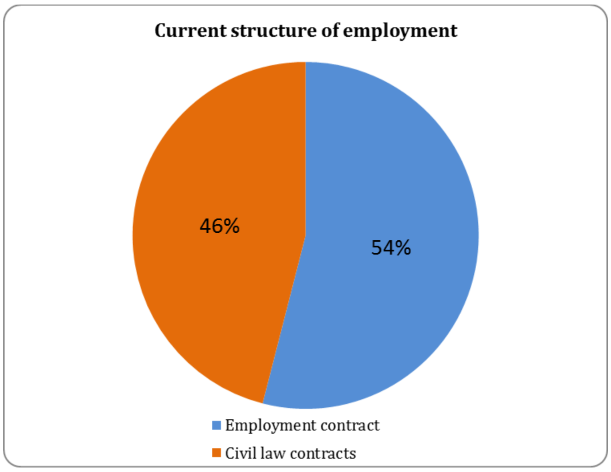

Figure 1. Structure of employment in the tourism industry as regards the type of contract.

COMPETENCES TODAY AND COMPETENCES OF TOMORROW

Like in the previous years, the analysed competences were distinguished on the basis of interviews with opinion leaders, companies and the analysis of job advertisements. They were divided into 4 groups: specialist (professional) knowledge and skills, business skills and knowledge, soft skills, foreign languages and other requirements. **Though the list of competences is extensive, it does not need not be exhaustive** – there surely is a great number of companies on the market which need other, often very specific and unique skills.

As part of preparatory work, an attempt to bring the competences sought to a similar level of generality was made. However, this was not always possible or even desired, hence **individual competences will vary in the level of detail**, which to some extent also reflects the specificity of the industry.

The companies participating in the research answered, inter alia, the questions about the importance of each competence currently and in the future. Naturally, there are quite large differences in the importance of individual competences depending on the profile of activity and specialisation of an entity. **Thus, we adopted the perspective of an entire industry, where the labour market for graduates as a whole becomes the reference point.** It should be taken into account when interpreting the results – the fact that some competence was assessed relatively low does not mean that there are no companies on the market for which this competence is of absolutely crucial importance – however, from the point of view of the overall number of graduates employed in the future its weight is adequately smaller.

It should be also noted that, similarly to the previous reports, presented **data is rather a description of the opinions of people who are responsible for personnel policy or who manage companies operating in the industry, and hence it is not of a normative nature**. In other words, we present the beliefs of people managing companies, abstaining from valuation whether the beliefs are right or not, and whether the operating strategy based on them is good.

From the point of view of the labour market, currently, the most important competences are thought to be, among others: **English, integrity, customer focus, care for quality/conscientiousness** and **organisation of own work.**[22] The structure of competences most important in the future does not differ in a significant way. Five competences most important in the future are: **customer focus, English, initiative/innovativeness, verbal and written communication** and **integrity**. There are two competences which appear as the new ones on the list of "the future:" **focus on development** and **comparing offers/searching out information** (see Table 3).

Table below presents a set of 20 most important competences (requirements) in 2016 and 2021.

20 most important competences (requirements) currently	Importance 2016
English	5.00
Integrity	4.87
Customer focus	4.83
Care for quality/conscientiousness	4.82
Organisation of own work	4.74
Presentation and propriety	4.73
Time flexibility and mobility	4.70
Verbal and written communication	4.68
Sales	4.61
Using MS Office, OpenOffice or Google Docs	4.61
Passion/interest in working in the industry	4.61
Business etiquette	4.57
Cooperation	4.57
initiative/innovativeness	4.52
Establishing relationships	4.52
Marketing, PR and social media	4.48
Coping with stress	4.48
Goal orientation	4.48

20 most important competences (requirements) in the future	Importance 2021
Customer focus	5.00
English	4.95
initiative/innovativeness	4.90
Verbal and written communication	4.90
Integrity	4.86
Care for quality/conscientiousness	4.80
Presentation and propriety	4.75
Time flexibility and mobility	4.71
Passion/interest in working in the industry	4.71
Organisation of own work	4.68
Cooperation	4.62
Using MS Office, OpenOffice or Google Docs	4.60
Sales	4.57
Business etiquette	4.57
Marketing, PR and social media	4.52
Coping with stress	4.52
Establishing relationships	4.52
Focus on development	4.48

[22] Precise definitions of these and other competences are included in the dictionary of competences in Annex 1.

Calculations and settlements	4.41		Comparing offers/searching out information	4.45
Computer programmes	4.30		Computer programmes	4.42

Table 3. Competences today (regarded as important in 2016) and competences of tomorrow (regarded as important in 2021). Competences marked in orange are those which will lose their place among 20 most important competences in 5 years. Green indicates competences which will join the list of 20 most important competences in 5 years.

GROUPS OF COMPETENCES

The following charts present the importance of competences in individual groups (specialist knowledge and skills, business knowledge and skills, soft skills, languages and other requirements) in comparison of the current state and in 5 years.

In the case of specialist knowledge and skills (Fig. 2), the importance of individual competences in the coming years, according to the declarations of employers, will be relatively stable. What draws attention is the increase in the importance of knowledge in areas such as **customer focus, comparing offers/searching out information** and **knowledge about the industry and new trends**.

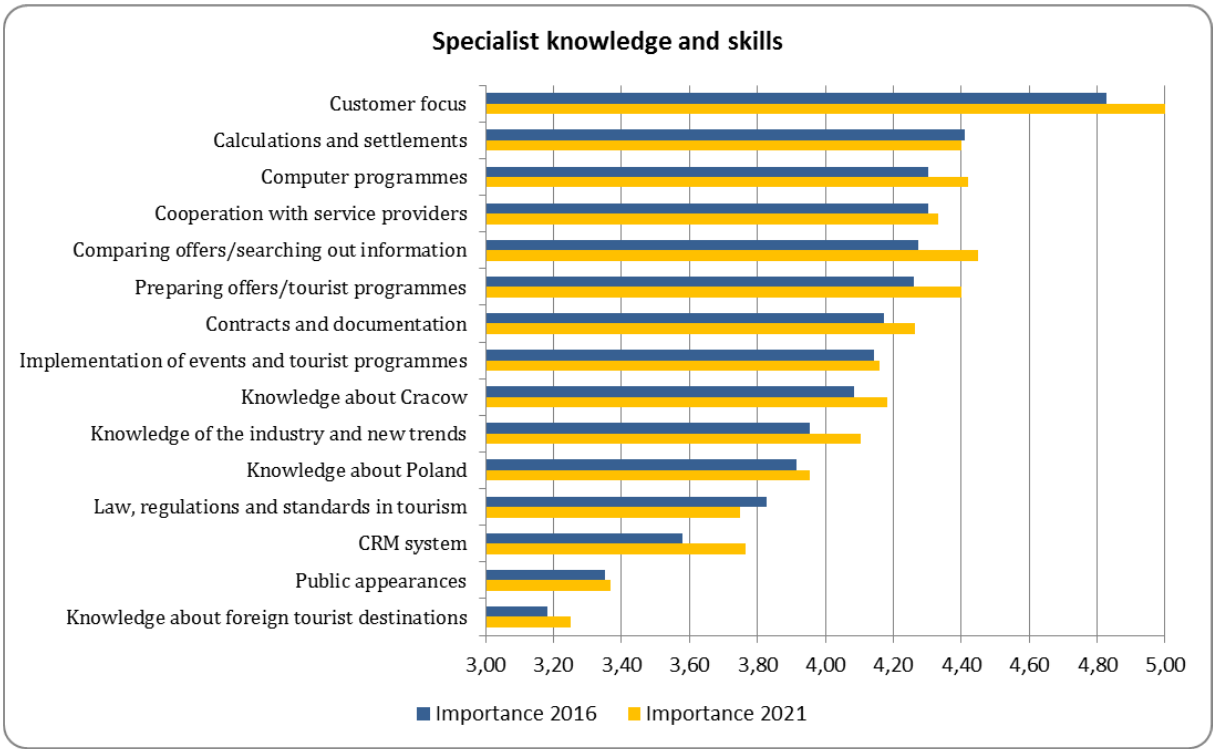

Figure 2. Expected importance of competences in the area of "Specialist knowledge and skills" from the point of view of employers in 2016 and 2021.

In terms of business knowledge and skills (Fig. 3), the following competences are regarded as the most important and will remain so in the subsequent years: **using office packages, sales skills** and **knowledge of business etiquette**. Relatively considerable increase in the importance is predicted for **project and team management** skills.

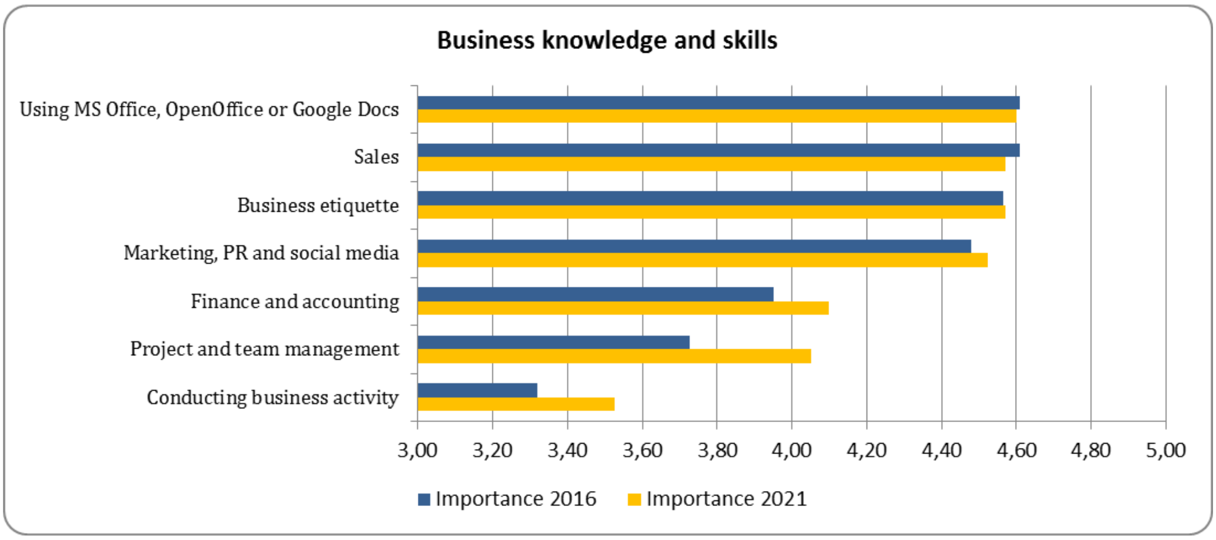

Figure 3. Expected importance of competences in the area of "Business knowledge and skills" from the point of view of employers in 2016 and 2021.

In the category of soft skills, virtually all competences are assessed by employers as important, however, the structure of importance will undergo some changes (Fig. 4). **Initiative/innovativeness** will become the most important competence, while **verbal and written communication** and **focus on development** will gain in importance considerably.

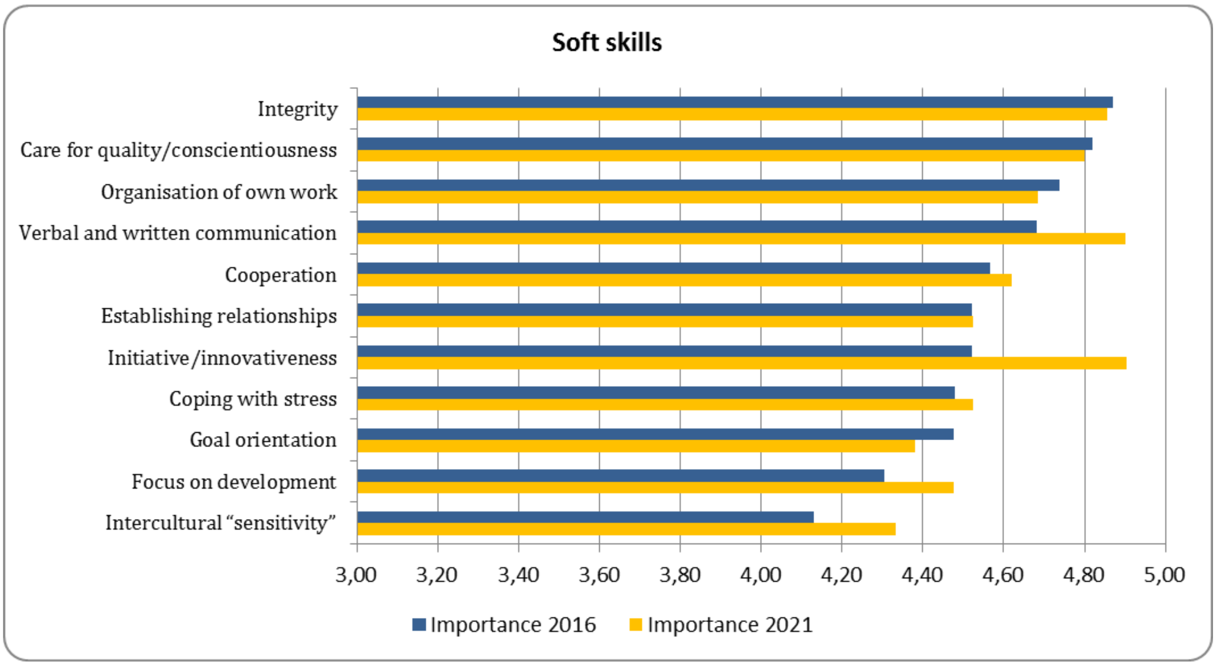

Figure 4. Expected importance of competences in the area of "Soft skills" from the point of view of employers in 2016 and 2021.

The last analysed category are foreign languages and other requirements/expectations. The most important competences are, and will remain, **English, presentation and propriety, time flexibility** and **passion/interest in working in the industry**. In the next five years, other foreign languages (including German, Spanish and Russian) will strongly gain in importance (see Fig. 5).

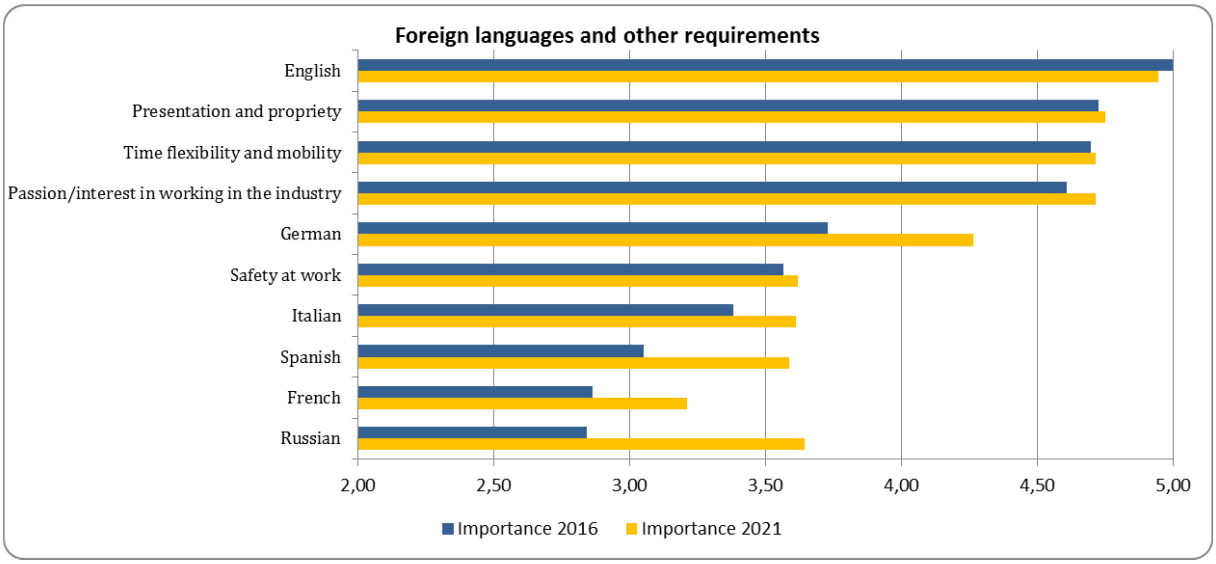

Figure 5. Expected importance of competences in the area of "Foreign languages and other requirements" from the point of view of employers in 2016 and 2021.

We also asked employers to indicate competences which are crucial in the context of promotion. They are listed in the table below.

List of competences/requirements of crucial importance in the context of promotion
Integrity
Time flexibility
Diligence
Commitment
Customer focus
Initiative/innovativeness, proactivity
Building relationships, establishing contacts
Enthusiasm for work
Knowledge
English
Creativeness
Self-reliance
Conscientiousness
Knowledge about the region
Organisation of work
Focus on development
Sociability
Passion
Work performance
Foreign languages
Team work

Table 4. List of competences crucial for graduates to get promotion.

Most of competences indicated by employers relevant for getting promotion are soft skills and a certain attitude. This is important information indicating the role of these characteristics for the career development of graduates.

COMPETENCES CRUCIAL FOR THE INDUSTRY

One of the most important indicators of perception of the education market from the point of view of employers is the comparison of importance of certain expectations with the difficulty of acquiring them. As indicated by data in Table 5, the twenty most important competences include both those which are easy (green colour) and difficult (red colour) to acquire on the labour market. Following this line of thought, from the point of view of supply and demand competences which representatives of the industry consider relevant, but also difficult to acquire, as they are particularly hard felt scarce goods, can be regarded as crucial.

And so, in the case of the tourism industry, it can be concluded that in comparison with other industries analysed in previous years, the situation looks quite optimistically. The majority of the most important competences are at most moderately difficult to acquire. The crucial, scarce competences include: **initiative/innovativeness, sales skills, customer focus** and **organisation of own work**. At the same time, it is worth remembering that **initiative/innovativeness**, which is the hardest to acquire, was regarded by the employers as the most important competence of the future. The following competences are easily available: **English, presentation and propriety** and **using office packages**.

20 most important competences (requirements) currently	Importance	Difficulty of acquiring
English	5.00	2.45
Integrity	4.87	3.00
Customer focus	4.83	3.56
Care for quality/conscientiousness	4.82	3.41
Organisation of own work	4.74	3.53
Presentation and propriety	4.73	2.78
Time flexibility and mobility	4.70	3.16
Verbal and written communication	4.68	3.22
Sales	4.61	3.88
Using MS Office, OpenOffice or Google Docs	4.61	1.89
Passion/interest in working in the industry	4.61	3.32
Business etiquette	4.57	3.44
Cooperation	4.57	3.33
Initiative/innovativeness	4.52	3.95
Establishing relationships	4.52	3.06
Marketing, PR and social media	4.48	3.41
Coping with stress	4.48	3.44
Goal orientation	4.48	3.39
Calculations and settlements	4.41	3.41
Computer programmes	4.30	3.06

Table 5. Twenty most important competences and difficulty of acquiring them. Green was used to indicate competences which are most easily available on the labour market, and red to indicate the ones which are the hardest to acquire.

Below we present charts reflecting the importance and the difficulty of acquiring individual competences in four groups mentioned earlier (specialist knowledge and skills, business knowledge and skills, soft skills, languages and other requirements).

In the area of specialist knowledge and skills, there is quite considerable diversity in terms of difficulty of acquiring competences on the labour market (Fig. 6). Among the most important competences, the following can be acquired relatively easy: **knowledge about Cracow, knowledge about Poland** and **knowledge of computer programmes**. It is harder, though still relatively easier than in other analysed industries, to acquire competences related to: **knowledge of law and regulations, implementation of tourist events** and **preparing offers/tourist programmes**.

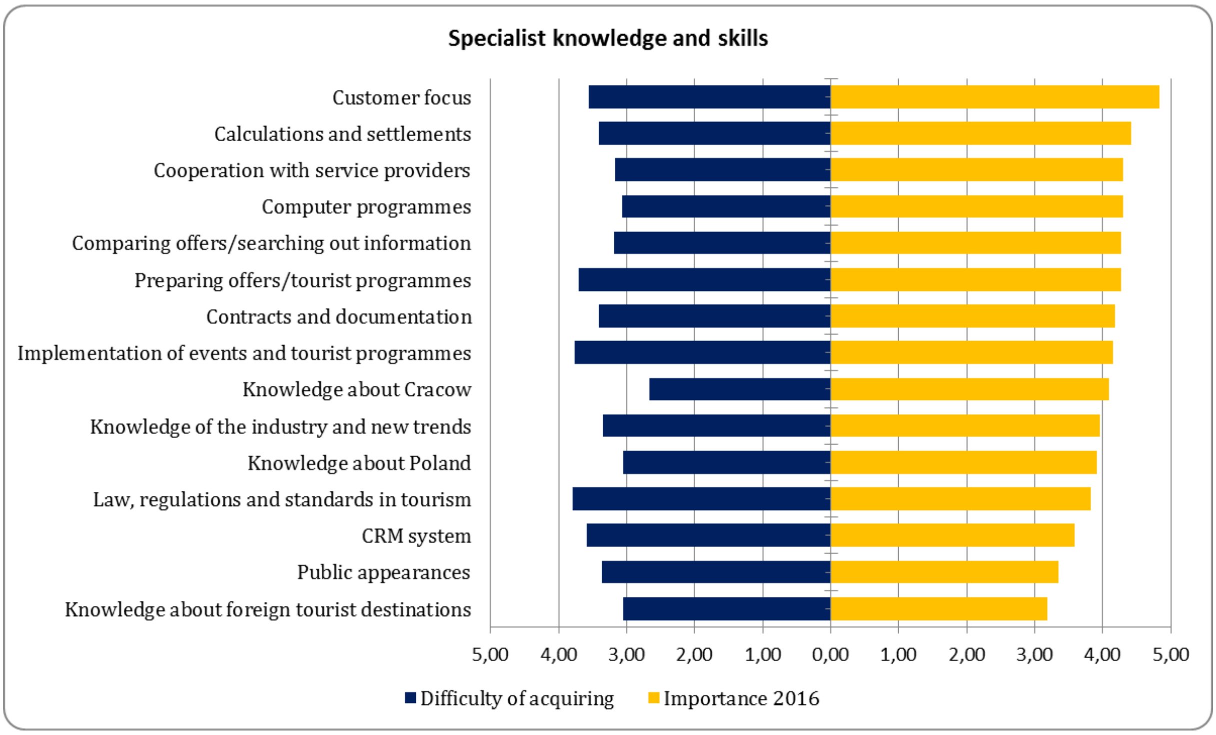

Figure 6. Importance and difficulty of acquiring competences in the area of "Specialist knowledge and skills" from the point of view of employers.

In the area of business knowledge and skills (Fig. 7), the fact that the competence related to **sales skills**, assessed the highest in terms of importance, is also one of the competences most difficult to acquire in this group, draws attention. **Knowledge in the field of accounting and finance** is also difficult to acquire. **The use of office packages** is easy to acquire and very important from the point of view of employers.

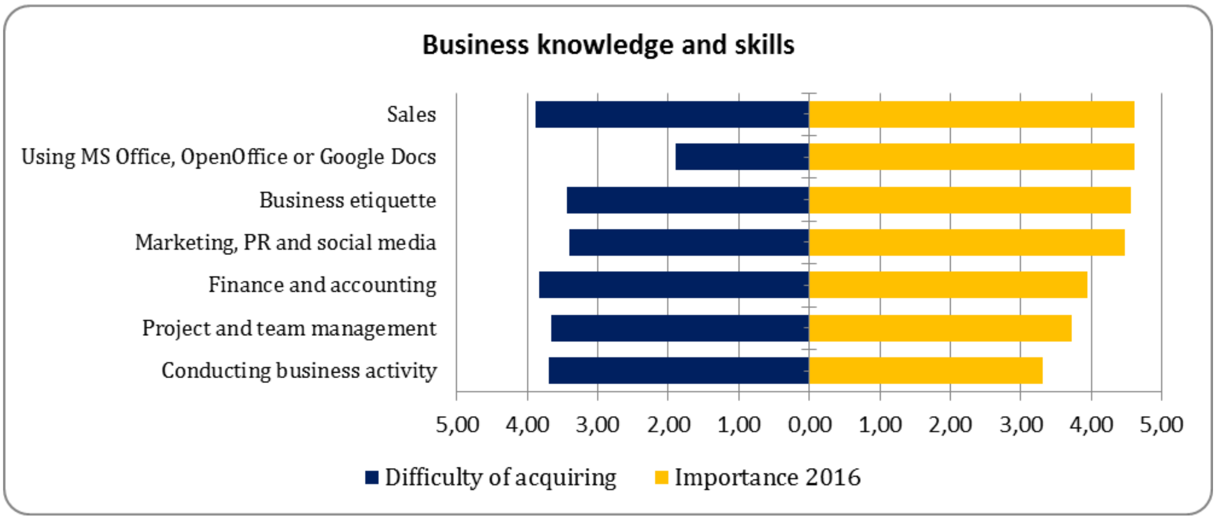

Figure 7. Importance and difficulty of acquiring competences in the area of "Business knowledge and skills" from the point of view of employers.

In the area of soft skills (Fig. 8), a very important competence, which is difficult to acquire, is **initiative/innovativeness**, while competences which are acquired more easily include **integrity, ability to establish relationships** and **focus on development**.

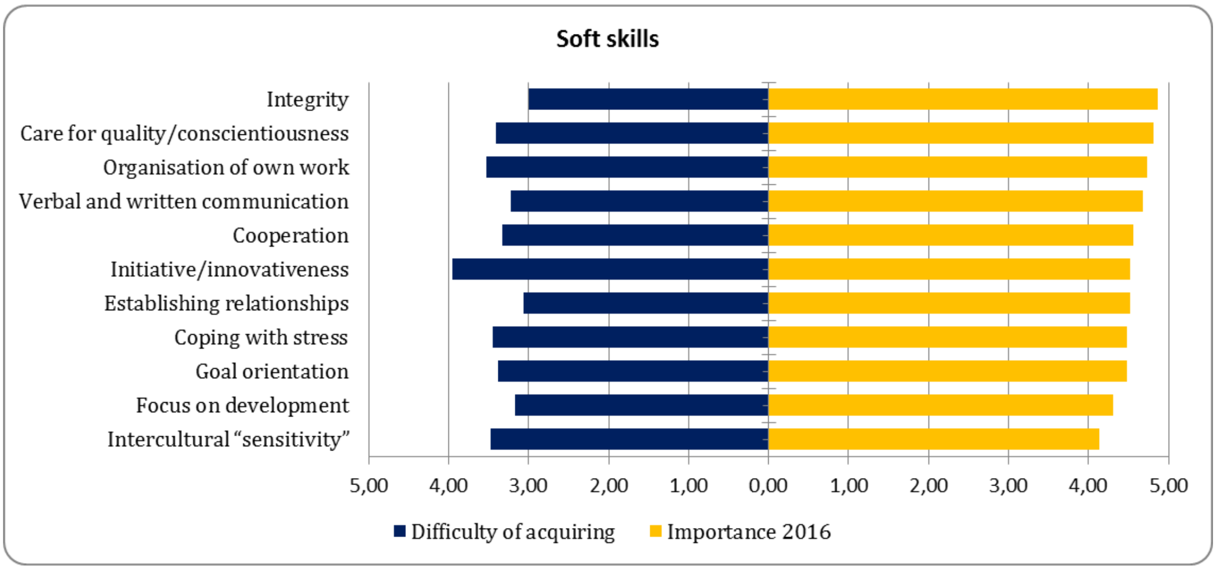

Figure 8. Importance and difficulty of acquiring competences in the area of "Soft skills" from the point of view of employers.

When it comes to foreign languages and other requirements, similarly to several other analysed industries, knowledge of **English** by graduates (very important and easy to acquire) is growing as the advantage of the Cracow's labour market. **Presentation and propriety** as well as knowledge of **safety regulations** are also easy to acquire. It is difficult to acquire other foreign languages: **German, Spanish, Italian, French and Russian** (Fig. 9).

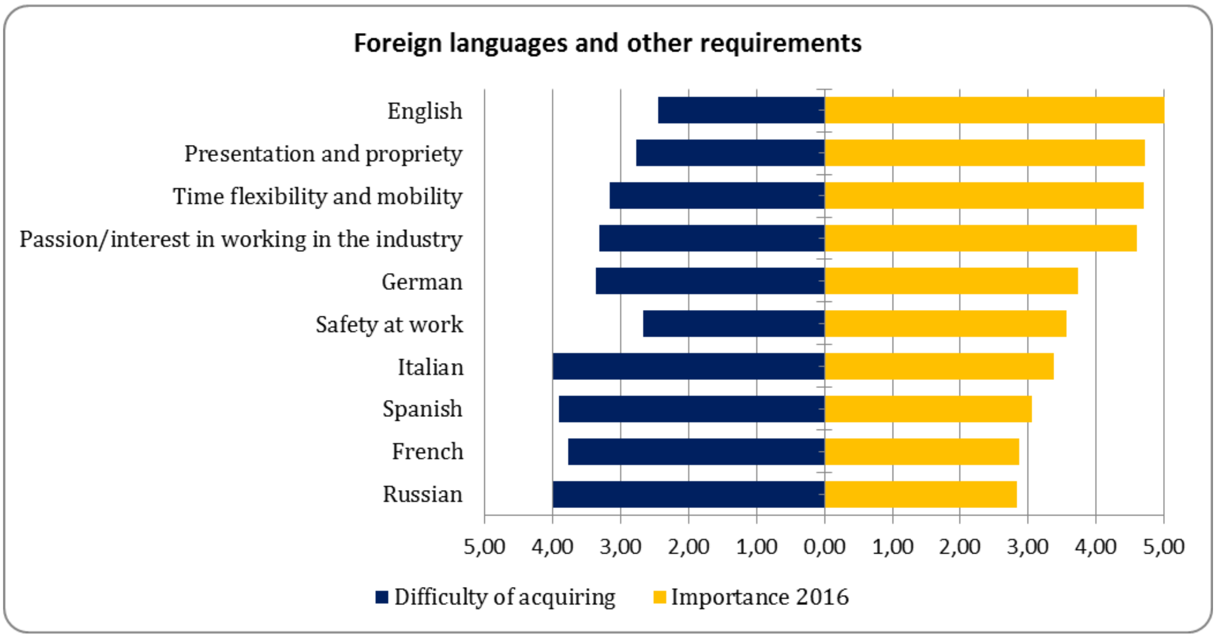

Figure 9. Importance and difficulty of acquiring competences in the area of "Languages and other requirements" from the point of view of employers.

ANALYSIS OF SUPPLY: EFFECTS OF EDUCATION RELEVANT FOR THE INDUSTRY

As already mentioned in the reports from research carried out in previous years, the analysis of the effects of education achieved in higher education institutions has a complex nature. By definition, the effects of education are related to an "average student," which means in practice that among the graduates leaving the university walls there are both those prepared much better and much worse than the average result suggests. Additionally, in the case of the tourist industry, on the side of supply of competences the research included only strictly "industrial" subjects of study, and as we know from the answers of companies, very often they recruit also graduates of philological subjects. On the other hand, graduates of subjects related to tourism find employment in other industries as well. Therefore, interpretation of the results requires some caution.

At the general level, the answers of companies and universities related to the quality of education seem to be quite consistent. General assessment of the educational offer of Cracow is quite high, though the problem noted by the representatives of business, and which the representatives of universities are also aware of, is the insufficient development of the internship programme which would enable students to gain relevant experience. Representatives of both communities also draw attention to the negative phenomena associated with the approach of the students to the learning process – often studies in the field of tourism are treated as the second choice, assumed to be "easy," which has a negative influence on the commitment and motivation of students, and as a result they do not make sufficient use of the available potential. The offer of postgraduate studies is highly assessed.

Currently, there is a slight oversupply of graduates in tourism subjects on the market, but due to high competition from other industries acquisition of real talents seems to be a very difficult task. Representatives of companies unanimously admit that the employed graduates often require considerable training investment. In this context, attitude of candidates to work, their desire to develop, their soft skills and a genuine desire to work in the industry are of importance.

According to the representatives of universities, decline in the number of graduates is to be expected in the coming years, while it is planned to slightly increase the number of graduates in full-time studies, and largely reduce the number of graduates in part-time studies.

The following table shows the names of subjects of study which were indicated by the representatives of companies as best matching their expectations.

Subjects/specialisations/profiles[23] of study indicated the most frequently by companies in the industry as matching their expectations
Philologies, Italian Philology, Romance Philology, English Philology, Philologies (Jagiellonian University)
Tourism and recreation
Management in Tourism (Jagiellonian University), Management in Tourism (University of Economics)
Marketing and Management, Management, Management and Marketing (University of Economics), Marketing
Tourism

[23] The original names indicated by entrepreneurs were kept; various categories are not always separable.

Hotel industry and gastronomy
Tourism (University of Physical Education)
Accounting (University of Economics), Accounting
Foreign Trade (University of Economics)
Tourism Management (University of Physical Education)
International relations
Geography (Jagiellonian University)
International tourism

Table 6. List of subjects, specialisations and profiles of study indicated by employers as educating for the needs of the industry.

The achievement of individual effects of education in each of the four groups of competences will be presented on several charts below. These will not be the average answers as in the case of demand for competences, but the percentage of surveyed subjects in which a given effect of education is achieved at the level at least average and at least good. It is connected with the internal diversity of the industry and the percentage results give a better view on the situation than the application of average or weighted average. This is related to the fact that except for post-graduate studies and a very limited number of specialised subjects very rarely the curriculum takes into account education of the majority of competences important to the industry. On the other hand, curricula include effects of education which have no greater significance for the industry (hence representatives of business often unfairly claim that graduates have a lot of little useful knowledge – this knowledge may be applicable in other industries). Companies search for employees for various positions; similarly, universities educate graduates with different profiles in individual fields and specialisations. One should bear this in mid while interpreting the results.

With regard to the effects of education in the group of specialist knowledge and skills, all of them are educated at the average level on at least half of the analysed subjects. At the level at least good, the assessment of the representatives of universities is more balanced. Competences educated the most often include **law and regulations, preparing offers/tourist programmes, knowledge of the industry and new trends** and **knowledge about Poland** (nearly 90% of subjects). On the other hand, the least frequent achieved effects of education include: **CRM systems** (over 30%), **computer programmes**, **calculations and settlements** and **cooperation with service providers** (over 40%) (Fig. 10).

In terms of business knowledge and skills (Fig. 11), all of the analysed competences are educated on all or almost all subjects at the level at least average. Competences often educated at the higher level include **marketing, PR and social media** (nearly 80%) and **the use of office packages** (nearly 70%). The effects of education achieved the least often are related to **sales skills** and **business etiquette** (little over 30%).

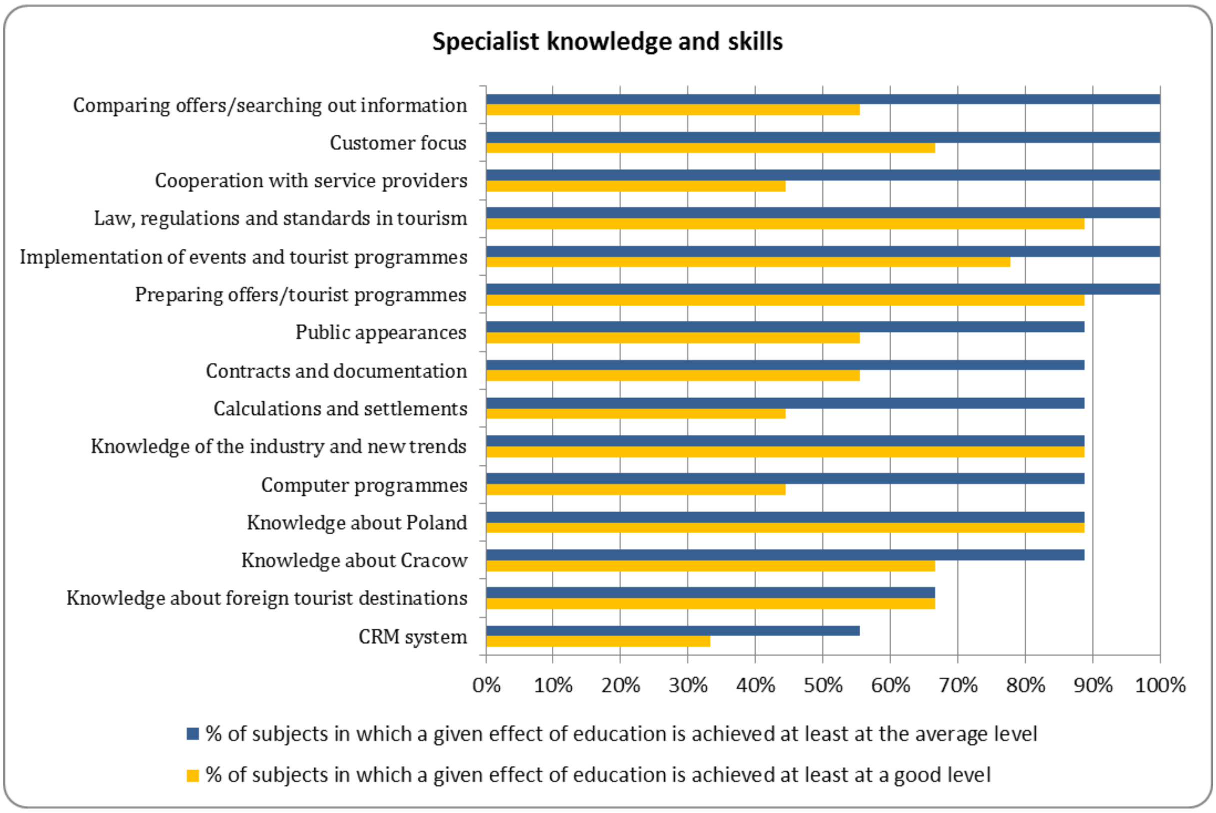

Figure 10. Percentage of subjects and specialisations in which the effects of education in the field of "Specialist knowledge and skills" are achieved at least at the average and good level (point of view of universities).

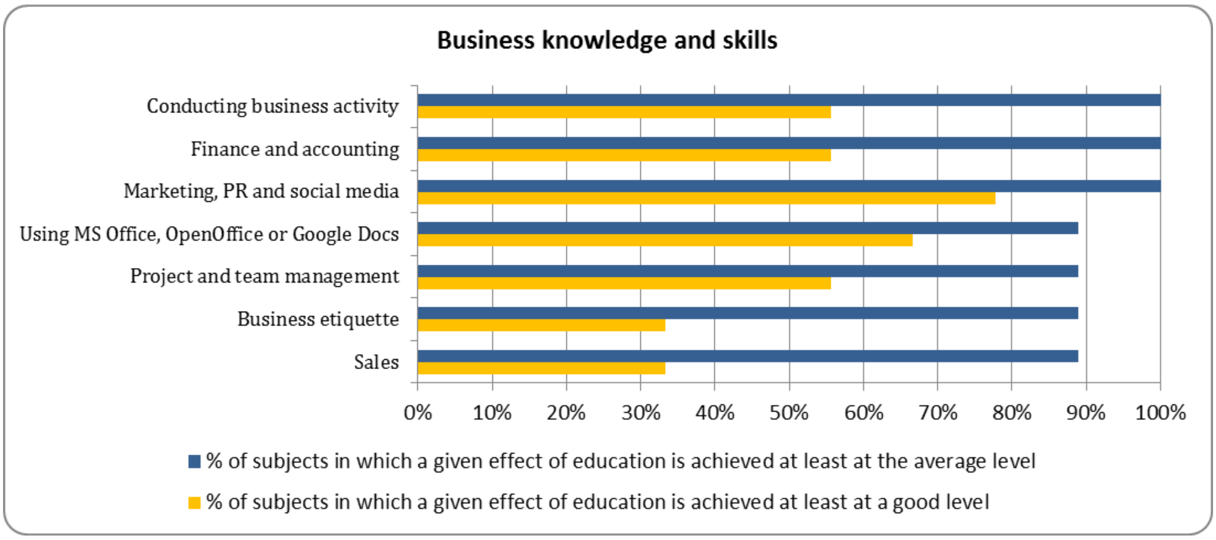

Figure 11. Percentage of subjects and specialisations in which the effects of education in the field of "Business knowledge and skills" are achieved at least at the average and good level (point of view of universities).

All competences in the area of soft skills are educated at the average level in almost all subjects (Fig. 12). The effects of education achieved the most frequently at the level at least good are related to **integrity** (100%), **cooperation** and **establishing relationships** (nearly 90%). By far the least frequently achieved effects of education are associated with **initiative/innovativeness** (little over 50%).

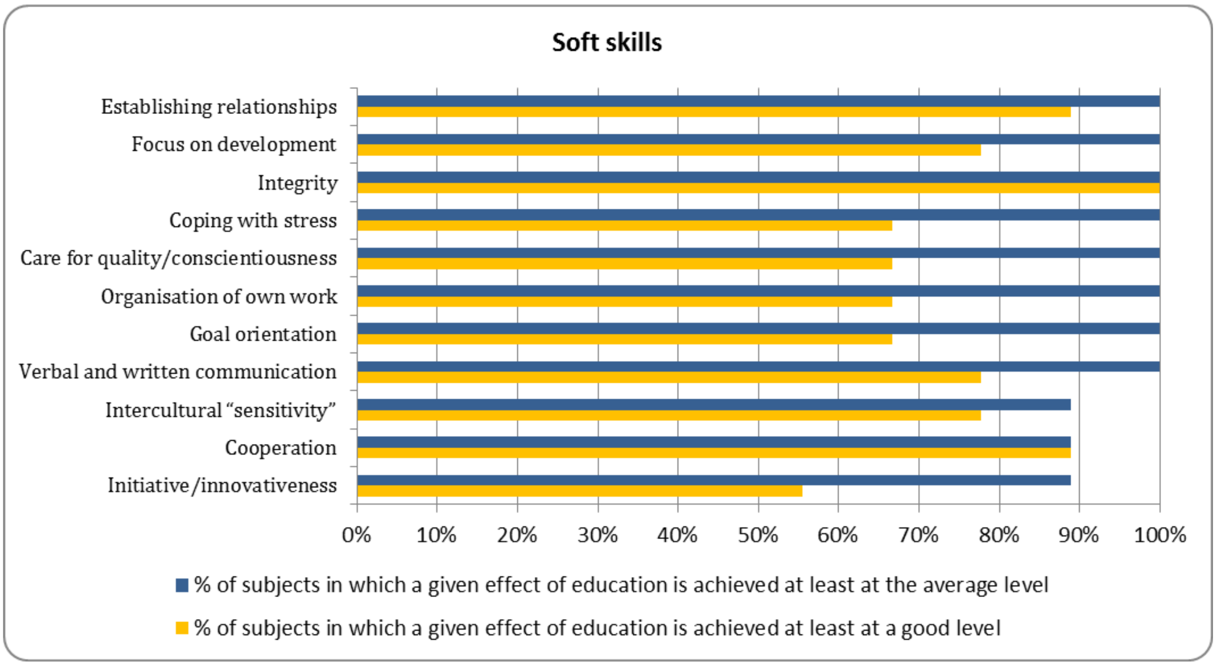

Figure 12. Percentage of subjects and specialisations in which the effects of education in the field of "Soft skills" are achieved at least at the average and good level (point of view of universities).

As for other requirements (Fig. 13) – in almost all of the analysed subjects students develop **passion/interest in working in the industry** at the level at least good, and a little less often knowledge of safety rules and presentation and propriety.

When it comes to teaching language skills, their quality is the direct responsibility of language colleges. Typically, the obligatory foreign language course in the analysed subjects of first and second degree studies is English, and students may attend free of charge one extra language classes in any other modern language. Due to the status of teaching foreign languages at universities, in practice, in this case students are the ones who may have a deciding vote by singing up or not for selected classes and developing language skills of their choice at least at a basic level (learning a new language from scratch at a higher level is much more difficult due to the limited number of hours).

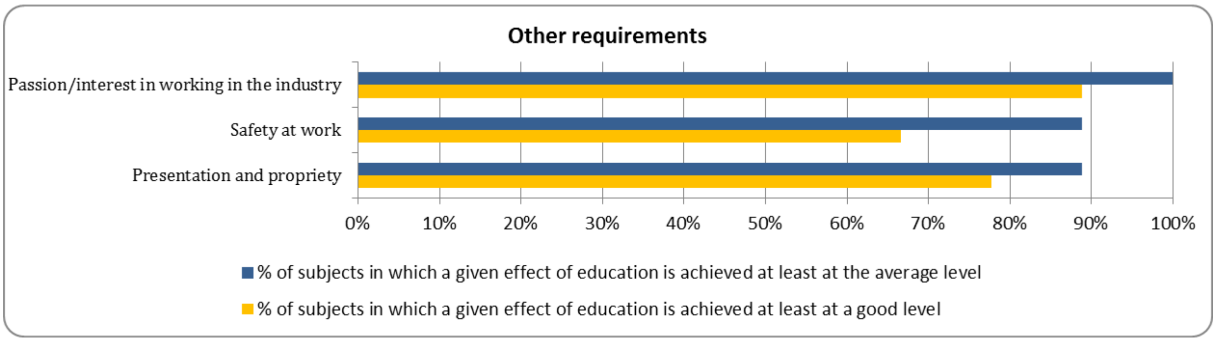

Figure 13. Percentage of subjects and specialisations in which the effects of education in the field of "Other requirements" are achieved at least at the average and good level (point of view of universities).

Representatives of universities were also asked to indicate additional effects of education which may be important for employers and which are not included in the catalogue of analysed competences. We present them in table below.

Additional effects of education achieved in subjects related to the industry
Application of knowledge about the Earth in tourism
Developing tourist routes
Conducting debates, negotiations
Knowledge of and compliance with the principles of protection of industrial property and copyright
Conducting a comprehensive audit of selected areas of an enterprise or entire organisation
Designing changes in the organisation and managing them
Acquiring and improving knowledge and professional skills individually, in a team and organisationally
Making independent and responsible decisions in crisis situations on a micro and macro scale
The ability to organise attractive forms of leisure activities
Knowledge of health effects of leisure activities chosen by tourists
Skills associated with new methods of biological and mental regeneration offered to tourists
Knowledge of adventure education as a new approach to the recreation of children and teenagers

Table 7. List of additional effects of education

BALANCE OF COMPETENCES: TRANSFER OF COMPETENCES FROM UNIVERSITIES TO BUSINESS

Our analysis of demand indicated competences crucial from the point of view of the industry, trends of their importance in the future and difficulties experienced by employers in relation to the recruitment of graduates with specific knowledge and skills. In turn, the analysis of supply showed what effects of education are achieved in subjects related to the industry and what the degree of comprehensiveness of education in this field is. The following section presents a summary of these two perspectives, focusing on the comparison of difficulty of acquiring competences with the average level of their achievement in universities. Like in research conducted in previous years, it is important to make one important objection related to the potential discrepancies between the assessment of difficulty of acquiring and educating in universities.

In the case of perfect unanimity of opinions of business and higher education institutions, we would have to deal with a situation when competences which are difficult to acquire according to employers are not educated according to universities. In the case of the presented results, such unanimity in the tourist industry occurs only in relation to education of business knowledge and skills (correlation r=-0.66[24]) and soft skills (correlation r=-0.70). In the context of results from other industries, there are very high results indicating a similar perception of the achieved effects of education. In the case of specialist knowledge and skills, we observe another interrelation – there is virtually no connection between the declared difficulty/ease of acquiring competences and the achieved effects of education. In this case, we would like to point out that such a situation does not mean that the exclusive “fault” lies with the universities which assess their teaching offer inadequately. Although to some extent this may be one of the reasons for the discrepancy of assessments, several other interpretations are equally probable (they were described in from the previous years, their summary is shown below).

One of them is associated with the observed diversity of the level of development of HR processes in companies – the problem with finding suitable candidates may, therefore, result from the use of inappropriate tools of recruitment and selection, remuneration policy or onboarding programmes. The second reason may lie in the way the effects of education are defined. They are related to the qualifications gained by an average student – which means that there are graduates of both higher and lower level than this on the labour market. Another reason may be the fact that graduates of subjects identified as matching the profile of the industry are also employed in other sectors of the economy (e.g. in the outsourcing industry), in other cities and even abroad. Individual competences can be also understood differently by representatives of universities and business – what for some is a satisfactory level, for others may be below the acceptable minimum. Finally, not all of the sought competences can and should be educated by higher education institutions. Thus, the presented results of the balance of competences should be treated as a tool which should be used both by the universities and the companies to effectively establish cooperation and discuss curricula.

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[24] The correlation (or Pearson's r) is a measure of the linear relationship of two variables, in the range from -1 (perfectly negative relationship – any increase in the first variable is accompanied by a corresponding reduction in the second variable), through 0 (total lack of a relationship – any increase in the first variable is accompanied by a random change in the second variable), to 1 (perfectly positive relationship – any increase in the first variable is accompanied by a proportional increase in the second variable).

Figure 14 shows the relationship between the difficulty of acquiring specific competences and the achieved effects of education related to them for twenty most important competences in each of the industries (where 20 most important competences included those not analysed on the side of supply – e.g. English, they were replaced by the most important competences next on the list). The range of presented values, which allows showing clearly a division into competences which are the most difficult and relatively easier to acquire along with a division into effects achieved to a greater and lesser extent, was adopted arbitrarily on the chart (without this, most of competences would have to be regarded as relatively difficult to acquire and educated at the same time).

The results show a convergence of assessment of the companies and the universities as regards such competences such as **using office packages, integrity, presentation and propriety** and **establishing relationships** (educated and easily available) and, among others, **initiative/innovativeness, sales skills, organisation of own work** or **calculations/settlements** (less available and educated to a lesser extent). The largest discrepancies are related to several key competences which are relatively difficult to acquire and at the same time educated by universities. This applies, for example, to **marketing, PR and social media, cooperation** or **passion/interest in working in the industry**. It is also worth emphasising that, in comparison with other industries difficulty of acquiring these competences on the labour market is not particularly great.

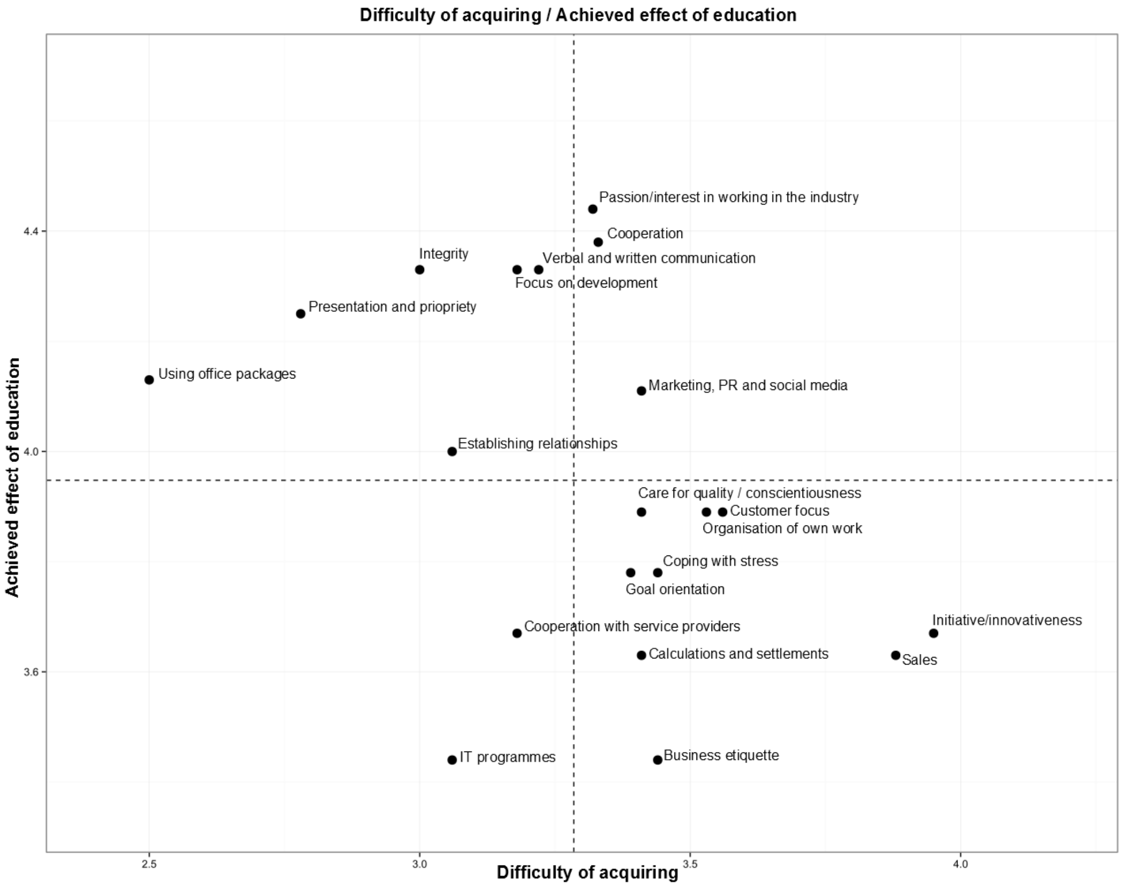

Figure 14. The matrix illustrating the interrelation between the difficulty of acquiring specific competences (point of view of employers) and the achieved effects of education (point of view of university) for 20 most important competences. For greater legibility, a truncated scale was used on the chart (from 2.5 to 4.0 for difficulty, and from 3.0 to 4.75 for the effects achieved).

In the area of specialist knowledge and skills, there is lack of a clear relationship between the assessment of the level of achievement of effects of education at the universities and the difficulty of acquiring them, in the opinion of employers. On the one hand, there is the competence which is hard to acquire and educated to a small extent associated with **CRM systems**, and on the other hand, **knowledge of the law, the ability to implement events and tourist programmes** and **preparing offers/tourist programmes** are, according to the universities, educated to a large extent, and according to business, very difficult to find on the labour market (see Fig. 15).

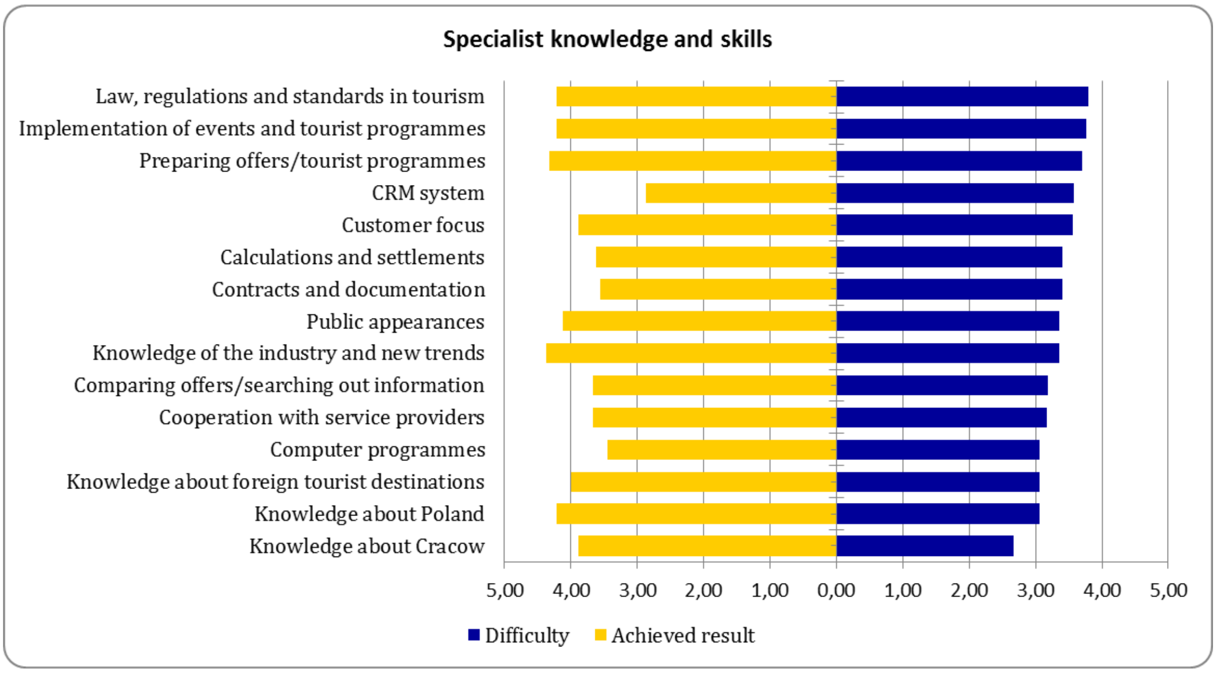

Figure 15. Comparison of difficulty of acquiring competences (point of view of employers) with the achieved effects of education (point of view of universities) in the area of "Specialist knowledge and skills"

In the case of business knowledge and skills (Fig. 16), fairly consistent opinions of the two communities can be observed. Competences which are, in the opinion of business, difficult to acquire among graduates are at the same time educated less often at the universities. This holds true, among others, in the case of **sales skills, finance and accounting** and **knowledge of the rules of conducting business activity**. On the other hand, there is the competence of **using office packages**, which is easily available and educated to a larger extent in higher education institutions.

Figure 16. Comparison of difficulty of acquiring competences (point of view of employers) with the achieved effects of education (point of view of universities) in the area of “Business knowledge and skills”

In terms of soft skills (Fig. 17) and other requirements (Fig. 18), similarly to the case of business competence, opinions of business and universities are largely consistent. **Initiative/innovativeness**, which is the most difficult to acquire, is also educated the least often at universities in this category. On the other hand, **integrity** is a competence which is relatively easy to acquire, and it is also the most often developed at universities.

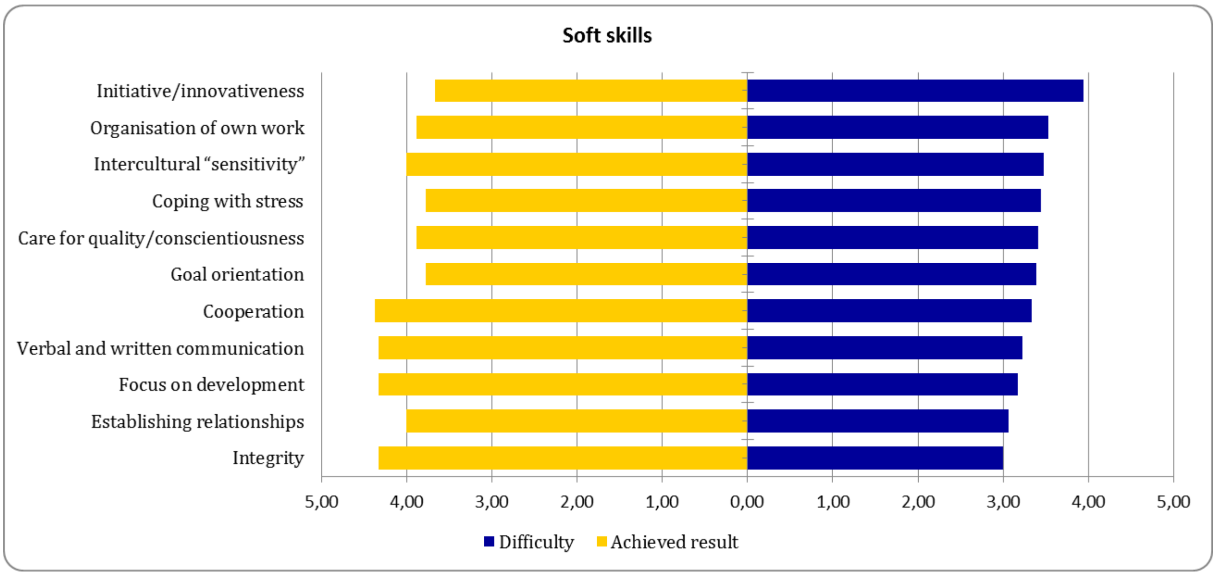

Figure 17. Comparison of difficulty of acquiring competences (point of view of employers) with the achieved effects of education (point of view of universities) in the area of “Soft skills”

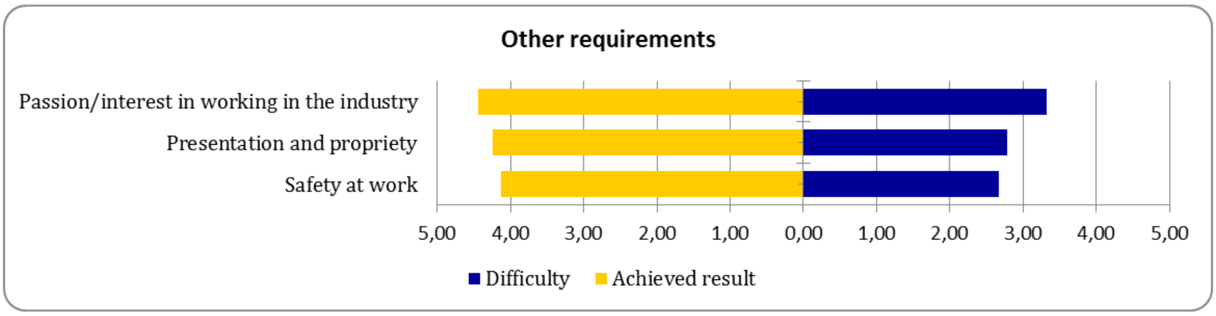

Figure 18. Comparison of difficulty of acquiring competences (point of view of employers) with the achieved effects of education (point of view of universities) in the area of “Other requirements”

FINAL CONCLUSIONS AND RECOMMENDATIONS

The tourism industry is of great importance for development of the city and influences the condition of many other segments of the economy. Not without reason, tourism has become one of the most important strategic directions of shaping public policies of the Cracow City Hall. One could enumerate for a long time factors which make the tourism industry in Cracow develop fast. It is worth mentioning at least the unique historical and cultural heritage, developing infrastructure (including the ICE Kraków, EXPO Kraków, Tauron Arena Kraków and the enlarged airport), expanded and diversified hotel base, vigorously operating carriers and the community of carriers or finally the brand of the city. Thanks to this all, apart from the traditionally strong forms of historical and cultural tourism, among others, entertainment, pilgrimage and congress tourism (the so-called meetings industry) is developing dynamically as well. According to the experts, the subsequent years are going to be better than very good for the industry.

However, the industry is not free from risks or challenges. The experts point out, among others, to too few car parks (especially for buses) and the negative consequences of air pollution. Paradoxically, the challenge for the city is also the number of tourists which, according to some experts, begins to have a negative effect on the experience of visitors, and in some areas may cause conflicts between the tourist and residential function of the city. Some experts also notice the risk of formation of the image of Cracow primarily as the city of “cheap” leisure – in this context, it is important to introduce promotional measures in order to prevent this and attract more and more tourists focused primarily on quality. Some challenges are also associated with the availability of appropriate human capital.

When it comes to the availability of graduates of higher education institutions, the situation in the tourism industry is complex. On the one hand, generally there is no problem with the number of graduates of tourist subjects – there is rather a slight oversupply. However, some graduates find work outside the industry, on the other hand, professional education in many cases is not, according to the companies, needed and therefore graduates in other subjects are searched for (e.g. philologies and marketing and management). The growing sector of BPO/SSC, which offers students and graduates of Cracow universities attractive employment conditions, is exerting stronger and stronger pressure on the tourist companies. Despite this fact, large number of students available in Cracow allows companies in the industry to conduct an effective recruitment to the “line” positions which do not require specialist knowledge and skills. Such positions are often treated as temporary work and are characterised by a large rotation. In this context, a disadvantage of a relatively large segment of the tourism industry is flat structure and quite limited possibility of promotion. In all cases, looking on the labour market more broadly than just through the perspective of entry level positions, a significant part of the interviewed representatives of business indicated the **problem with acquiring specialists-managers on the labour market** (the higher the position, the greater the problems). In this respect, it is worth noting **not only formal education**, which should provide at least the basics in this regard, but also **lifelong learning**, **self-development** of graduates interested in a real career in the industry and **internal training and development programmes of companies**.

Summary of the results of quantitative research in the field of balance of competences is presented in Table 8 below. While interpreting the results one should bear in mind, what has already been mentioned several times, that companies recruit for different types of positions. This means that the **catalogue of the most important competences for each of the industries is a conglomerate of different expectations, which are not always related to only one**

position and, therefore, it is not always possible for a graduate of one subject of study to have them all.

Main findings of the balance of competences (summary)	
The most important competences currently sought by employers	English, integrity, customer focus, care for quality/conscientiousness, organisation of own work, presentation and propriety, time flexibility and mobility, verbal and written communication, sales, using MS Office, OpenOffice or Google Docs package
The most important specialist competences currently sought by employers	Customer focus, calculations and settlements, computer programmes, cooperation with service providers, comparing offers/searching out information, preparing offers/tourist programmes, contracts and documentation, implementation of events and tourist programmes
The most important competences sought by employers – in five years	Customer focus, English, initiative/innovativeness, verbal and written communication, integrity, care for quality/conscientiousness, presentation and propriety, time flexibility and mobility, passion/interest in working in the industry, organisation of own work, cooperation, using MS Office, OpenOffice or Google Docs package, sales, business etiquette
The largest relative increase in the importance of competences in 5 years	Initiative/innovativeness, verbal and written communication, customer focus, German, Russian, French, Spanish, comparing offers/searching out information
Competences which are hardest to get on the labour market and important at the same time	Initiative/innovativeness, sales, customer focus, organising own work, coping with stress, business etiquette
Competences most easily available on the labour market and important at the same time	Using office packages, English, presentation and propriety, integrity
The most commonly achieved effects of education important from the perspective of employers	Integrity, knowledge about Poland, preparing offers/tourist programmes, laws, regulations and standards in tourism, knowledge of the industry and new trends, cooperation, establishing relationships, passion/interest in working in the industry

Table 8. Synthetic summary of the results of the balance of competences.

The most important competences currently sought by employers include **knowledge of English, integrity, customer focus and care for quality/conscientiousness**. In five years, the catalogue of most wanted competences will not change to a significant extent and the top of the list will include: **customer focus, English, initiative/innovativeness, verbal and written communication, integrity, care for quality/conscientiousness, presentation and propriety.** The largest relative increase in the value of competence occurs, inter alia, in the case of **initiative/innovativeness, verbal and written communication, customer focus and knowledge of foreign languages** (German, Russian, French, Spanish, Italian). As indicated by the interviews, in the case of knowledge of foreign languages, bilingualism is at least as important as knowledge of language other than English, like in the case of BPO/SSC, combination of at least good/very good knowledge of English and very good/excellent knowledge of a second language is crucial. From among the important competences, those which are most difficult to acquire on the labour market include **initiative/innovativeness, sales skills, customer focus, organisation of own work, coping with stress** and **business etiquette**.

At a general level, assessment and opinions of the business community related to the educational offer of Cracow's higher education institutions are divided. Substantial part of representatives of business is of the opinion that the content of the curriculum at first and second degree studies is good, and the problem is the insufficient number of internships and other initiatives that would enable students to perfect their skills and verify acquired knowledge. Representatives of some of the companies are very reluctant to participate in consultations on the curriculum, meetings/workshops for students, as well as engage in conducting regular classes and admit students to internship in their companies. Such cooperation certainly leaves much to be desired, though there are also cases of its positive assessment. These discrepancies in the assessment of willingness to cooperate and the general attitude prove that if one manages to establish relationships and get to know better representatives of the "other side," achieving synergy and mutual benefit is not so difficult. **Both representatives of business and universities noticed some negative trends when it comes to the attitude and commitment of students.**

In the context of cooperation between business and science, except for matters directly related to teaching, it is actually hard to find examples of systematic cooperation. Representatives of companies **assess activities of academic career centres very positively**, through which one can acquire very good interns and, to a lesser extent, also candidates for work. However, this cooperation is still not universal and in many cases students are looking for internship on their own, being unaware of the companies which would gladly take them in. In terms of purely scientific cooperation, there are no spectacular successes. **In this area, universities and industry organisations cooperate with public authorities (including the Cracow City Hall) to a greater extent**, e.g. in the case research on tourism flows. In this context, it is worth mentioning the importance of this type of research for taking accurate informed decisions which enable conscious shaping of public policies relating to the travel industry. It is important also for the representatives of business to be aware of this, **increasing their openness to cooperation with research teams and making relevant information available**. Involvement in this type of initiatives entails obvious costs (mostly in terms of time), nevertheless, potential benefits for the industry seem to outweigh them. Perhaps **greater integration of representatives of business** would also help here (the experts indicate mainly the area of hotel industry).

As regards the role of the Cracow City Hall, the majority of experts and representatives of companies **assess the attitude and initiative of the Cracow's municipality very positively**. The extremely good cooperation of the city and the province is also seen positively. **Representatives of the industry appreciate** that the CCH consults its decisions, presents its visions and strategies of action and organises meetings in a broad group of stakeholders. Certainly an important initiative is the **Tourism Forum**, although in this case some of the entities postulate return to its original form, which consisted in working out solutions and discussions, rather than the place where presentation of accomplishments and successes is gaining in importance. The interviews also indicate that, in the context of improving the tourism policy of Cracow, at the operational level but not only, an extremely useful source of information are companies and tourist guides as well as other persons having direct contact with tourists.

ANNEX 1. LIST OF COMPETENCES AND EFFECTS OF EDUCATION[25]

Specialist knowledge and skills		
No.	Name	Description of competences and effects of education
1	Calculations and settlements	Ability to prepare detailed calculations and settle events
2	Customer focus	Focus on the highest standard of customer service in accordance with the applicable procedures. Proactivity in the study of needs and care for customer satisfaction.
3	Comparing offers/searching out information	Ability to search out, process and evaluate information needed to analyse the offer and provide customers with the required knowledge. Ability to use booking portals effectively.
4	Law, regulations and standards in tourism	Knowledge and understanding of the law, rules, regulations, acts and norms and standards specific to the functioning of the tourism industry
5	Computer programmes	Ability to use reservation systems and other systems and programmes supporting management and operation of a hotel/travel agency
6	Preparing offers/tourist programmes	Ability to prepare offers/tourist programmes (individual and group), together with appropriate documentation
7	Implementation of events and tourist programmes	Ability to organise and conduct parties, events and tourist programmes
8	CRM systems	Ability to operate CRM (Customer Relationship Management) programmes
9	Contracts and documentation	Knowledge about the construction of contracts concluded with customers and service providers. Knowledge of the principles of keeping records and circulation of documents. Ability to prepare contracts and documents typical of tasks performed in the job.
10	Knowledge about Cracow	Knowledge about geography, history, architecture, culture, art and tourist attractions of Cracow
11	Knowledge of the industry and new trends	Knowledge about the entities operating in the industry and their environment, understanding the specificity and context of functioning of the industry and awareness of the specificity of services provided in the industry and related to the division of positions and responsibilities. Knowledge of new trends and directions of development, including those related to the hotel, travel and gastronomic industry
12	Knowledge about Poland	Knowledge about geography, history, architecture, culture, art and tourist attractions of Poland
13	Knowledge about foreign tourist destinations	Knowledge of geography, history, architecture, culture, art and tourist attractions in popular tourist destinations
14	Cooperation with service providers	Knowledge and understanding of social and professional roles in the industry and related segments. Ability to work effectively with suppliers (e.g. transport, gastronomy, hotel industry, etc.) coordinating the implemented activities.
15	Public appearances	Ability to deliver speeches/public presentations, speak to a larger number of people. Knowledge of the principles of voice production and presentation techniques.

[25] The catalogues of competences and effects of education presented here are the result of analysis of job advertisements, existing data (in the case of tourism, among others, the Sectoral Qualifications Framework for the Tourism Sector and the Competence Profile of Tour Guide of the Polish Chamber of Tourism) and consultation with the industry experts and companies. There is an important reservation related to the fact that companies recruit for various positions, requiring diverse catalogue of competences (often also intersectoral). This Balance of competences adopted the perspective of a comprehensive demand for competences in each of the analysed industries. Thus, this does not mean that all competences presented here should be educated in one subject or held by a particular employee – in both cases it would be impossible. Detailed structure of demand for competences is presented in the section "Demand Analysis."

Business knowledge and skills		
No.	Name	Description of competences and effects of education
1	Business etiquette	Knowledge of and ability to use in practice the rules of business savoir-vivre. Ability to behave according to the standards, choose the right outfit and language adequate to the situation, also in the context of customer relations and international cooperation
2	Finance and accounting	Knowledge and understanding of basic economic aspects of tourist activities, understanding of financial aspects and knowledge of the basics of accounting
3	Marketing, PR and social media	Knowledge of marketing methods/techniques and PR, and ability to use them in practice in the preparation of offers and promotional materials, and marketing strategy. Ability to use social media to communicate with the current and potential customers.
4	Using MS Office, OpenOffice or Google Docs	Effective use of the possibilities of basic office software packages
5	Conducting business activity	Knowledge of the basic principles of conducting business activity in the industry. Practical knowledge of the specifics of an enterprise in the tourism industry.
6	Sales	Ability to prepare and analyse trade and business offers, including diagnosis of customer needs and expectations. Ability to actively acquire customers, present the offer and negotiate and finalise the sale
7	Project and team management	Ability to work effectively in groups using industry-specific project management methodologies. Ability to direct work of a project team.

Soft skills		
No.	Name	Description of competences and effects of education
1	Intercultural “sensitivity”	Putting knowledge of intercultural differences into practise, adapting own actions to different cultural patterns
2	Initiative/innovativeness	Starting and carrying out new activities and implementing innovative, original solutions to improve work
3	Verbal and written communication	Preparation and submission of written and verbal communications, drafting clear written reports and fluency in speech
4	Focus on development	Desire to develop own knowledge and skills, also in new fields and areas
5	Establishing relationships	Ability to establish and maintain lasting relationships with other people
6	Organisation of own work	Planning own work and organisation of activities aimed at implementation of a plan, prioritising tasks
7	Goal orientation	Commitment to the achievement of short- and long-term goals established for the position
8	Coping with stress	Easiness and effectiveness of acting in difficult situations
9	Care for quality/conscientiousness	Acting in accordance with the rules, regulations and procedures of an organisation, precision and meticulousness in performing tasks
10	Integrity	Observing the accepted moral standards
11	Cooperation	Effective teamwork, focus on achieving group objectives

Foreign languages and other requirements		
No.	Name	Description of competences and effects of education
1	Safety at work	Knowledge in the field and understanding of health and safety at work, sanitary regulations and fire protection
2	Time flexibility and mobility	Willingness to work in shift work system, flexibility in terms of working hours and trips related to the performance of business duties

3	English	Ability to speak foreign language enabling efficient and effective communication, both verbal and written.
4	French	
5	Spanish	
6	German	
7	Russian	
8	Italian	
9	Passion/interest in working in the industry	Having a genuine passion, commitment and desire for professional development in the tourism industry
10	Presentation and propriety	Impeccable appearance and good manners

ANNEX 2. METHODOLOGY AND DESCRIPTION OF TOOLS USED

The methodology used was based almost entirely on the models developed in the previous years. At the initial stage, a number of consultations with industry experts and the analysis of job advertisements were conducted. The preliminary lists of competences developed this way were then consulted with the representatives of companies in the course of in-depth expert interviews. After completion of the qualitative research, in-depth quantitative research was conducted among companies and universities, and additionally further in-depth interviews were carried out with the latter.

In terms of selection of a sample, where it was possible, we followed the Polish Classification of Activity (PCA), supplemented with the indications of experts and the analysis of trade fairs of the industry and registers of companies. In this context, we would like to thank once again the representatives of ASPIRE, whose assistance proved to be extremely important. In each of the analysed industries, invitation to participate in the research was sent to all major companies seated in Cracow and to a selected purposive sample of smaller entities. Even though a direct consequence of this approach is the inability to evaluate the overall employment in the industry (lack of a random sample) and certain limitation in conclusions, as demonstrated by previous research, this approach allows much better estimation of the market trends and the expected dynamics of demand for competences.

In order to ease time burden for the respondents, an attempt to reduce the list of soft and business skills by integrating them into more general categories was made. The question of responsibility attributed to higher education institutions for the education of individual competences was also eliminated – the response pattern of the previous years was consistent between remote branches and in the opinion of the team the benefit from the repetition of research in this area is much smaller than the costs associated with it.

We present all the key stages of conducted research, step by step, below:

1. **Preliminary stage**
    a. In-depth interviews with experts, people associated with the industry and consultation with the Cracow City Hall and the Provincial Labour Office in Cracow, aimed at clarifying definition of the industry, specifying the context of its operation and identification of key actors (on the side of business and universities).
    b. Desk research of the industry and analysis of job advertisements, the main objective of which was to identify the key challenges facing the industry and to create a preliminary list of competences sought by employers.

2. **Analysis of demand for competences**
    a. In-depth interviews with representatives of selected companies giving an insight into the experience of the industry related to recruitment, selection and development of employees, assessing and supplementing the list of sought competences (sheet of demand).
    b. Creating and testing the Sheet of demand tool.
    c. Creating a research sample of companies (in the case of the tourist industry, on the basis of the PCA, desk research, industry registers and indications of experts and

companies, the initial list of companies invited to participate in the research consisted of 128 entities).

d. Survey of companies, allowing to collect quantitative data on current and projected market needs in terms of the most important competences of graduates of Cracow higher education institutions and assess the difficulty of acquiring them. Additionally, information related to employment plans (in 2016 and 2021), competences which are necessary for graduates to get promotion in a company and the best, from the point of view of companies, subjects and specialisations whose profile matches activities of the company was also collected (the analysis used data from 24 companies, employing in various forms over a thousand employees).

3. **Analysis of supply of competences**
    a. Development and testing the Sheet of supply tool.
    b. Creation of a research sample of subjects of study and specialisations in higher education institutions (based on information obtained from desk research, indications of experts and companies, the initial list of subjects of study, including postgraduatestudies, invited to participate in the research amounted to 17).
    c. Structured interviews combined with filling in the sheet of supply aimed at, in addition to obtaining quantitative data about the currently achieved effects of education and projections of the number of graduates in the future, familiarising with the general context of functioning of a given subject, challenges in cooperation with business and expectations towards the company and the CCH.
    d. On-line survey among the representatives of universities responsible for shaping the curricula. The main objective was to collect quantitative data on the currently achieved effects of education and projection of the number of graduates in the future. Moreover, information on additional effects of education achieved in a given subject, which may be important for the industry, was obtained. The analysis used data from 9 subjects of study (35 specialisations), which will be completed by more than 1,200 people in 2016.

SHEET OF DEMAND

A tool dedicated to study demand for competence was used in two forms: an electronic on-line (using the LimeSurvey software) and MS Excel worksheet (when the interviewed company preferred direct contact with the interviewer).

The tool consisted of 3 parts:

1. **Imprint and plans of the company**

- name of the company;

- number of people employed by the company or its Cracow branch on the basis of employment contract;

- number of people employed by the company or its Cracow branch on the basis of civil law contracts or self-employment;

- names of positions for which recruitment is conducted in the company most often (up to 5 positions);

- plan for employment of graduates (those who completed higher education in the last 12 months) on the basis of an employment contract, civil law contracts or self-employment (in 2016 and 2021).

2. **Assessment of competences from 4 thematic groups (in the following order: specialist knowledge and skills, business knowledge and skills, soft skills, foreign languages and other requirements – the list is available in Annex 1) based on three criteria:**

- importance at present (How important from the point of view of your company is it for students and graduates to have a given competence, where 1 means “particularly unimportant” and 5 means “crucially important”);

- importance in 5 years (How important from the point of view of your company will it be for students and graduates to have a given competence in 5 years, where 1 means “particularly unimportant” and 5 means “crucially important”);

- difficulty in acquiring (How difficult it is at present to acquire a person with the expected level of a given competence, where 1 means “very easy to acquire“ and 5 means “very difficult to acquire”);

- identification and assessment according to the same criteria of up to four additional competences in each category, not included on the previously presented lists.

3. **Additional information:**

- indication of 5 subjects of study best suited to the needs of the company (up to 5 subjects; if it is relevant, indication of the name of the university);

- indication of a maximum of 5 competences which are crucial in the context of promotion of a graduate employed in the company;

- additional comments.

SHEET OF SUPPLY

A tool dedicated to the study of supply of competences, similarly to demand, was used in two forms: an electronic on-line (using the LimeSurvey software) and MS Excel worksheet (when the person representing a given subject preferred direct contact with the interviewer).

The sheet of supply consisted of 3 parts:

1. **Imprint:**

- name of the university, faculty/department, institute and subject of study;

- indication of modes of education available in the subject (full-time, part-time, etc.);

- indication of the levels of study offered in a given subject (first degree, second degree, postgraduate studies, etc.);

- indication of different specialisation paths/profiles/specialities achieving effects of education similar from the point of view of the analysed industry;

- planned number of graduates of each of the above-mentioned paths (in 2016 and 2021).

2. **Assessment of competences from 4 thematic groups (in the following order: specialist knowledge and skills, business knowledge and skills, soft skills, other requirements - the list is available in Annex 1) based on one criterion:**

- achieved effect of education (In your opinion, to what extent are given effects of education achieved in the subject of study which the survey concerns?, where 1 means “Not at all achieved,” and 5 means “Achieved to a very high degree”).

3. **Additional information:**

- indication of additional effects of education achieved with regard to a given subject which were not included on the list, and are or potentially can be important from the point of view of the industry;

- indication of information about the obligatory classes in modern language and the possibility of benefiting from education of other languages free of charge;

- additional comments.