



# **BALANCE OF COMPETENCES 2015**

**KEY CONCLUSIONS FROM THE PERFORMED STUDY**

## 1.1. Introduction to the study

Objective: **comparison of expectations of selected sectors in Kraków:**

- tourism,
- transport and logistics,
- cross-sectional studies of foreign languages,

**with educational results achieved by Kraków's universities in terms of language competences of students and graduates of universities.**

Institutions engaged in the study:

- Centre for Evaluation and Analysis of Public Policies of the Jagiellonian University (leading expert: prof. Jarosław Górniak) and Interdisciplinary Centre for Organizational Research and Development by the Institute of Psychology of the Jagiellonian University (leading expert: prof. Małgorzata Kossowska),
- City Council of Kraków,
- Association ASPIRE (partner of language studies).

## 1.2. Performance of the study - overview

### **Within the performed study:**

Hundreds of job advertisements in the tourism and transport and logistics sectors were analysed, as well as over 3000 job advertisements in terms of the demand for foreign languages.

Tens of consultations and in-depth interviews were conducted with experts.

Almost 50 companies employing over 2000 employees in total were analysed.

13 fields of study and education were analysed, with the total number of graduates exceeding 2000 in 2016.

Over 50 language centres, colleges, schools and philological fields of study were analysed, with approx. 50000 students .

Approx. 800 students took part in the study.

## 1.3. Methodology of the study

### DEMAND

**Preliminary actions** – consultations with experts, analysis of job advertisements, analysis of sector reports;

**Structured interviews** – companies' managers, HR departments, managers;

**Elaboration of the Demand Datasheet** – list of competences with definitions (specialist knowledge, specialist skills, knowledge and business skills, soft skills, other expectations);

**On-line survey** – expected number of recruitment processes among graduates (2016 and 2021), requirements with regard to competences, evaluation of importance, difficulties in obtaining competences and tasks of universities.

### SUPPLY

**Preliminary actions** – elaboration of expected teaching results and the “Supply Datasheet”;

**On-line survey**– persons responsible for curricula; evaluation of the educational results and tasks of universities in terms of their teaching;

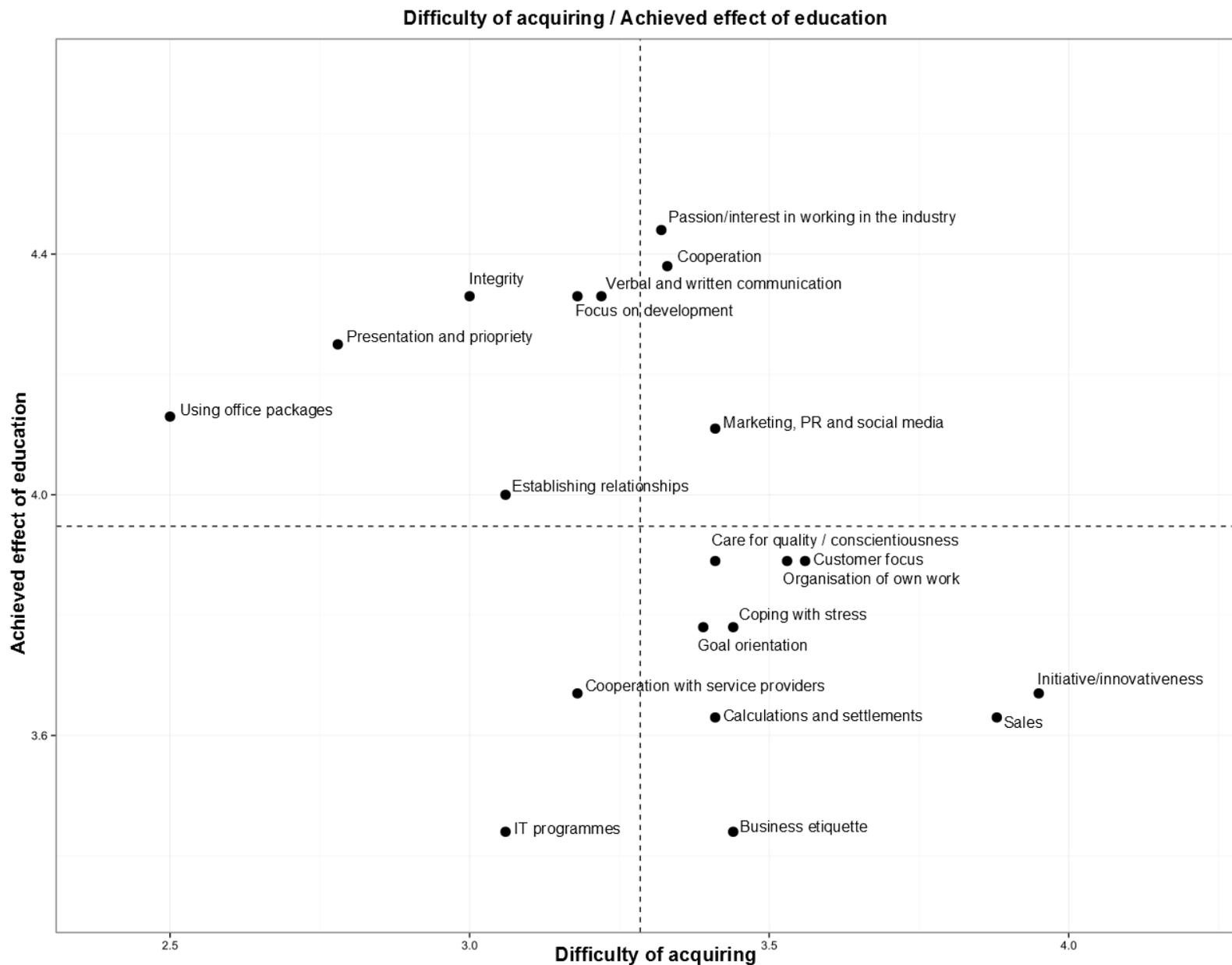
**Structured interviews** – representatives of selected fields of study at universities.

## 2.1. Tourism sector - Competences today and tomorrow

15 top competences (requirements) today	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

15 top competences (requirements) in future	Importance 2016
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

## 2.2. Tourism sector – Balance of competences (difficulties in recruitment and achieved educational results)



## 2.3. Tourism sector – dynamics of the employing of graduates

Graduates to be employed in 2016	Graduates to be employed in 2021
<b>20.6 %*</b>	<b>30.9 %*</b>
<b>Increase in the dynamics of employing graduates</b>	

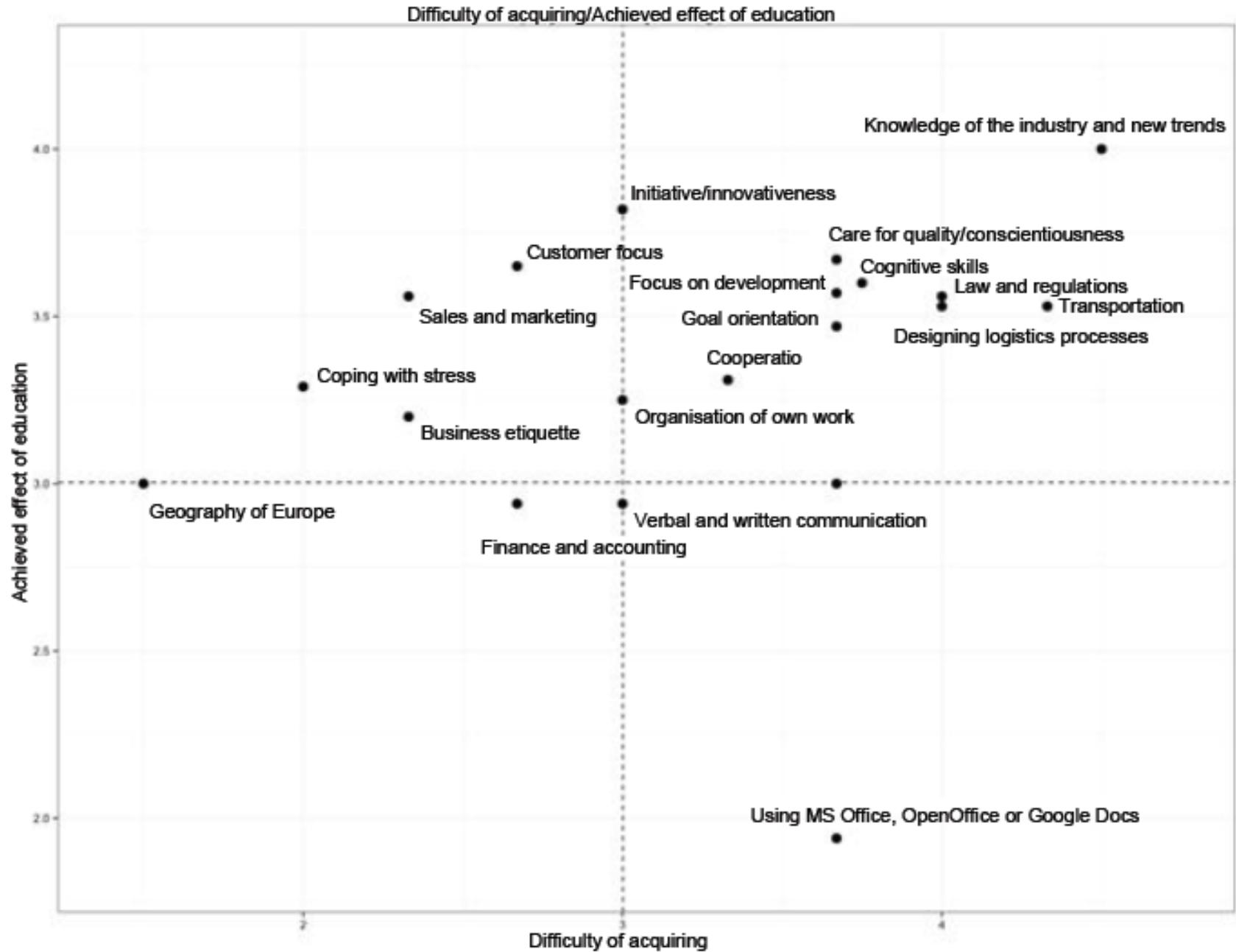
\* Graduates to be employed in 2016 and 2021 as a percentage of the current number of employees(incl. all legal forms of employment).

### 3.1. Transport and logistics – competences nowadays and in future

15 top competences (requirements) nowadays	Importance 2016
Integrity	4,90
Transport	4,80
English	4,75
Taking care of quality/diligence	4,74
Stress management	4,74
Oral and written communication	4,53
Operation of MS Office, OpenOffice or Google Docs	4,50
Customer focus	4,45
Sales and marketing	4,44
Driving licence cat. B	4,40
Initiative/innovativeness	4,39
Organizing own work	4,37
Cognitive capabilities	4,33
German	4,32
Designing of processes in logistics	4,26

15 top competences (requirements) future	Importance 2021
English	4,89
Transport	4,83
Taking care of quality/diligence	4,83
Integrity	4,79
Stress management	4,78
Organizing own work	4,67
Sales and marketing	4,65
Customer focus	4,63
Knowledge about sectors and new trends	4,58
Cognitive capabilities	4,53
Operation of MS Office, OpenOffice or Google Docs	4,53
Oral and written communication	4,50
Driving licence cat. B	4,50
German	4,50
Geography of Europe	4,47

## 3.2. Transport and logistics – Balance of competences (difficulties in recruitment and achieved educational results)



### 3.3. Transport and logistics – dynamics in the employing of graduates

Graduates to be employed in 2016	Graduates to be employed in 2021
<b>5.3%*</b>	<b>7.5% *</b>
<b>Increase in the dynamics of employing graduates</b>	

\* Graduates to be employed in 2016 and 2021 as a percentage of the current number of employees(incl. all legal forms of employment).

## 4.1. Foreign languages – demand of employers (job advertisements) – all sectors

	Foreign language	Ogółem	
		N	%
1	English	2209	72.69%
2	German	278	9.15%
3	French	150	4.94%
4	Italian	70	2.30%
5	Spanish	58	1.91%
6	Dutch	43	1.41%
7	Swedish	41	1.35%
8	Czech	34	1.12%
9	Russian	31	1.02%
10	Norwegian	26	0.86%
11	Dannish	24	0.79%
12	Finnish	21	0.69%
13	Hungarian	18	0.59%
14	Slovak	16	0.53%
15	Portuguese	15	0.49%
16	Netherlandish	12	0.39%
17	Greek	9	0.30%
18	Flemish	8	0.26%
19	Romanian	8	0.26%
20	Turkish	6	0.20%
...	...	...	...
30	Foreign language	83	2.73%
31	No foreign language required	763	25.11%

Foreign language	Entry level	
	N	%
English	715	82.7%
German	108	12.5%
French	69	8.0%
Swedish	25	2.9%
Dutch	23	2.7%
Hungarian	19	2.2%
Dannish	18	2.1%
Spanish	18	2.1%
Norwegian	18	2.1%
Italian	16	1.8%
Czech	15	1.7%
Finnish	15	1.7%
Portuguese	9	1.0%
Russian	9	1.0%
Flemish	7	0.8%
Greek	7	0.8%
Slovak	7	0.8%
Ukrainian	7	0.8%
Netherlandish	5	0.6%
Turkish	4	0.5%
...	...	...
Foreign language	35	4.0%
No foreign language required	91	10.5%

## 4.2. Foreign languages – required level of proficiency in foreign languages (job advertisements) – all sectors

Foreign language	A1	A2	B1	B2	C1	C2	Not specified
English	1.8%	9.3%	<b>16.6%</b>	<b>28.2%</b>	<b>32.9%</b>	0.6%	10.5%
German	0.0%	5.2%	<b>24.2%</b>	<b>39.4%</b>	<b>22.9%</b>	2.6%	5.6%
French	0.0%	7.5%	<b>22.5%</b>	<b>43.3%</b>	<b>20.0%</b>	4.2%	2.5%
Italian	0.0%	8.2%	<b>27.9%</b>	<b>34.4%</b>	<b>19.7%</b>	6.6%	3.3%
Spanish	0.0%	2.6%	<b>35.9%</b>	<b>35.9%</b>	<b>15.4%</b>	7.7%	2.6%
Dutch	0.0%	2.4%	<b>31.0%</b>	<b>33.3%</b>	<b>31.0%</b>	2.4%	0.0%
Swedish	0.0%	2.6%	<b>28.9%</b>	<b>44.7%</b>	<b>21.1%</b>	2.6%	0.0%
Czech	0.0%	3.3%	<b>16.7%</b>	<b>43.3%</b>	<b>30.0%</b>	3.3%	3.3%
Russian	0.0%	5.0%	<b>20.0%</b>	<b>20.0%</b>	<b>30.0%</b>	20.0%	5.0%
Norwegian	0.0%	3.8%	<b>30.8%</b>	<b>46.2%</b>	<b>19.2%</b>	0.0%	0.0%
Dannish	0.0%	4.2%	<b>25.0%</b>	<b>50.0%</b>	<b>20.8%</b>	0.0%	0.0%
Finnish	0.0%	4.8%	<b>28.6%</b>	<b>38.1%</b>	<b>28.6%</b>	0.0%	0.0%
Hungarian	0.0%	11.8%	<b>35.3%</b>	<b>35.3%</b>	<b>11.8%</b>	0.0%	5.9%
Slovak	0.0%	0.0%	<b>14.3%</b>	<b>57.1%</b>	<b>21.4%</b>	0.0%	7.1%
Portuguese	0.0%	0.0%	<b>53.8%</b>	<b>23.1%</b>	<b>23.1%</b>	0.0%	0.0%
Netherlandish	0.0%	0.0%	<b>16.7%</b>	<b>66.7%</b>	<b>8.3%</b>	0.0%	8.3%
Other foreign languages	0.0%	6.0%	<b>34.0%</b>	<b>30.0%</b>	<b>16.0%</b>	4.0%	10.0%

### 4.3. Foreign languages – demand of employers (job advertisements) – BPO/SSC sector

No.	Foreign language	In total	
		N	%
1	English	971	88.19%
2	German	183	16.62%
3	French	112	10.17%
4	Italian	56	5.09%
5	Spanish	43	3.91%
6	Dutch	40	3.63%
7	Swedish	37	3.36%
8	Czech	28	2.54%
9	Norwegian	25	2.27%
10	Dannish	23	2.09%
11	Finnish	20	1.82%
12	Hungarian	16	1.45%
13	Russian	15	1.36%
14	Portuguese	14	1.27%
15	Slovak	13	1.18%
16	Netherlandish	12	1.09%
17	Greek	9	0.82%
18	Flemish	7	0.64%
19	Romanian	5	0.45%
20	Hebrew	4	0.36%
...	...	...	...
26	Foreign language	53	4.81%
27	No foreign language required	29	2.63%

Foreign language	Entry level	
	N	%
English	552	88.04%
German	113	18.02%
French	76	12.12%
Italian	36	5.74%
Dutch	30	4.78%
Swedish	29	4.63%
Dannish	21	3.35%
Norwegian	21	3.35%
Czech	20	3.19%
Spanish	20	3.19%
Finnish	17	2.71%
Portuguese	10	1.59%
Hungarian	10	1.59%
Netherlandish	9	1.44%
Russian	9	1.44%
Slovak	9	1.44%
Greek	8	1.28%
Flemish	6	0.96%
Hebrew	3	0.48%
Turkish	3	0.48%
...	...	...
Foreign language	22	3.51%
No foreign language required	10	1.59%

#### 4.4. Foreign languages – required level of proficiency in foreign languages (job advertisements) – BPO/SSC sector

Foreign language	A1	A2	B1	B2	C1	C2	Not specified
English	0.1%	2.3%	16.2%	<b>35.9%</b>	<b>39.2%</b>	0.6%	5.8%
German	0.0%	0.0%	10.3%	<b>50.3%</b>	<b>34.5%</b>	0.6%	4.2%
French	0.0%	1.1%	6.4%	<b>53.2%</b>	<b>33.0%</b>	1.1%	5.3%
Italian	0.0%	0.0%	7.8%	<b>43.1%</b>	<b>39.2%</b>	3.9%	5.9%
Dutch	0.0%	0.0%	2.6%	<b>48.7%</b>	<b>46.2%</b>	0.0%	2.6%
Swedish	0.0%	0.0%	2.9%	<b>60.0%</b>	<b>34.3%</b>	0.0%	2.9%
Spanish	0.0%	0.0%	0.0%	<b>53.3%</b>	<b>40.0%</b>	3.3%	3.3%
Czech	0.0%	0.0%	3.8%	<b>42.3%</b>	<b>46.2%</b>	3.8%	3.8%
Norwegian	0.0%	0.0%	4.0%	<b>60.0%</b>	<b>36.0%</b>	0.0%	0.0%
Dannish	0.0%	0.0%	4.3%	<b>60.9%</b>	<b>34.8%</b>	0.0%	0.0%
Finnish	0.0%	0.0%	5.0%	<b>55.0%</b>	<b>40.0%</b>	0.0%	0.0%
Hungarian	0.0%	0.0%	13.3%	<b>46.7%</b>	<b>33.3%</b>	0.0%	6.7%
Netherlandish	0.0%	0.0%	0.0%	<b>75.0%</b>	<b>16.7%</b>	0.0%	8.3%
Portuguese	0.0%	0.0%	0.0%	<b>66.7%</b>	<b>33.3%</b>	0.0%	0.0%
Russian	0.0%	0.0%	9.1%	<b>27.3%</b>	<b>27.3%</b>	18.2%	18.2%
Slovak	0.0%	0.0%	0.0%	<b>45.5%</b>	<b>36.4%</b>	9.1%	9.1%
Other foreign languages	0.0%	0.0%	6.4%	<b>46.8%</b>	<b>38.3%</b>	0.0%	8.5%

## 4.5. Foreign languages – employers' demand (job advertisements) – IT sector

No.	Foreign language	In total	
		N	%
1	English	590	87.67%
2	German	32	4.75%
3	French	15	2.23%
4	Spanish	6	0.89%
5	Russian	6	0.89%
6	Italian	4	0.59%
7	Turkish	2	0.30%
8	Czech	1	0.15%
9	Dannish	1	0.15%
10	Finnish	1	0.15%
11	Flemish	1	0.15%
12	Dutch	1	0.15%
13	Norwegian	1	0.15%
14	Swedish	1	0.15%
15	Foreign language	20	2.97%
16	No foreign language required	75	11.14%

Foreign language	Entry level	
	N	%
English	269	85.67%
German	17	5.41%
French	7	2.23%
Russian	2	0.64%
Czech	1	0.32%
Dannish	1	0.32%
Finnish	1	0.32%
Flemish	1	0.32%
Netherlandish	1	0.32%
Spanish	1	0.32%
Norwegian	1	0.32%
Swedish	1	0.32%
Foreign language	10	3.18%
No foreign language required	39	12.42%

## 4.6. Foreign languages – required level of proficiency in foreign languages (job advertisements) – IT sector

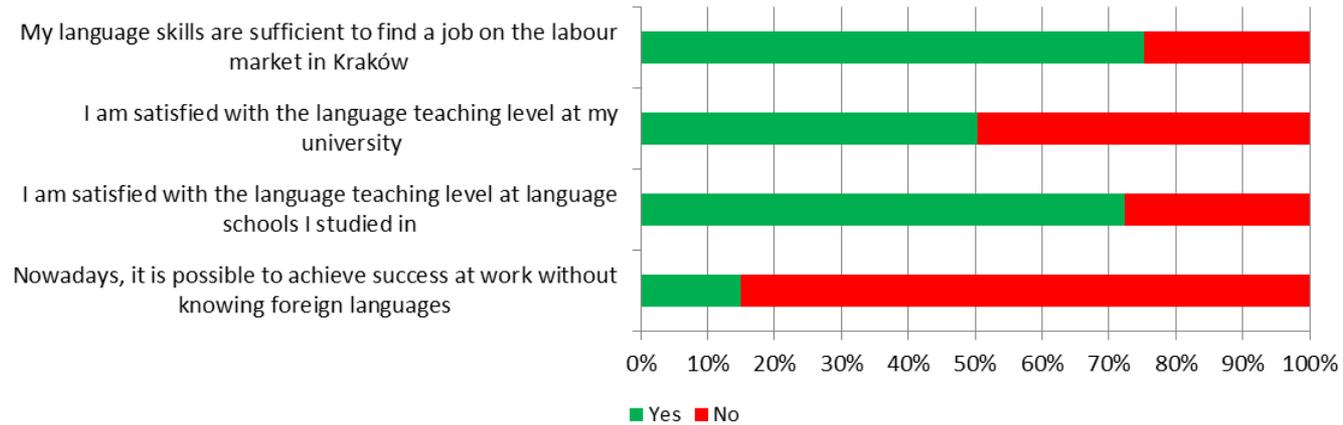
Foreign language	A1	A2	B1	<b>B2</b>	<b>C1</b>	C2	Not specified
English	0.0%	4.1%	19.0%	<b>26.3%</b>	<b>31.6%</b>	0.0%	19.0%
German	0.0%	0.0%	4.5%	<b>36.4%</b>	<b>40.9%</b>	0.0%	18.2%
French	0.0%	0.0%	12.5%	<b>50.0%</b>	<b>12.5%</b>	12.5%	12.5%
Other foreign languages	0.0%	0.0%	8.3%	<b>62.5%</b>	<b>20.8%</b>	4.2%	4.2%

## 4.7. Foreign languages – supply of competences

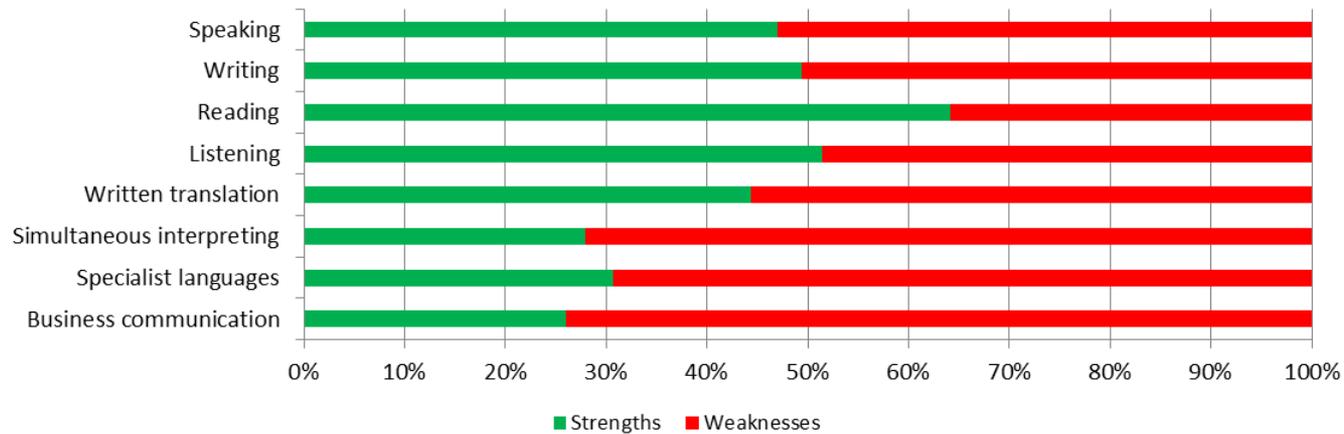
No.	Foreign language	A1	A2	B1	B2	C1	C2	N	%
1	English	103	838	<b>10133</b>	<b>18207</b>	6684	1481	37446	73.94%
2	German	1452	1294	<b>1432</b>	<b>563</b>	160	371	5272	10.41%
3	Spanish	1301	343	<b>195</b>	<b>108</b>	12	280	2239	4.42%
4	Russian	383	309	<b>303</b>	<b>565</b>	28	272	1860	3.67%
5	French	291	668	<b>141</b>	<b>58</b>	40	0	1198	2.37%
6	Italian	668	141	<b>58</b>	<b>40</b>	0	176	1083	2.14%
7	Norwegian	150	100	<b>50</b>	<b>50</b>	0	0	350	0.69%
8	Swedish	78	58	<b>48</b>	<b>40</b>	0	48	272	0.54%
9	Chinese	126	30	<b>6</b>	<b>10</b>	0	24	196	0.39%
10	Netherlandish	85	59	<b>26</b>	<b>8</b>	0	0	178	0.35%
11	Czech	60	43	<b>20</b>	<b>15</b>	6	2	146	0.29%
12	Arabic	0	0	<b>0</b>	<b>0</b>	0	76	76	0.15%
13	Finnish	40	20	<b>5</b>	<b>0</b>	0	0	65	0.13%
14	Dannish	35	15	<b>5</b>	<b>0</b>	0	0	55	0.11%
15	Japanese	0	0	<b>0</b>	<b>0</b>	0	53	53	0.10%
16	Hungarian	0	0	<b>0</b>	<b>0</b>	0	50	50	0.10%
17	Turkish	0	0	<b>0</b>	<b>0</b>	0	37	37	0.07%
18	Greek	30	0	<b>0</b>	<b>0</b>	0	0	30	0.06%
19	Romanian	0	0	<b>0</b>	<b>0</b>	0	25	25	0.05%
20	Lithuanian	5	6	<b>0</b>	<b>0</b>	0	0	11	0.02%

## 4.8. Foreign languages – students' self-assessment

### Students' opinions about their own language competences



### Self-assessment of strengths and weaknesses of one's own language competences



## 5.1. Balance of competences 2015: conclusions

**The tourism sector is of great importance for the development of the city** and impacts the situation of many other sectors of the industry.

**Transport and logistics** belong neither to the largest nor the most dynamic sectors in Kraków; however, due to its unique transport location, rich traditions and investment plans, **Kraków seems to offer unique opportunities for the development of the sector within the next five years.**

Employers in the **tourism sector are very optimistic, while employers in the transport and logistics sector are moderately optimistic about the development perspectives and declare an increase in the dynamics of creating new jobs** for graduates.

Results of the former editions of the “Balance of competences” have been confirmed once again – **employers consider soft skills to be of high importance**, among others, communication or team work, attitudes, eg **integrity and loyalty** . **English** is the key competence in the tourism sector, while additionally **German** in **transport and logistics**.

**Employers consider the most important specialist (professional) competences to be:**

- In the tourism sector: customer focus, calculations and settlements, cooperation with service providers, IT programmes, comparison of offers/searching for information, preparation of offers/tourist programmes and contracts and documentation.
- In the transport and logistics sector: transport, designing of processes in logistics, geography of Europe, customs law, budgeting principles, international trade, organization of warehouses and ERP software.

## 5.2. Balance of competences 2015: conclusions

Similarly as in previous years, the results suggest that universities are **much better in teaching technical and specialist competences than soft or business skills.**

**The cooperation between business and education in both sectors is not systematic** – the readiness to take up such a cooperation is also diversified, although the majority of entrepreneurs declare in both cases that they are ready to engage more actively in the elaboration of curricula (Programme Boards) and the performance of apprenticeships. As results from the opinions of universities' representatives, such declarations were not followed by concrete actions in the past.

**The number of graduates of universities is not a problem in both sectors, while the quality of the vast majority of them is a challenge.** In particular, the above refers to such skills, as **initiative/innovativeness, sales and customer focus** (in the tourism sector) and **taking care of quality/ conscientiousness, transport, initiative/innovativeness, knowledge about sectors and new trends** (in transport and logistics). Universities agree with such a diagnosis, while pointing out a very diversified level of motivation among the very students.

The lack of available highly qualified managers/experts is noticeable in the tourism sector.

In the context of recruiting employees, both sectors are under a strong pressure of other sectors. **The main “competitor” for the tourism sector in recruiting employees is the business services sector (BPO/SSC).** In the transport and logistics sector, cities in Lesser Poland, Silesia and abroad have to compete for employees.

### 5.3. Balance of competences 2015: conclusions

One of the biggest competitive advantages of Kraków is the availability of a large number of students and graduates speaking foreign languages.

An additional advantage of the city is its cultural and entertainment offer and tourist nature – it motivates citizens to improve their language competences, as well as enables companies to attract employees from abroad.

Language competences, although important in the majority of analysed sectors, are of particular importance from the point of view of the development of the business services sector. The dynamics of the development of this sector creates also some challenges for the education – at the general level, the significance of the knowledge of foreign languages increases, but the demand may fluctuate significantly due to new projects and companies (eg the opening of only one big company increased the demand for German several times).

Among all job advertisements, no less than 75% of them required candidates to know a foreign language, or it was treated as an additional asset. Nearly 98% of job offers in the BPO/SSC sector require candidates to know a foreign language.

English is still the most important foreign language, but it is required to combine it with another language more and more often (eg German, French, Italian or Spanish). The knowledge of English ceases to be a candidate's asset and becomes a compulsory requirement.

Business increases its demand in terms of proficiency in foreign languages quite visibly, which is particularly visible in the case of English (expectations at the C1 level are becoming dominant). In the educational sector, English teaching at the B1 level is still over-represented.

## 5.4. Balance of competences 2015: conclusions

**Students are aware of the importance of foreign languages** and take up additional activities to a large extent to improve them (among others, additional classes at language schools, foreign travels, private tuition). However, as results from the results of the study, they slightly overvalue their skills. **Companies pay particular attention to the necessity to supplement the learning of languages with such activities as foreign travels or consumption of cultures in foreign languages**, which enable to learn a colloquial language more in depth, understand a specific slang, etc., which are of particular importance in customer service.

**Language skills must go in hand with communication skills** – this is one of the weakest points of Kraków's students and graduates, who are not always able to use the vocabulary or grammar to communicate easily in the particular language in business or in practice. High **reservations in this respect are addressed to otherwise highly rated graduates of philologies**.

In terms of **translation skills**, Kraków' companies decide to employ *native speakers* more and more often.

**It is almost impossible to achieve a full balance between the demand and supply of language competences** (due to the above mentioned dynamics), but **promotional activities to improve one's own language competences should be continued**. As history shows, the educational market has quite big opportunities to adapt, as exemplified by Netherlandish (very scarce a few years ago, quite sustainable nowadays). At the moment, Russian has become much more available on the market due to migration from the eastern border, while German is slightly more difficult to gain on the labour market.

A challenge Kraków is to face shortly is **the implementation of more complex tasks in BPO/SSC centres**, which will require greater fluency in foreign languages and their combination with other competences.

## 5.5. More in full reports...

**Basic facts about each of the sectors.**

Complete list of **competences and educational results** together with definitions.

**Detailed data** about each of the analysed competences, incl.:

- current importance,
- importance in 5 years,
- recruitment difficulty,
- achieved teaching results,
- supply of and demand for language competences.

**List of positions** which are usually suitable for graduates.

**List of subjects/fields of study** enumerated as the best adapted to the sector's expectations.

**Description of results, conclusions and recommendations.**