



Training for Careers in Sustainable Tourism

TECHNICAL FINAL REPORT

April 15th, 2015

**STUDY ON
TECHNICAL
AND
VOCATIONAL
EDUCATION
AND
TRAINING
(TVET) IN
TOURISM IN
THE
GREATER
CARIBBEAN**

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This project is an initiative of the Association of Caribbean States (ACS) in collaboration with the French Development Agency (AFD), and is designed as a proactive approach to produce documentation and provide recommendations for strategies and procedures to strengthen human resource capacities in cross-cutting areas necessary for a sustainable and competitive regional tourism industry.



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EDITORIAL NOTE:

Documents that are part of this study on "Technical and Vocational Education and Training (TVET) for tourism in the Greater Caribbean" were made between October 2014 and April 2015, on the basis of various documents made under the auspices of national, regional and international organizations since the themes, which form the central part of this consultancy, have been addressed extensively for more than fifteen years. Used as reference documents and dating from 1995 to 2015, those are the work of professionals of various nationalities.

When these authors are cited in our texts, it means having used the style of writing, vocabulary and terminology used originally; so, there is not a precise or rigorous homogeneity in the texts that make up this study with respect to the use of the languages (Spanish, English and French).

Additionally, the final documents that compose this study were originally written in, either French, or Spanish or English. The translations of these documents are free-lance translations.

TECHNICAL TEAM

In October 2014, CERTIFICA was commissioned by the Association of Caribbean States (ACS) to undertake a Study on Technical and Vocational Education and Training (TVET) in tourism within the Greater Caribbean, with the support of the French Development Agency (AFD, for its French acronym).

CERTIFICA designated a team of four specialist professionals and three support professionals that for six months were dedicated, among other activities for this project, to collect the education and training offer for tourism within the region, in order to develop the Tourism and Hospitality Technical and Vocational Education and Training Catalogue of the Greater Caribbean.

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María Damaris Chaves Garita, French-Speaking Countries Researcher	Responsible to lead the data and information collection related to TVET in the Overseas Territories, release interviews with local stakeholders and build the Case Study of Guadeloupe for the Associated Members Sub-region.

Stephanie Simion, French-Speaking Countries co-researcher and French Translator	Support in the data collection and information for the Overseas Territories and follow up to key stakeholders, and translate from Spanish to French, the first part of the Final Report of the Project, the TVET Regional Framework Proposal for the Greater Caribbean and compile the tourism education and training offer of the French speaking countries.
Claire Dallies, Ecotourism Expert and Juan Arturo Sánchez, both French Translators	Translate from English to French the second part of the Final Report, the TVET Glossary and the introduction of this catalogue.
Claudia María Calderón, Technical Assistant	Provide assistance in organizing data, follow-up on questionnaires and set-up interviews; as well as in collect information.

TABLE OF CONTENTS

I.	List of Abbreviations and Acronyms	3
II.	Introduction	5
A.	Project Background	5
B.	Definition of Technical and Vocational Education and Training (TVET).....	6
C.	TVET Interventions	8
D.	Levels of Qualifications and Related Competences	11
E.	Overview of the Greater Caribbean	12
1.	Tourism Statistics.....	13
2.	Competitiveness	15
3.	The Travel & Tourism Competitiveness Index	16
4.	Organization and availability of TVET	19
5.	Economic, educational and tourism statistics and index.....	21
III.	Scope of Work	24
IV.	Objectives of the Project	25
A.	Overall Objective	25
B.	Specific Project Objectives.....	25
V.	Methodology Applied in Data Collection.....	26
A.	Research Strategy	26
B.	Selection Criteria	27
C.	Networks	27
D.	Personal contacts	28
E.	On-line surveys	35
VI.	Survey Results	36
A.	Data collection and Analysis.....	36
B.	On-line surveys for TVET providers.....	38
1.	Priorities of TVET for tourism.....	39
2.	Needs of TVET for tourism	39
3.	Challenges of TVET for tourism	40
4.	Opportunities of TVET for tourism.....	40
C.	On-line surveys for government representatives	40

1. Priorities.....	44
2. Needs.....	45
3. Challenges.....	45
D. Formal, non-formal and informal technical and vocational education and training offer for Tourism in the Greater Caribbean.....	46
E. Gap Analysis	48
1. Occupations and Skills Needs	49
2. The concept of learning	50
3. Skill levels	51
4. Legislation.....	51
5. Existing training initiatives.....	52
6. Delivery of training initiatives.....	52
7. Financing and sustainability of training programs	53
8. Curriculum and training content.....	54
9. Supply and demand	54
F. Cross analysis of Case Studies.....	54
1. Innovation	55
2. Relevance	55
3. Transferability.....	56
4. Impact.....	56
5. Sustainability	56
VII. Key findings	57
A. About the concept of TVET	57
B. About the TVET for the tourism industry.....	57
C. About the participation of stakeholders.....	58
D. About TVET intervention model	58
VIII. Recommendations.....	60
IX. Bibliography	61
X. Sources of Statistical Information.....	61
XI. Web networks	62

I. List of Abbreviations and Acronyms

The following list contains the most common abbreviations used in the technical and vocational education and training theme and related aspects, as well as the acronyms of the organizations referred and mentioned in this report. It is not intended to be a complete list of abbreviations and acronyms that might be encountered within the Greater Caribbean Region. For the original Spanish and French names, we translated to English, but using the official Spanish or French acronyms.

Agence Française de Développement (French Development Agency)	AFD
Asociación de Investigación y Estudios Sociales (Research Association and Social Studies)	ASIES
Association of Caribbean States – Asociación de Estados del Caribe	ACS - AEC
Career and Technical Education	CTE
Caribbean Tourism Organization	CTO
Competency-Based Education	CBE
Competency-Based Education and Training	CBET
Educación y Formación Técnica y Profesional	EFTP (TVET in Spanish)
Education Management Information System	EMIS
Fundación para el Desarrollo de Guatemala (Guatemalan Development Foundation)	FUNDESA
Greeing Technical and Vocational Education and Training	GTVET
Iberoamerican General Secretariat, World Tourism Organization	SEGIB/OMT (for its Spanish acronym)
Instituto Centroamericano de Administración de Empresas (Central America Business School)	INCAE
Instituto Técnico de Capacitación y Productividad (Technical Institute for Training and Productivity)	INTECAP
Centro Interamericano de Formación (Inter-American Centre for Knowledge Development in Vocational Training)	CINTERFOR
Inter-American Development Bank	IADB
International Labour Organization	ILO
Latin America and the Caribbean	LAC
Instituto Nacional de Aprendizaje (Learning National Institute)	INA
Micro, Small, and Medium Enterprises	MSME's
National Occupational Skills Standards	NOSS
National Qualification Framework	NQF
Occupational Education	OE
On-the-job training	OJT

Organization of American States	OAS
Qualification Framework	QF
Qualification System	QS
Quality Assurance Process	QAP
Regional Qualification Framework	RQF
Secretaría de Integración Turística Centroamericana (Central America Tourism Integration Secretariat)	SITCA
Sustainable Tourism Work Program	STWP
Technical and Vocational Education and Training	TVET
Technical Education	TE
Technical Vocational Education	TVE
Territoires d'outre-mer (French Overseas Territories)	TDM (for its French acronym)
Tourism National Agency	TNA
Training and Capacity Building	TCT
Training Needs Assessment	TNA
Travel and Tourism	T&T
Travel and Tourism Competitiveness Index	TTCI
United Nations Education, Scientific and Cultural Organization	UNESCO
United Nations Education, Scientific and Cultural Organization - International Centre for Technical and Vocational Education and Training	UNESCO-UNEVOC
United Nations World Tourism Organization	UN-WTO
Vocational Education and Training	VET
Workforce Education	WE
Workplace education	WPE
World Economic Forum	WEF
World Travel and Tourism Council	WTTC

II. Introduction

This report focuses on the activities carried-out by CERTIFICA during the six months of execution of the “Training for Careers in Sustainable Tourism” project regarding the research and identification of the technical and professional institutions offering tourism courses, training and educational programs for tourism, as well as it includes a summarized financial report.

The report outlines activities conducted from December 2014 to April 2015 and, summarizes the main findings. The achievement of the projects objectives is assessed against the approved Work Plan. This report is a synthesis of the outcomes/documents produced during the consultancy:

1. Tourism and hospitality TVET catalogue: A compendium of the formal, non-formal and informal training offer in the Greater Caribbean.
2. 8 TVET Case Studies
 - a. CARICOM: Barbados, Jamaica and The Bahamas
 - b. Central America: Costa Rica and Guatemala
 - c. G3: Mexico
 - d. Non Grouped: Dominican Republic
 - e. Associated Members: Guadeloupe
3. Gap Analysis
4. TVET for Tourism Regional Framework Proposal

A. Project Background

Tourism is a major competitive industry at the Greater Caribbean region (the largest growth industry in the region), recognized for generating foreign exchange, being a major activator of micro, small and medium size businesses, and a great employment generator. On a global level, tourism is the world’s fastest growing sector and the UN-WTO statistics and predictions prove to continue on this path; together with telecommunication and information technology, international experts predicted that tourism could become one of the three key industries leading the service economies.

The tourism is a service industry and is naturally linked to the human factor, in both ways, as providers as well as consumers. People are the immediate consumers of the tourism product and the extent of their experience affects the human interaction at the destination, accommodation or service facility. The global tourism significant growth, than has been outstanding after three decades of increment in tourist arrivals and foreign exchange earnings, the prospects for continuing growth and the fact that it is essential to the economies of the

Caribbean islands and in-land countries, has given rise to the issue of the development of human resources in various areas in order to achieve a successful and competitive economic sector.

The development of human resources correlates to tourism related jobs and careers, industry restructuring, organizational reengineering and quality concepts (in terms of service provided to the guest and quality of work for the employee) are, rapidly changing the workplace “map”. Information technologies are also transforming the travel and tourism industry requiring not only more highly skilled workers but more competent ones.

Increasingly, all tourism operators are understanding the importance of providing cross training for their employees, to empower them with multiple-skills and labour competences. The lack of skilled workers in the industry at all levels has been cited by Regional Agencies, including the Caribbean Tourism Organization (CTO) and the Central American Tourism Integration Secretariat (SITCA), as a weakness and one of the factors contributing to the increasing loss in revenue and tourist arrivals to the Region’s touristic destinations. Therefore, positive impacts on employment rates and more generally on the competitiveness of the ‘Country Brand’ and the ‘Regional Brand’ will depend on the skill level, competency, and professionalism of the workforce.

B. Definition of Technical and Vocational Education and Training (TVET)

There is no universally accepted definition of technical and vocational education and training (TVET). As a field, it is continually changing, usually in response to the demands made upon it (Mclean & Wilson, 2009). According to UNESCO, Technical and Vocational Education and Training (TVET) is used as a comprehensive term referring to those aspects of the educational process involving, in addition to general education, the acquisition of practical skills, attitudes, understanding and knowledge relating to occupations in various sectors of economic and social life.¹ In other words, TVET is concerned with the acquisition of knowledge, skills and attitude for the world of work.

In this broad definition, TVET refers to a range of learning experiences, which are relevant to the world of work. The learning experiences may occur in a variety of learning contexts, including educational institutions and work places. There are vast differences between the different systems of TVET and their social contexts. In addition, the increasingly complex demands of globalization and the social and economic changes have significant implications for TVET.²

The field of Technical and Vocational Education and Training (TVET) requires both definition and differentiation from other designations. Throughout the course of history, various terms have been used to describe elements of the field that are now conceived as comprising TVET. These include: Apprenticeship Training, Vocational Education, Technical Education, Technical

¹ UNESCO, Revised recommendation concerning technical and vocational education (2011)

Vocational Education (TVE), Occupational Education (OE), Vocational Education and Training (VET), Career and Technical Education (CTE), Workforce Education (WE), Workplace Education (WE) etc. Several of these terms are commonly used in specific geographic areas.²

A great diversity of TVET models can be found worldwide. Various terms are used to describe the diverse elements of the field that are now conceived as comprising TVET, many of them specific to particular geographical areas (for example, in the United States the current term is “career and technical education”)³. Furthermore, the organization of TVET varies widely, both between and within countries. With no internationally accepted set of definitions of the different types that can be distinguished, the following definitions have been used for the purpose of this study:

Technical education: theoretical vocational preparation of students for jobs involving applied science and modern technology; compared to vocational education (which focuses on the actual attainment of proficiency in manual skills), technical education emphasizes the understanding of basic principles of science and mathematics and their practical applications; usually delivered at upper-secondary and lower-tertiary levels to prepare students for occupations that are classified above the skilled crafts but below the scientific or engineering professions (although diploma- and degree-level courses also exist).

Vocational education: organized activities designed to bring about learning as preparation for jobs in designated (manual or practical) trades or occupations; traditionally non-theoretical and focused on the actual attainment of proficiency in manual skills; usually considered part of the formal education system and thereby falling under responsibility of the Ministry/Department of Education.

Vocational training: prepares learners for jobs that are related to a specific trade or occupation; but, compared to vocational education, is better linked to the labour market and employment development system, and therefore usually falls under the responsibility of the Ministry/Department of Labour.

On-the-job training: workplace-based training that uses real jobs as a basis for instruction and for practical purposes.

Apprenticeship training: combines on-the-job training for highly skilled craft or trade (received from someone who is already a skilled leader in the field) with academic/theoretical instruction; ranges from informal work-based learning by doing to formal structured programs sponsored by large industrial firms.

² UNESCO-UNEVOC. What is TVET: <http://www.unevoc.unesco.org/go.php?q=What+is+TVET&context=>

³ Technical and Vocational Education and Training (TVET) Interventions to Improve Employability and Employment of Young People in Low-and Middle-Income Countries. Janice Tripney, Jorge Hombrados, Mark Newman, et al. September 2013

TVET also refers to deliberate interventions to bring about learning which would make people more productive (or simply adequately productive) in designated areas of economic activity (e.g., economic sectors, occupations, specific work tasks). This is the distinctive purpose of TVET.

TVET refers to education and training that prepares people for an employment and makes them more productive in various economic fields⁴. TVET enhance human potential and diversifies people's choices in order to promote self-employment and entrepreneurship development.

The most challenging task of TVET is to produce the right type of skilled workforce who is able to match the need of the market demand in a timely manner. Yet, the main objective of TVET is to train youths and adults alike, readying them for labour market.

TVET is a complex and multi-dimensional field. It includes both secondary and tertiary level education, as well as technical and vocational training institutions that are the locus of middle-level technical worker training.

The rapid changing in labour markets, influenced by technology and changes in demography (climate and immigration); require people with adaptable skills to the changing nature of work and to new emerging jobs (virtual offices and BPOs for example).

C. TVET Interventions

Employability refers to a person's capability of gaining initial employment, maintaining employment (including the ability to make transitions between jobs and roles within the same organization to meet new job requirements) and/or obtaining new employment if required.⁵ It is therefore a concept that can be applied to both employed people seeking alternative jobs or promotion and unemployed people seeking work.

The concept of employability has become a cornerstone of labour market policies and employment strategies internationally, with many policymakers viewing the development of individual employability as a crucial step towards improving access to employment and as a means of offering workers the opportunity to develop the skills allowing self-sufficiency within the labour market. There is increasing recognition that employability is dependent not only on individual characteristics but also the environmental, social, and economic context in which work is sought.

⁴ Curriculum Development in Vocational and Technical Education: Planning, Content, and Implementation. Curtis R. Finch, John R. Crunkilton (1999).

⁵ Employability: Developing a Framework for Policy. Hillage & Pollard, 1998

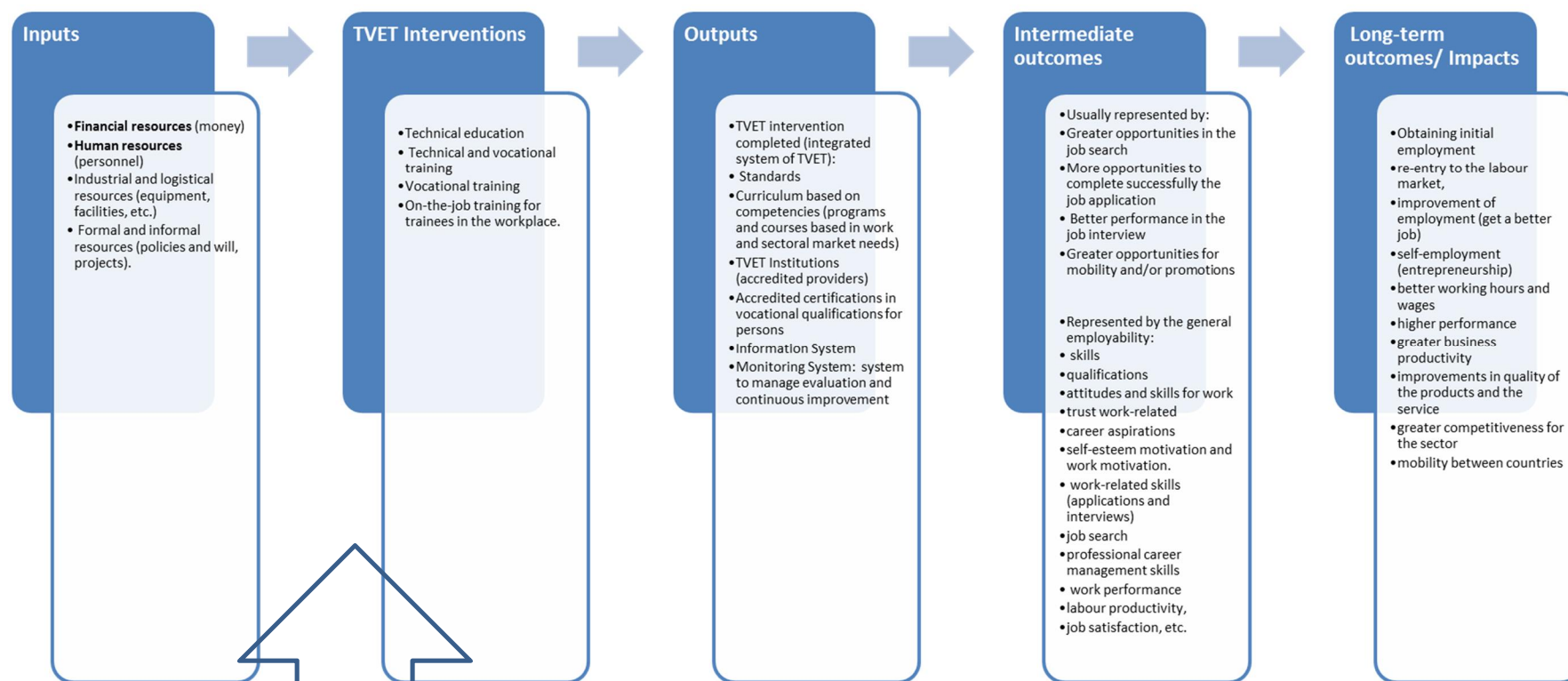
The following logic model⁶ provides a very simple representation of the relationships among (a) the resources that are invested (b) the activities that take place and (c) the benefits or changes that result as a sequence of events:

Characteristics of participants in TVET model: age, sex, disability, ethnic origin, and mastery of the language used by the model, etc.

Characteristics of interventions: the type of model for TVET intervention, i.e. If it is referred i) to improve employment rates, ii) to lead to higher productivity and better performance of the current workforce, iii) to facilitate the inclusion to the labour market for vulnerable populations (women, young people, people with physical, mental or emotional disabilities, rural or low-income population) and its comprehensiveness, duration/frequency, iv) if it is driven by supply and demand of the market, etc.

Broader context/ external factors: characteristics of the Community (for example, from the neighbourhood where it is being applied), high or low rates of national unemployment, political commitment, the importance of tourism and hospitality in the country or region, among others.

⁶ www.campbellcollaboration.org . Consulted on March, 2015.



Underlying assumptions:

Outcomes may be influenced by factors such as:

- Participant characteristics: age, gender, disability, ethnicity, etc.
- Interventions characteristics: TVET model intervention, duration/frequency, demand-supply driven, etc.
- Broader context/external factors: community characteristics (e.g. neighborhood), high or low national unemployment rate, political commitment, importance of the tourism and hospitality sector, etc.)

All interventions will have positive and negative impacts, both of which were taken into account for the regional framework proposal. A key question concerning labour market interventions, including those offering TVET opportunities is whether job creation is additional or not. It is important to take into consideration that even if it found to be effective, the TVET intervention may not generate any additional employment; it may only be affecting who gets employed, not the level of employment. It is recognized that determining the “*additionality*” of any employment effects is methodologically very challenging.

Although there is growing consensus that TVET is important for economic growth and social cohesion, it is still not clear who should fund, provide, and regulate it, or who should take it. Collecting evidence from studies that have analysed these issues is crucial for purposes of policy making. Since most of the studies, surveys and reviews are not focused on the tourism and hospitality industry.

D. Levels of Qualifications and Related Competences

A Qualifications Framework (QF) is an instrument for the development, classification and recognition of skills, knowledge and competencies along a continuum of agreed levels. It is a way of structuring existing and new qualifications, which are defined by learning outcomes. The QF indicates the comparability of different qualifications and how one can progress from one level to another.⁷

The distinction between a national qualification framework (NQF) and a qualification system (QS) is important, being the first one component of the overall QS which is broader and includes all the activities that result in the recognition of learning, i.e.: policies, institutional arrangements, quality assurance processes (QAP), assessment and awarding processes, etc.

A more recent development has been the emergence of regional qualification frameworks (RQF), which covers qualifications in a number of countries in a particular geographical region, i.e. CARICOM and Central America and Dominican Republic. But given that RQF are a recent model, it is not possible to draw definitive conclusions about their design or impact. However, they appear to be significant initiatives that may influence the development of the QF's within the Greater Caribbean.

The number of levels in a national or regional qualification framework varies from 8 to 10 levels, but they include from pre-school to top-graduate studies and are referred to the whole

⁷ An Introduction to National Qualifications Frameworks: Conceptual and Practical issues for Policy Makers. International Labour Organization (2007).

Educational System. For this consultancy CERTIFICA developed a 5-level framework that is only referred to TVET and higher education programs for the tourism and hospitality industry as follows:

LEVEL	EDUCATION SECTOR			SKILLS & KNOWLEDGE
	SKILLS TRAINING	VOCATIONAL & TECHNICAL EDUCATION	HIGHER EDUCATION	
1	Free courses	Initial qualification programs Senior Secondary School		General knowledge
2		Technical and vocational education		Functional skills (front-line workers)
3		Technical and vocational education certification and diploma	Associate degree	Supervisory skills
4			Bachelor's degree	Professional qualifications (middle manager)
5			Master and Doctoral Degree	Specialist professional qualifications (executive manager / owner)

E. Overview of the Greater Caribbean

The 32 countries of the Greater Caribbean vary significantly in size and economic development. The Region includes countries like Mexico which is the second largest economy in Latin America and others like the small islands developing states. Rich in natural, history and cultural resources, the region is home to approximately 23% of the world's forest and has 6 of the world's 17 megadiverse countries. Although these resources are not evenly distributed, the overall richness and economic importance of the region's ecosystems and its natural capital are undeniable.⁸

Although tourism is one of main economic drivers for many countries in the region, is under increasing pressure from emerging markets. An increasing demand in new products areas such as adventure and cultural tourism, eco-tourism and upscale resorts provide an opportunity for the region to revitalize the mature tourism sector.⁹

⁸ UNEP, 2010

⁹ A Time to Choose: Caribbean Development in the 21st Century. The World Bank, 2012.

One of the major benefits of the development of the tourism and hospitality industry is the provision of employment. Tourism and hospitality creates direct and indirect employment in any economy. Direct employment is created in businesses such as hotels, travel agencies, tour operators, air, water, and ground transportation companies, food and beverage enterprises, and those providing goods and services directly to visitors and travellers and receiving revenues from them.

Indirect employment arises out of business which produces goods and services for businesses supplying visitors or travellers directly. The tourism and hospitality employment consists of employment in a number of diverse sectors like travel agencies, tour operators, transportation, accommodation, food and beverage, attractions, and so on, and requires a variety of occupations and skills.

According to the World Tourism Organization, by 2014 tourism industry contributes directly to 6% of the world's GDP and one in 12 jobs globally.

1. Tourism Statistics¹⁰

According to the UNWTO in 2013 the Americas (Latin America and the Caribbean) region received 5 million additional international arrivals (+3%), reaching a total of 168 million. The region had a slow start year, but growth picked up throughout the second half. International tourism receipts in the region reached US\$229 billion, an increase of 6% in real terms. The region maintained its share of worldwide arrivals at 15%, while its share of receipts was at 20%.

In Central America (+4%) all destinations reported consisted growth, with Costa Rica, El Salvador and Nicaragua (all +4%) around the average, Belize (+6%) and Honduras (+5%) grew somewhat faster and Guatemala and Panama (both +3%) slightly slower.

Colombia (+5%) posted sound results; as well as Mexico that showed 1% growth in tourist arrivals.

The Caribbean registered a modest 2% increase in arrivals; among the larger destinations Dominican Republic (+3%) saw growth above the sub regional average. Smaller destinations such as Aruba (+8%) and Curacao (+5%) reported healthy growth. After decline in 2012, Haiti reported a solid 20% increase in arrivals.

The table No. 1 is the overall region results as reported by the UN-WTO.

¹⁰ UNWTO Tourism Highlights 2014 Edition.

TABLE NO. 1

UNWTO TOURISM THE AMERICAS TOURISM HIGHLIGHTS 2014 EDITION

Destinations	Series ¹	International Tourist Arrivals							International Tourism Receipts					
		(1000)				Change (%)			Share (%)	(US\$ million)				Share (%)
		2010	2011	2012	2013*	11/10	12/11	13/12	2013*	2010	2011	2012	2013*	2013*
Americas		150,578	155,964	162,721	167,940	3.6	4.3	3.2	100	180,885	196,522	212,911	229,179	100
North America		99,517	102,130	106,404	110,091	2.6	4.2	3.5	65.6	131,284	144,255	156,360	171,044	74.6
Canada	TF	16,219	16,016	16,344	16,588	-1.3	2.0	1.5	9.9	15,829	16,834	17,407	17,656	7.7
Mexico	TF	23,290	23,403	23,403	23,734	0.5	0.0	1.4	14.1	11,992	11,869	12,739	13,619	6.0
United States	TF	60,008	62,711	66,657	69,768	4.5	6.3	4.7	41.5	103,463	115,562	126,214	130,569	60.9
Caribbean		19,539	20,117	20,730	21,229	3.0	3.0	2.4	12.8	22,785	23,409	24,201	24,828	10.8
Anguilla	TF	62	66	65	69	6.1	-1.6	6.8	0.0	99	112	113	122	0.1
Antigua, Barb	TF	230	241	247	244	5.0	2.3	-1.2	0.1	298	312	319	299	0.1
Aruba	TF	825	869	904	979	5.4	4.0	8.3	0.6	1,251	1,351	1,402	..	-
Bahamas	TF	1,370	1,346	1,422	1,363	-1.7	5.6	-4.1	0.8	2,163	2,142	2,311	..	-
Barbados	TF	532	568	536	500	6.7	-5.5	-5.2	0.3	1,034	963	907	912	0.4
Bermuda	TF	232	236	232	236	1.6	-1.7	1.8	0.1	442	466	454	437	0.2
Bt.Virgin Is	TF	330	338	351	356	2.2	4.0	1.2	0.2	389	388	307	..	-
Cayman Islands	TF	288	309	322	345	7.2	4.1	7.4	0.2	485	458	480	..	-
Cuba	TF	2,507	2,688	2,815	..	7.2	4.7	..	..	2,187	2,283	2,326	..	-
Curaçao	TF	342	390	420	440	14.2	7.6	4.8	0.3	385	453	543	..	-
Dominica	TF	77	76	78	78	-1.3	3.4	0.2	0.0	94	106	76	82	0.0
Dominican Rp	TF	4,125	4,306	4,563	4,690	4.4	5.9	2.8	2.8	4,209	4,436	4,736	5,118	2.2
Grenada	TF	110	118	112	116	7.1	-5.1	3.7	0.1	112	117	122	120	0.1
Gustadoupe	TCE	302	418	..	..	6.5	..	..	..	510	583	..	..	-
Haiti	TF	255	349	349	420	36.9	0.1	20.2	0.2	169	162	170	..	-
Jamaica	TF	1,922	1,952	1,988	2,008	1.6	1.8	1.1	1.2	2,001	2,013	2,046	..	-
Martinique	TF	476	495	487	490	3.9	-1.6	0.5	0.3	472	516	462	..	-
Montserrat	TF	6	5	7	7	-9.8	35.5	-1.5	0.0	6	5	7	8	0.0
Puerto Rico	TF	3,186	3,048	3,060	3,200	-4.3	0.7	4.3	1.9	3,211	3,143	3,193	3,334	1.5
Saint Lucia	TF	306	312	307	319	2.1	-1.8	3.9	0.2	309	321	337	354	0.2
St.Kitts-Neu	TF	98	102	104	107	3.4	2.5	2.6	0.1	90	94	95	101	0.0
St.Martin	TF	443	424	457	467	-4.2	7.6	2.3	0.3	674	719	842	..	-
St.Vincent/Grenadines	TF	72	74	74	72	1.9	0.7	-3.5	0.0	86	92	94	92	0.0
Trinidad Tob	TF	388	402	..	..	3.7	..	..	..	450	472	..	..	-
Turks/Caicos	TF	281	354	292	291	26.0	-17.6	-0.4	0.2	..	..	..	..	-
US.Virgin Is	TF	500	532	580	..	-9.8	9.1	..	..	1,013	..	..	..	-
Central America		7,908	8,256	8,860	9,192	4.4	7.3	3.7	5.5	6,627	7,787	8,723	9,380	4.1
Belize	TF	242	250	277	294	3.5	10.7	6.1	0.2	249	247	298	351	0.2
Costa Rica	TF	2,100	2,192	2,343	2,428	4.4	6.9	3.6	1.4	1,999	2,152	2,299	2,483	1.1
El Salvador	TF	1,150	1,184	1,255	1,308	3.0	5.9	4.2	0.8	390	415	558	621	0.3
Guatemala	TF	1,219	1,225	1,305	1,331	0.5	6.5	2.0	0.8	1,378	1,350	1,419	1,481	0.6
Honduras	TF	863	871	895	943	1.0	2.7	5.4	0.6	627	639	661	711	0.3
Nicaragua	TF	1,011	1,060	1,180	1,230	4.8	11.3	4.3	0.7	309	378	422	417	0.2
Panama	TF	1,324	1,473	1,606	1,658	11.2	9.1	3.2	1.0	1,676	2,605	3,067	3,316	1.4
South America		23,614	25,480	26,727	27,429	7.8	5.0	2.6	16.3	20,189	23,071	23,626	23,927	10.4
Argentina	TF	5,325	5,705	5,585	5,571	7.1	-2.1	-0.3	3.3	4,942	5,354	4,887	4,411	1.9
Bolivia	TF	807	953	1,114	..	18.0	17.0	..	..	379	481	532	..	-
Brazil	TF	5,161	5,433	5,677	..	5.3	4.5	..	..	5,702	6,555	6,645	6,711	2.9
Chile	TF	2,801	3,137	3,554	3,576	12.0	13.3	0.6	2.1	1,645	1,889	2,150	2,219	1.0
Colombia	TF	2,385	2,042	2,175	2,288	-14.4	6.5	5.2	1.4	2,083	2,201	2,354	2,491	1.1
Ecuador	VF	1,047	1,141	1,272	1,366	9.0	11.5	7.4	0.8	781	843	1,033	1,246	0.5
French Guiana	TF	..	..	..	..	..	..	..	..	..	..	..	..	-
Guyana	TF	152	157	177	..	3.3	12.6	..	..	80	95	64	..	-
Paraguay	TF	465	524	579	610	12.6	10.6	5.3	0.4	217	241	265	273	0.1
Peru	TF	2,299	2,598	2,846	3,164	13.0	9.5	11.2	1.9	2,008	2,360	2,657	3,009	1.3
Suriname	TF	204	220	240	249	7.9	8.9	3.8	0.1	61	61	71	84	0.0
Uruguay	TF	2,349	2,857	2,695	2,684	21.6	-5.7	-0.4	1.6	1,509	2,203	2,076	1,920	0.8
Venezuela	TF	526	595	710	..	13.0	19.3	..	..	740	739	844	..	-

Source: World Tourism Organization (UNWTO) ©
1 See note on page 9

(Data as collected by UNWTO May 2014)

2. Competitiveness¹¹

The world is in a period where governments realize the value of tourism and travel as a creator of jobs and a generator of growth. Yet, there is a higher expectation than ever before from consumers for affordable, accessible, convenient and sustainable travel. It is critical to envision what it will take to sustain travel growth (in excess of GDP) year over year.

It will need to consider as well, what technological advances, innovations and infrastructure are needed at the local, national, regional and global level to facilitate travel while improving security with a special interest in developing and emerging markets.

At the same time, given the move towards regionalization and the advancements of agreements among regional blocs in establishing common policies, **the international community should encourage and enhance collaboration within and across regional blocs.**

Sustainability has been identifying as a priority issue for the tourism and hospitality industry and its importance to achieve its growth targets. Indeed, sustainability is the industry's permission slip to grow. As such, the industry must be mindful of the implications of the significant forecasted increase of 31% in passenger air transport by 2017. While the economic benefits of such growth are clear, the repercussions on the environment and local communities are important to consider.¹²

The Travel & Tourism Competitiveness Index (TTCI) also identifies seven transformations that may change the business perspective of the tourism and travel industry. Three of them are related with human resource development and employability:

1. **Increasing difficulties in attracting top talent.** Research shows that for every 30 new tourists to a destination, one new job is created. **The aviation and travel sector is already the second-largest employer in the world, with huge potential for further job creation**—travel and tourism is forecast to employ 338 million people by 2023, and aviation and aerospace an additional 58 million people. Yet **the industry has difficulties in attracting top talent, both for technical and managerial positions.** According to the WTTC, **the total global impact of talent gaps could cost the global economy nearly 14 million jobs and \$630 billion GDP loss**, with China, Italy, Japan, Russia and the United States suffering most. **The public and private sector need to collaborate closely to update university and**

¹¹ Travel and Tourism Competitiveness Index 2015 Edition. World Economic Forum

¹² The Travel & Tourism Competitiveness Index 2015: T&T as a Resilient Contribution to National Development. World Economic Forum

training programs to ensure they keep up with market needs and technological advancements.

2. Changes in the composition of tourist demand will define business strategies. As described above, **the industry will need to deeply understand and cater their product offerings to the needs of new travellers** (such as millennials and the new middle classes coming from emerging countries) and segments where demand is growing (such as senior travellers) **to capitalize on shifting demographics.**
3. **New technologies and innovations are revolutionizing the industry**, such as GPS-enabled smartphones and growing trust in online transactions, are reshaping parts of the travel industry and requiring businesses to rethink how to deliver services. **There is also a growing need for the public sector to redefine regulatory frameworks in response to the rise of the sharing economy**—people are letting out their property as and when it suits them, acting as an ad hoc taxi service and even starting to crowd-source charter flights. The consumer peer-to-peer rental market is worth an estimated \$26 billion, with Airbnb alone having more than 600,000 listings across 160 countries.

3. The Travel & Tourism Competitiveness Index¹³

This section presents the detailed rankings and scores of the 14 pillars composing the T&T Competitiveness Index 2015 for the Greater Caribbean countries covered this year by the Economic Forum survey.

In the Caribbean, common T&T issues include further leveraging of natural and cultural resources and air transport infrastructure, and—with some exceptions—improving the capacity for connectivity. The T&T Competitiveness Index suggests that most Caribbean economies rely extensively on their famous beaches but do not seem to sufficiently promote their cultural resources. More efforts in promoting and leveraging their cultural heritage could further improve the T&T competitiveness of these economies, while the lower than expected performance of Caribbean countries on the Natural Resources pillar is partly explained by a lack of UNESCO natural heritage sites and a low percentage of land being officially protected.

In terms of infrastructure, given the region's geography (The Americas) it is understandable that most countries have prioritized air transport. However, underdeveloped ground transport undermines the economic effect of investments in air infrastructure by limiting the ability to move people across and within countries. Public-private partnerships (PPP) are rapidly becoming an important mode of delivery of projects in Latin America, leveraging the often limited public funds allocated to T&T

¹³ <http://reports.weforum.org/travel-and-tourism-competitiveness-report-2015/executive-summary/>

infrastructure development. In many cases, the same business environment constraints that limit the formation of new companies in the T&T sector—such as red tape, insufficient property rights protection and corruption—can also weaken the effectiveness of PPP projects.

Mexico is ranked 30th overall, 4th for the Americas region, but number 1 for the Greater Caribbean. Endowed with both natural (4th) and cultural (11th) resources, Mexico ranks 8th and 6th, respectively, in terms of natural and cultural UNESCO World Heritage sites. Digital demand data confirms the importance of natural tourism, with Mexico ranking 18th worldwide for online searches. Another area of strength is the relatively high prioritization of the T&T industry in the country's development strategy (32nd), with approximately 5% of the national budget spent on T&T related activities (43rd globally) and the Pacific Alliance emphasizing international openness and regional integration. Despite this strong overall performance, some areas for improvement remain, notably safety and security (125th) and environmental sustainability (126th), which is strategically significant given the importance of the country's natural resources. Additionally, some areas of the business environment could be improved—Mexico ranks low on costs related to construction permits (131st), market competition (114th) and taxation levels (116th).

Panama is ranked 33rd overall, 5th in The Americas, and 2nd for the Greater Caribbean. The country has developed a significant tourism sector (approximately 6% of the economy) on the basis of its rich natural resources (20th) and world-class tourist service infrastructure (27th), which offer tourists an enjoyable experience. Panama is a price-competitive destination (32nd), internationally open (23rd) and well connected thanks to its excellent air transport infrastructure (18th), which allows it to position itself as a travel and trade gateway to Latin America. There are nonetheless aspects where Panama could improve. In terms of human resources (95th), despite the progress made, it is not always easy to find skilled workers (99th), perhaps due to regulatory barriers to sourcing from the international talent pool (111th) and the limited participation of women in the labour force (112th). In terms of cultural resources (63rd), Panama scores relatively low on the amount of culture and entertainment-related online searches (47th) and could expand its entertainment offer, including by better promoting its oral and intangible heritage.

Colombia is 68th globally, 12th regionally (The Americas), and 4th for the Greater Caribbean; with 2.3 million international tourist arrivals—on an upward trajectory since 2011. It is very open internationally (8th), with one of the most liberal visa policies (20th), and it has improved its ICT readiness (67th) over time. Colombia has a highly biodiverse ecosystem, home to almost 3,000 species (2nd), and a vibrant cultural atmosphere, with music and folklore events, such as the Carnival of Barranquilla, which sustain the oral

and intangible cultural heritage (13th). Yet, despite recent improvements in some areas of the country, traveller safety concerns drive Colombia into low ranks in safety and security (140st), including terrorism (134th) and crime and violence (132nd). Other areas for improvement include ground infrastructure (124th), with a need for more paved roads, and an increase in government budget allocation to T&T related expenditure (110th).

Costa Rica and Barbados lost some positions both in the regional and global rank; but still are some of the strongest in the region and both are leading the Central America and CARICOM sub-regions.

TABLE NO. 2
THE TRAVEL AND COMPETITIVENESS INDEX 2015: THE AMERICAS¹⁴

Country/Economy	ETCI INDEX		Enabling Environment Pillars, values				
	Regional rank	Global rank	Business Environment	Safety and Security	Health and Hygiene	Human Resources and Labour Market	ICT Readiness
NORTH AMERICA AND CARIBBEAN							
United States	1	4	5.28	5.33	5.70	5.28	5.76
Canada	2	10	5.34	6.05	5.60	5.33	5.38
Mexico	4	30	4.29	4.10	5.25	4.45	3.82
Panama	5	34	4.88	5.03	5.09	4.23	4.30
Costa Rica	6	42	4.64	5.58	5.00	4.79	4.16
Barbados	7	46	4.82	5.75	6.02	4.88	4.97
Puerto Rico	9	55	4.85	4.82	5.77	4.44	3.76
Trinidad and Tobago	13	69	4.53	4.10	5.14	4.39	4.52
Jamaica	15	76	4.44	3.85	4.66	4.81	3.73
Guatemala	16	80	4.23	3.57	4.69	4.39	3.80
Dominican Republic	17	81	4.19	4.50	4.89	4.21	3.48
Honduras	18	90	4.09	3.64	4.52	4.25	3.10
El Salvador	19	91	4.22	3.82	4.86	4.26	3.69
Nicaragua	20	92	3.53	5.14	4.32	4.07	3.21
Haiti	26	133	3.02	4.75	3.74	3.76	1.84
North America and Caribbean average			4.48	4.64	5.02	4.49	3.97
North America and Caribbean standard deviation			0.81	0.82	0.60	0.43	0.96
SOUTH AMERICA							
Brazil	3	28	3.89	4.66	5.31	4.51	4.43
Chile	8	51	5.03	5.96	5.18	4.66	4.62
Argentina	10	57	3.87	5.03	6.20	4.20	4.16
Peru	11	58	4.29	4.40	4.79	4.57	3.62
Colombia	12	68	3.84	3.82	4.97	4.44	4.17
Uruguay	14	75	4.58	5.48	5.76	4.50	4.94
Bolivia	21	100	3.43	4.05	4.38	4.05	3.42
Suriname	22	101	3.88	5.61	5.09	3.95	3.78
Guyana	23	104	4.43	4.57	4.52	3.88	3.04
Venezuela	24	110	2.36	3.36	5.08	3.86	3.46
Paraguay	25	113	4.18	4.62	4.99	3.89	3.33
South America average			3.84	4.65	5.12	4.31	3.91
South America standard deviation			0.80	0.92	0.55	0.54	0.60
The Americas average			4.15	4.84	5.08	4.37	3.94
Best performance (global)			6.13	6.70	6.97	5.61	6.37

¹⁴ The Travel and Tourism Competitiveness Report 2015. World Economic Forum. <http://reports.weforum.org/travel-and-tourism-competitiveness-report-2015/index-results-the-travel-tourism-competitiveness-index-ranking-2015/>. Consulted on March, 2015.

Four key findings emerge from the results of the 2015 TTCI and additional quantitative and qualitative analysis.

- First, the T&T industry continues to grow quickly, and has proven resilient to shocks.
- Second, new trends are emerging, and the countries performing better in the TTCI are those that are better equipped to capture the opportunities they bring.
- Third, developing the T&T sector provides growth opportunities for all countries, regardless of their wealth, and offers job opportunities at all skill levels.
- Fourth, the development of the T&T industry is complex, requiring inter-ministerial coordination, and often international and public-private partnerships.

These findings are also partially echoed by the recent work by the Global Agenda Council on the Future of Travel & Tourism.¹⁵

4. Organization and availability of TVET¹⁶

According to national education laws the denomination of TVET is quite varied in the region:

- Technical Vocational Education (Educación Técnico-Profesional) (Argentina and the Dominican Republic).
- Secondary Technical Education and Vocational Training (Educación Secundaria Técnica y Formación Profesional) (Aruba).
- Technical Career Education (Educación Técnica Profesional) (Costa Rica).
- Technical Education and Vocational Training (Educación Técnica Vocacional y Formación Profesional) (El Salvador).
- Vocational and Technical Education (Educación Técnica y Vocacional) (Suriname).

In the remaining countries it is called Educación y Formación Técnica y Profesional (EFTP), or Technical and Vocational Education and Training (TVET) in Anglophone nations. While the names are different, the definitions set forth are similar.

COUNTRY	DENOMINATION OF TVET
Antigua and Barbuda	Technical and Vocational Education and Training
Aruba	Secondary Technical Education and Vocational Training
Bahamas	Technical and Vocational Education and Training
Barbados	Technical and Vocational Education and Training
Belize	Technical and Vocational Education and Training
Colombia	<i>Formación Profesional</i> (Vocational Education)

¹⁵ <http://reports.weforum.org/travel-and-tourism-competitiveness-report-2015/executive-summary/>

¹⁶ Status Report on the Education Management Information Systems (EMIS) of Technical and Vocational Education and Training (TVET) in 12 countries in Latin America and the Caribbean. UNESCO Regional Bureau of Education for Latin America and the Caribbean (ORELAC/UNESCO), Federico Meijer. 2013.

COUNTRY	DENOMINATION OF TVET
Costa Rica	<i>Educación Técnica Profesional</i> (Technical and Vocational Education)
Curacao	Secondary Technical Education and Vocational Training
Dominica	Technical and Vocational Education and Training
Dominican Republic	<i>Educación Técnico-Profesional</i> (Technical and Vocational Education)
El Salvador	<i>Educación Técnica Vocacional y Formación Profesional</i> (Technical Vocational Education and Professional Training)
French Guyana	<i>l'Enseignement et la Formation Techniques et Professionnels</i> (Technical Vocational Education and Training)
Grenada	Technical and Vocational Education and Training
Guadeloupe	<i>l'Enseignement et la Formation Techniques et Professionnels</i> (Technical Vocational Education and Training)
Guatemala	<i>Educación Técnica y Formación Profesional</i> (Technical Education and Vocational Training)
Guyana	Technical and Vocational Education and Training
Haiti	<i>Formation Techniques et Professionnels</i> (Technical and Vocational Education)
Honduras	<i>Educación Técnica y Formación Profesional</i> (Technical Education and Vocational Training)
Jamaica	Technical and Vocational Education and Training
Martinique	<i>l'Enseignement et la Formation Techniques et Professionnels</i> (Technical Vocational Education and Training)
Mexico	<i>Educación Técnica y Formación Profesional</i> (Technical Education and Vocational Training)
Nicaragua	<i>Formación Técnica y Educación Profesional</i> (Technical Education and Vocational Training)
Panama	<i>Educación Técnica y Profesional</i> (Technical and Vocational Education)
Saint Lucia	Technical and Vocational Education and Training
Saint Martin	<i>l'Enseignement et la Formation Techniques et Professionnels</i> (Technical Vocational Education and Training)
Sint Maarten	Secondary Technical Education and Vocational Training
Saint Kitts and Nevis	Technical and Vocational Education and Training
Saint Vincent and the Grenadines	Technical and Vocational Education and Training
Suriname	Secondary Technical Education and Vocational Training
Trinidad and Tobago	Technical and Vocational Education and Training
Venezuela	<i>Educación Técnica y Formación Profesional</i> (Technical Education and Vocational Training)

5. Economic, educational and tourism statistics and index

Employability in tourism within the region is very variable; Aruba has the highest rate (90.8%), followed by a medium-high dependence in Antigua and Barbuda (53%), Saint Lucia (44.1%), Barbados (35.7%), and Belize (35.3%). At a medium-low importance in Jamaica (24.7%), St. Kitts & Nevis (24.2%), Dominica (24%), Grenada (22.1%), Dominican Republic (14.7%).

In regards to the GDP for tourism Aruba again has the highest percentage (88.4%), followed by Antigua and Barbuda (58.3%), The Bahamas (43.6%), Saint Lucia (39.5%), Belize (39.2%), Dominica (26.4%), St. Kitts & Nevis (25.5%), Grenada (24.2%), and St. Vincent and the Grenadines (19.9%).

COUNTRY	TOTAL POPULATION	Literacy rate (population over 15 years old)	Enrolment in TVET as% of enrolment in secondary education			TERTIARY / UNIVERSITY EDUCATION					GROSS DOMESTIC PRODUCT (GDP)		GOVERNMENT SPENDING ON EDUCATION		TOURISM INVESTMENT %	COMPETITIVENESS INDEX		
			TOTAL (%)	FEMALE (%)	MALE (%)	TOTAL ENROLLMENT	TOTAL (%)	MALE (%)	FEMALE (%)	OFFICIAL AGE RANK	US \$ PER CAPITA	TOURISM %	GDP %	TOTAL GOVERNMENT BUDGET (%)		TOTAL	TRAVEL AND TOURISM	% OF TOURISM EMPLOYABILITY
Antigua & Barbuda	89.985,0	98.95	6.5	6.4	6.7	7,776	23.5	31.1	15.1	17-21	13,050	58.3	2.6 (2010)	6.9 (2010)	42	N/A	N/A	53
Aruba	102.911,0	97.52	21.9	17.8	26.4	7,292	16.2	22.6	10.2	17-21	2,544	88.4	6 (2011)	21.8 (2011)	31	N/A	N/A	90.8
Bahamas	377.374,0	N/A	N/A	N/A	N/A	33,254	N/A	N/A	N/A	17-21	21,570	43.6	N/A	N/A	18.3	N/A	N/A	51.6
Barbados	284.644,0	N/A	0.4 (***)	0.5 (***)	0.2 (***)	20,118	60.8	88.1	35.9	16-20	15,080	36.1	5.6	12.8	21.3	55/144	27/140	35.7
Belize	331.900,0	N/A	13.7	11.9	15.8	32,682	25.9	32.5	19.4	17-21	4,510	39.2	6.6 (2010)	21.8 (2010)	27.3	N/A	N/A	35.3
Colombia	48.321.405,0	94.67	25.6	25.7	25.5	4,364,549	48.3	51.6	45.2	17-21	7,590	5.9	4.9	16.9	3.7	66/144	84/140	6.1
Costa Rica	4.872.166,0	97.75	28.5	29	28	431,231	47.6	52.9	42.5	17-21	9,550	12.5	6.9	23.4 (2009)	3.6	51/144	47/140	12
Cuba	11.265.629,0	99.83	55.5	44.8	65.8	741,001	47.8	59.8	36.4	18-22	6,833	10.4	12.8 (2010)	N/A	15.5	N/A	N/A	9.6
Curacao	153.500,0	N/A	N/A	N/A	N/A	10,056	N/A	N/A	N/A	18-22	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Dominica	72.003,0	N/A	N/A	N/A	N/A	7,128	N/A	N/A	N/A	17-21	6,930	26.4	N/A	N/A	15.8	N/A	N/A	24

COUNTRY	TOTAL POPULATION	Literacy rate (population over 15 years old)	Enrolment in TVET as% of enrolment in secondary education			TERTIARY / UNIVERSITY EDUCATION					GROSS DOMESTIC PRODUCT (GDP)		GOVERNMENT SPENDING ON EDUCATION		TOURISM INVESTMENT %	COMPETITIVENESS INDEX		
			TOTAL (%)	FEMALE (%)	MALE (%)	TOTAL ENROLLMENT	TOTAL (%)	MALE (%)	FEMALE (%)	OFFICIAL AGE RANK	US \$ PER CAPITA	TOURISM %	GDP %	TOTAL GOVERNMENT BUDGET (%)		TOTAL	TRAVEL AND TOURISM	% OF TOURISM EMPLOYABILITY
Dominican Republic	10.403.761,0	91.79	7.3	8.4	6.1	961,480	46.4	57.2	35.7	18-22	5,770	16	3.8	20.6	5.1	101/144	86/140	14.7
El Salvador	6.340.454,0	87.98	53.1	54	52.1	679,147	25.5	26.9	23.9	19-23	3,720	10.1	3.4 (2011)	15.9 (2011)	8.6	84/144	104/140	9.1
French Guiana	232,223	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	17-21	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Grenada	105.897,0	N/A	14.5 (2005)	12.6 (2005)	16.6 (2005)	10,771	52.8 (2009)	60.9 (2009)	44.8 (2009)	17-21	7,490	24.2	N/A	N/A	13.7	N/A	N/A	22.1
Guadeloupe	404,394	96.50	N/A	N/A	N/A	N/A	N/A	N/A	N/A	17-21	N/A	16	N/A	N/A	7.3	N/A	N/A	16.5
Guatemala	15.468.203,0	81.54	83.9	85.8	82	1,567,642	18.7	19.1	18.4	18-22	3,340	8.8	2.8	20.6	8.2	78/144	97/140	7.9
Guyana	799.613,0	88.49	9.7	4.3	15.5	69,283	12.9	17.8	8.3	17-21	3,750	8	3.2	10.2	2.4	117/144	103/140	8.4
Haiti	10.317.461,0	60.73	N/A	N/A	N/A	1,021,020	N/A	N/A	N/A	19-23	810	9.5	N/A	N/A	4.2	137/144	140/140	8.2
Honduras	8.097.688,0	88.48	45.8	44.2	48	869,265	21.1	24.5	17.8	17-21	2,180	15.9	N/A	N/A	9.1	100/144	93/140	14
Jamaica	2.715.000,0	88.69	N/A	N/A	N/A	258,940	28.7	40.3	17.6	17-21	5,220	27.2	6.3	20.7	11.4	86/144	67/140	24.7
Martinique	399,637	96.98	N/A	N/A	N/A	N/A	N/A	N/A	N/A	17-21	N/A	13	N/A	N/A	3.6	N/A	N/A	12.3
Mexico	122.332.399,0	95.14	8.8	8.2	9.5	11,041,471	29	28.4	29.6	18-22	9,940	14.8	5.1 (2011)	19.6 (2011)	3	61/144	44/140	15.7
Nicaragua	6.080.478,0	82.81	4.6 (2010)	5	4.1	656,141	N/A	N/A	N/A	17-21	1,790	9.9	4.4 (2010)	22.8 (2010)	3.2	99/144	95/140	8.4
Panamá	3.864.170,0	95.04	30.4	28.5	32.6	326,482	43.5	53.2	34	18-22	10,700	17.5	3.3 (2011)	13 (2011)	7.1	48/144	37/140	17.2
Saint Lucia	182.273,0	N/A	N/A	N/A	N/A	16,763	13.9	18.5	9.3	17-21	7,060	39.5	4.7	14.5	20.5	N/A	N/A	44.1
Saint Martin	31.264,0	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	17-21	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Sint Maarten	39.689,0	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	18-22		N/A	N/A	N/A	N/A	N/A	N/A	N/A
St. Kitts & Nevis	54.191,0	N/A	N/A	N/A	N/A	4,276	18.2 (2008)	24.7 (2008)	11.8 (2008)	17-21	13,890	25.5	4.2 (2007)	12.8 (2007)	17.4	N/A	N/A	24.2

COUNTRY	TOTAL POPULATION	Literacy rate (population over 15 years old)	Enrolment in TVET as% of enrolment in secondary education			TERTIARY / UNIVERSITY EDUCATION					GROSS DOMESTIC PRODUCT (GDP)		GOVERNMENT SPENDING ON EDUCATION		TOURISM INVESTMENT %	COMPETITIVENESS INDEX		
			TOTAL (%)	FEMALE (%)	MALE (%)	TOTAL ENROLLMENT	TOTAL (%)	MALE (%)	FEMALE (%)	OFFICIAL AGE RANK	US \$ PER CAPITA	TOURISM %	GDP %	TOTAL GOVERNMENT BUDGET (%)		TOTAL	TRAVEL AND TOURISM	% OF TOURISM EMPLOYABILITY
St. Vincent & The Grenadines	109.373,0	N/A	N/A	N/A	N/A	10,112	N/A	N/A	N/A	17-21	6,460	19.9	5.1 (2010)	15.5 (2010)	15.9	N/A	N/A	18.2
Suriname	539.276,0	95.57	21.2	7.6	44.9	43,528	53.5 (**)	57.3 (**)	47.8 (**)	19-23	9,370	2.7	N/A	N/A	1.5	110/144	100/140	2.5
Trinidad y Tobago	1.341.151,0	98.96	2 (****)	1.1 (****)	3 (****)	96,366	12 (2004)	13.4 (2004)	10.6 (2004)	17-21	15,760	8.7	N/A	N/A	10.7	89/144	83/140	11.6
Venezuela	30.405.207,0	96.31	15.2	15.1	15.3	2,725,986	78.7	98.7	58.2	17-21	12,550	8.6	6.9 (*)	20.7 (*)	5.7	131/144	113/140	7.4

SOURCES OF INFORMATION:

World Bank: (<http://datos.bancomundial.org/indicador/SP.POP.TOTL>)

Datos 2010 (http://www.paho.org/saludenlasamericas/index.php?id=41&option=com_content)

GNI per capita, Atlas method (current US\$): <http://data.worldbank.org/indicator/NY.GNP.PCAP.CD>

(+) datos entre 2010-2013: Datos 2013 CEPAL (http://estadisticas.cepal.org/cepalstat/WEB_CEPALSTAT/perfilesNacionales.asp?idioma=e)

University Enrolment: <http://www.uis.unesco.org/DataCentre/Pages/country-profile.aspx?code=SUR>

Gross Domestic Product (million current us\$ 2012): <https://data.un.org/CountryProfile>

(*) 2009

(****) 2005

III. Scope of Work

This project is an initiative of the Association of Caribbean States (ACS) in collaboration with the French Development Agency (AFD), and is designed as a proactive approach to produce documentation and provide recommendations for strategies and procedures to strengthen human resource capacities in crosscutting areas necessary for a sustainable and competitive Regional Tourism Industry.

The main activities in the execution of the project are focused on data collection and assessment of Technical and Vocational Training initiatives, programs and institutions in the tourism and hospitality sectors (including training in tourism, catering and accommodation). The project also documents the findings of the data collection and assessment activities, indicative of the availability and status of tourism training programs, associated needs, and recommendations to address those needs. The project includes country specific and/or organizational case studies and best practices in each of the ACS sub-grouping: CARICOM (Barbados and Jamaica), Central America (Guatemala), the Non-Grouped Countries (Dominican Republic), the Group of Three –G-3, (Mexico and Colombia), and the Associate Member States (Guadeloupe).

Within the context of the execution of this project, the identification of training and capacity building needs as well as the subsequently development of a framework to implement training focused primarily on the strategic areas of the ACS Sustainable Tourism Work Program (STWP), was complemented by the needs and priorities identified by government agencies as well by education and training providers that participated in the research. The four Programmatic Areas that comprises the STWP indicative of the specific interest and focus for Training and Development, is as follows:

1. Establishment of the Sustainable Tourism Zone of the Caribbean (STZC): Emphasis on Environmental Stewardship; Sustainable Destination Management, Niche Markets.
2. Visitor Safety and Security: Emphasis on Tourism Policing; Food Safety and Security; Health and Wellness.
3. Promotion of Language and Cultures of the Greater Caribbean: Emphasis on Language Learning; Business Skills Development for Artisans.
4. Promotion of Multi-Destination Tourism: Emphasis on Tour-guide Training, Customer-Service Training.

The ACS also has a special interest in contributing to skills building and knowledge enhancement of vulnerable groups, therefore the training needs and priorities of these groups, would be addressed in the research. These include Micro, Small and Medium Enterprises (MSME's), women, youth and livelihoods for rural and indigenous communities that are related to tourism. The geographic scope of consultancy was limited to the ACS members as follows:

REGION	COUNTRIES
Caribbean Community (CARICOM):	Antigua and Barbuda, Barbados, Belize, Dominica, Grenada, Guyana, Haiti, Jamaica, St. Kitts and Nevis, St. Lucia, St. Vincent and The Grenadines, Trinidad and Tobago, Suriname and The Bahamas.
Central America (CA):	Guatemala, El Salvador, Honduras, Nicaragua and Costa Rica.
Non-Grouped (NG):	Cuba, Dominican Republic and Panama.
Group of Three (G-3):	Colombia, Mexico and Venezuela.
Associated Members:	Aruba, France (representing French Guiana, Guadeloupe, Martinique, Saint Maarten), Curacao, and Sint Maarten.

IV. Objectives of the Project

As laid out in the Terms of Reference “Technical Assistance to Undertake a Study on Technical and Vocational Education and Training (TVET) in Tourism in the Greater Caribbean”, the objectives of the project are:

A. Overall Objective

Procurement of research, information and data gathering to document the needs and priorities for Professional Training in the Tourism Sector in the Greater Caribbean, with the aim of developing a Framework for the development and implementation of a comprehensive technical and vocational education and training (TVET) and Capacity-building Program.

B. Specific Project Objectives

Specifically the project seeks to enhance the productivity and competitiveness of the Regional Tourism Industry through knowledge enhancement in the area of human resource development as follows:

1. Identify the specific needs and areas for Training and Human Resource Development in the Tourism Sector in the Greater Caribbean.
2. Determine existing gaps and challenges in relation to technical and vocational education and training (TVET) and Capacity-Building.
3. Provide recommendations and identified needs, challenges and priorities.
4. Develop a Directory of Tourism and Hospitality Training Institutions and courses offered in the Greater Caribbean.
5. Develop a Framework for implementation of a Comprehensive Program to deliver Training and Capacity building to the Tourism Sector to enhance human resource competencies and

productivity, based on Competency-Based Education and Training (CBET) model of the International Labour Organization (ILO).

6. Improve proficiencies in various aspects of the Tourism Product and Services delivery with particular emphasis on cross-cutting areas related to priorities of the ACS Member and Associate Member States as outlined in the STWP.

V. Methodology Applied in Data Collection

The project was outlined in two phases. From October 2014 to February 2015 the Phase 1 took place: Assessment of Training Initiatives in the Tourism Sector. First, we identified the national and regional educational institutions, as well as the technical and professional educational institutions that offer tourism courses, careers and training programs (both private and public); and we built a database with their contact information and a summary of the Tourism and Hospitality Training Institutions and its programs and courses offered in the Greater Caribbean.

The research methodology used was based on available written information –secondary data, research outcomes and data on TVET stakeholders (universities, national and regional training agencies), followed by information gathered by direct contact with education and work government officials and TVET related experts in the field. The documentary review used a systematic approach to summarize the available evidence on TVET interventions of the Greater Caribbean to inform about policies, practices, standards developed for tourism and hospitality sectors, training needs assessments of the tourism and hospitality.

Secondary data was the first source of information used since it is the most cost-effective. Secondary data available through published sources including literature reviews, surveys, evaluations, assessments, reports from NGOs, agencies, international organizations and/or government offices.

A. Research Strategy

Although several reviews have attempted to summarize the existing research in relation to TVET, we found no evidence of any related to the tourism and hospitality industry. A systematic and comprehensive search was used to locate published studies, books, articles, and statistics. A wide range of major bibliographic databases were electronically searched, along with websites of relevant organizations such as ILO-CINTERFOR and UNESCO-UNEVOC. Reference lists of reviews and studies were also examined. In addition, we conducted forward citation checking exercises and attempted contact with other relevant stakeholders of the Greater Caribbean region.

B. Selection Criteria

Studies and any other information considered were required to meet several criteria. First, they must have evaluated TVET intervention. Second, the geographical focus of the sources must include the Greater Caribbean sub-regions and countries. Third, they must have reported at least one eligible outcome variable measuring any of the scope topics of this consultancy (status, policies, strategies, challenges and priorities; specific needs for the tourism and hospitality sector for skills, training and/or human development; and employability). Fourth, the date of publication or reporting of the document should have been between 2000 and 2015. No language restrictions were applied, but most of the reviewed documents were published either in English or Spanish, some of them in French and a few in Papiamentu and Dutch.

C. Networks

We found four international networks related to technical and vocational education and training with information about the Greater Caribbean countries that were consulted and used during this consultancy

NORRAG - Northern Research Review and Advisory Group- Network for international policies and cooperation in education and training. NORRAG is an independent network whose Secretariat is located at the Graduate Institute of International and Development Studies in Geneva, Switzerland, with which it maintains close working relations www.norrag.org

NUFFIC - Netherlands Universities Foundation for International Cooperation- is the expertise and service centre for internationalization in Dutch education. From primary and secondary education to vocational training and higher education and research. From its headquarters in The Hague and eleven offices worldwide, EP-NUFFIC pursues its mission of internationalizing education, as an expert, service provider, knowledge centre, and as a model for the internationalization of education. It makes maximum use of the networks in the Netherlands and abroad and of its knowledge of developments in internationalization, programs and available resources, always working in collaboration with other organizations and experts. Maintaining and expanding networks and providing a platform for internationalization play a key part in these efforts. www.nuffic.org

UNESCO-UNEVOC - The UNESCO-UNEVOC International Centre for Technical and Vocational Education and Training located in Bonn, Germany, acts as part of the United Nations mandate to promote peace, justice, equity, poverty alleviation, and greater social cohesion. The Centre assists Member States develop policies and practices concerning education for the world of work and skills development for employability and citizenship, to achieve: i) access for all, ii) high quality, relevant and effective programmes, iii) learning opportunities throughout life. www.unevoc.unesco.org

ILO-CINTERFOR - The Inter-American Centre for Knowledge Development in Vocational Training (ILO/Cinterfor), located in Montevideo, Uruguay, since 1963 has been promoting management, collective construction of knowledge and South-South cooperation especially in issues related to the development of human resources. It is a specialized centre of the International Labour Organization -ILO- that articulates and coordinates the biggest and prestigious network of public and private institutions and entities, devoted to strengthening labour competencies. This network, comprising more than 65 institutions from 27 countries in Latin America, the Caribbean, Spain and Africa, collaborates actively in updating permanently the knowledge management platform, available to the world of vocational training. www.oitcinterfor.org/members

D. Personal contacts

CERTIFICA performed site visits and personal interviews in order to obtain qualitative data by capturing experiences and in-depth and detailed information. Site visits took place in Trinidad & Tobago, Guatemala and Guadeloupe between September 30 and November 26, 2014, and in The Bahamas in March 2015. Through these meetings we were able to collect information regarding the training and education offer (courses, certification, programs, institutions, etc.) and get to know how the TVET supply for the tourism sector is organized and at the same to have an idea of the countries TVET framework and the scope of national government institutions on TVET and the ILO labour competencies frameworks as well. The following table summarizes the site visits contacts:

Trinidad & Tobago September 30th – October 2nd

DATE	INSTITUTION	CONTACT	TYPE OF ORGANIZATION	ADDRESS
September 30	Trinidad and Tobago Hospitality and Tourism Institute (Tobago Campus) -meeting was celebrated with 2 more persons – the Marketing and Public Relations Manager and the Academic Director	Ms. Lyra Smith Acting Chief Executive Officer (CEO) ceo.tobagothti@gmail.com	TVET supplier	Scarborough, Tobago Tel: (868) 660-2196
October 1	SERVOL - meeting was with 3 persons, representing Mr. Pacheco who was sick that day-	Mr. Martin Pacheco Director reginalafoucade@gmail.com	TVET supplier	Fund Aid Bldg, Oxford Street, Port of Spain Tel.: 623 1632

DATE	INSTITUTION	CONTACT	TYPE OF ORGANIZATION	ADDRESS
October 1	Trinidad and Tobago Hospitality & Tourism Institute (Trinidad Campus)	Mr. Keith Robinson Head Academic	TVET supplier	Airways Road, Hilltop Lane, Chaguaramas Tel: (868) 625-4874, 634-4250/4456/2144-6 Ext 4061
October 1	Ministry of Tourism -meeting with 2 more persons that accompanied Mr. Mandray-	Mr. Richard Mandray Permanent Secretary madrayr@tourism.gov.tt trimv@tourism.gov.tt eckstineh2@tourism.gov.tt	Government organization related to TVET for the tourism sector	Tower C. International Waterfront Centre, Level 9, 1A Wrightson Rd, Port of Spain Tel: 624-1403 Ext: 230 /3151 / 4792 / 0963
October 2	International Labour Office (ILO)-meeting with 1 more person and Mr. Di Cola.	Giovanni Di Cola Director Decent Work Team and Office for the Caribbean dicola@ilo.org	TVET framework provider	6 Stanmore Avenue P. O. Box 1201 Port of Spain Phones: T: (868) 627-6304; 623-7178; 623-7704; 625-0524
October 2	National Training Agency -meeting with a representative of the NTA appointed by Ms. Parris-Searless	Ms. Patrice Parris-Searless Manager, Research, Planning and Development Patrice-searless@ntatt.org	Government organization in charge of TVET norms, standards, accreditation and policies	140-142 Mulchan Seuchan Road, Chaguana, Trinidad Tel: (868) 672-7108 ext 1327
October 2	University of the West Indies – Faculty of Social Sciences (Department of Management Studies)	Dr. Acolla Cameron Lecturer (Tourism specialty) acolla.cameron@sta.uwi.edu acolla.lewis@sta.uwi.edu	TVET supplier	UWI Campus, St. Augustine Tel: (868) 662 2002 Ext. 82105
		Dr. Leslie-Ann Jordan-Miller, Lecturer (Hospitality Specialty) leslie-ann.jordan-miller@sta.uwi.edu	TVET supplier	UWI Campus, St. Augustine Tel: (868) 662 2002 Ext. 83530
October 2	Tourism Development Company of Trinidad and Tobago (TDC)	Mr. Norris Clement nclement@tdc.co.tt	TVET supplier	Level 1, Maritime Centre, #29 Tenth Avenue, Barataria T: 675 7035 / 762 8331 (c)

Guatemala

October 14 – November 26

DATE	INSTITUTION	CONTACT	TYPE OF ORGANIZATION	ADDRESS
October 14	Instituto Guatemalteco de Turismo – INGUAT (Guatemala Tourist Commission)	Lic. Erick Alvarez, Tourism Training Department ervalvarez@inguat.gob.gt Licda. Marisol Girón, Training and Development Department mgiron@inguat.gob.gt	Government organization in charge of tourism policies.	7ª Avenida 1-17, zona 4 Edificio INGUAT Centro Cívico www.visitguatemala.com Tel.: (502) 2421-2800 Exts. 2331, 4131 & 4132
November 2	Universidad Rafael Landívar. Faculty of Economic and Entrepreneurial Sciences	M.A. Jenny Lemus Academic Coordinator jmlemus@url.edu.gt	Private University. Tourism higher education provider.	Campus Central, zona 16 Vista Hermosa II www.url.edu.gt Tel.: (502) 2426-2626. Exts. 2381 Y 2382
November 4	Instituto de Capacitación Técnica y Productividad – INTECAP (Technical training and Productivity Institute)	Lic. Roberto Mazariegos, Central Region Chief of Department rmazariegos@intecap.org.gt	Government organization in charge of TVET standards and TVET offer.	Calle del Estadio Mateo Flores 7-51, zona 5 www.intecap.org.gt www.intecap.org.edu.gt/centroturismo Tel.: (502) 2410-5555 Exts.: 60, 613, 614, 203 & 204
November 9	Universidad Mariano Gálvez de Guatemala – UMG. Business Management Faculty	Licda. Mahli Palma, Director of Hospitality, Catering and Tourism School. mpalma@umg.edu.gt	Private University. Tourism higher education provider.	3ª Avenida 9-00, zona 2; Interior Finca El Zapote. Tel.: (502) 2411-1800. Ext. 1122, 1185 & 1408 www.umg.edu.gt
November 10	Ministerio de Educación – MINEDUC (Ministry of Education)	Licda. Leticia Xican, Curricular Design Consultant	Government organization in charge of national education policy and development of competency-based for pre, primary and secondary schools; and the approval of curriculum for secondary-vocational education	Headquarters: 8ª calle 1-87, zona 10 Tel. (502) 2411-9595 www.mineduc.gob.gt Curriculum Design Department: 6ª calle 1-36, zona 10 Edificio Valsari Tel.: (502) 2411-9595

DATE	INSTITUTION	CONTACT	TYPE OF ORGANIZATION	ADDRESS
November 12	Ministerio de Trabajo y Asistencia Social – MTPS (Ministry of Work and Social Assistance)	Lic. Carlos Ulbán, Vice-Minister of Social Prevision and Employment	Government organization in charge of the design of the technical and vocational training policy.	7ª Avenida 3-33, zona 9 Edificio Torre Empresarial Tel.: (502) 2422-2501 www.mintrabajo.gob.gt
November 13	Ministerio de Ambiente y Recursos Naturales – MARN (Ministry of Environment and Natural Resources)	Licda. María Olga Morales, Environment Coordinator, General Training, Organization and Social Participation Directorate (Dirección General de Formación, Organización y Participación Social - DIGEFOPS)	Government organizations in charge of the environmental and natural resources policies. In coordination with the Ministry of Education, MARN promotes the formal and non-formal training and education environmental and natural resources policies.	20 Calle 28-58, zona 10 Edificio MARN, Torre I, Nivel 2 Tel.: (502) 2423-0500 Ext. 2120 www.marn.gob.gt
November 22	Universidad Del Istmo. Faculty of Economic and Entrepreneurial Sciences	Licda. Rosario Escobar, Business Management Department Director	Private University. Tourism higher education provider.	7ª Avenida 3-67, zona 13 www.unis.edu.gt Tel.: (502) 2327-1500 Dir.: (502) 2429-1451
November 26	Universidad Del Valle de Guatemala	Dr. Tomás Barrientos, Director Archaeology Department tbarrientos@uvg.edu.gt M. Sc. Claire Dallies de Masaya, Director Sustainable Tourism Management Department cdallies@uvg.edu.gt	Private University. Tourism higher education provider.	18 Avenida 11-95, zona 15 Vista Hermosa III www.uvg.edu.gt Tel.: (502) 2264-0336 – 40

Guadeloupe

October 14 – November 26

DATE	INSTITUTION	CONTACT	TYPE OF ORGANIZATION	ADDRESS
October 14	Gites de France – Guadeloupe.	Vannessa MOZAR – Coordinator	Private. Organization of small hotels (gites)	B.P. 759 Place de La Victoire 97172 Point a Pitre Cédex http://www.gitesdefrance-guadeloupe.com/ +590 590.916433
October 14	Comité du Tourisme – Les Iles de Guadeloupe	Alexandra JACOBY-KOALY Communication and Marketing Coordinator a.jakoby-koaly@lesilesdeguaadeloupe.com communication@lesilesdeguaadeloupe.com	Public - Private Responsible for the commercialization and marketing of the islands	5 square de la Banque BP 555 97166 Pointe a Pitre +590 590 82 83 44 http://www.lesilesdeguaadeloupe.com/
November 03	Conseil Régionale de la Guadeloupe - Observatoire du Tourisme	Naomi PETRINE Tourism Observatory coordinator naomi.petrine@cr-guadeloupe.fr	Governmental organization in charge of monitoring indicators of tourism in Guadeloupe	Conseil Régional de la Guadeloupe Rue Paul Lacave – Petit Paris 97109 Basse Terre CEDEX Tel : 0590 80 40 40 Fax : 0590 81 34 19
November 04	Maison Régionale de la Formation et de l'Emploi	Audrey KODADAY Chargée d'études OREF a.kodaday@carif-oref-gpe.org	Government organization in charge of TVET standards and TVET offer.	Campo d'Arbaud 26 Rue Flexi Eboue 97100 Basse Terre +590 590 99 35 24 www.carif-oref-gpe.org
November 04	Chamber de Commerce et de l'Industrie - Guadeloupe	Elodie ESTHER Chargée de Mission Tourisme-Environnement e.esther@guadeloupe.cci.fr	Private . TVET and sustainable Tourism assistant supplier	CCI DE REGION DES ILES DE GUADELOUPE Hôtel Consulaire - Rue Félix Eboué 97159 Pointe-à-Pitre Cedex Tél : 0590 93 77 11 Fax : 0590 93 76 55 www.guadeloupe.cci.fr guadeloupe.itineraire-eco3.com

DATE	INSTITUTION	CONTACT	TYPE OF ORGANIZATION	ADDRESS
November 05	Chamber de Commerce et de l'Industrie - Guadeloupe	David PASBEAU Responsible for training d.pasbeau@guadeloupe.cci.fr	Private . TVET supplier	CCI DE REGION DES ILES DE GUADELOUPE Hôtel Consulaire - Rue Félix Eboué 97159 Pointe-à-Pitre Cedex Tél : 0590 93 77 11 Fax : 0590 93 76 55 www.guadeloupe.cci.fr
November 06	Université Antilles et Guyane. Chamber de Commerce et de l'Industrie - Guadeloupe	Richard FLESSEL Richard.flessel@gmail.com Professor	Public. TVET supplier	CCI DE REGION DES ILES DE GUADELOUPE Hôtel Consulaire - Rue Félix Eboué 97159 Pointe-à-Pitre Cedex Tél : 0590 93 77 11 Fax : 0590 93 76 55 www.guadeloupe.cci.fr
November 06	Université des Antilles et de la Guyane	M. Joel RABOTEUR, Responsible for Formation	Public University. Tourism higher education provider.	Faculté des Sciences Juridiques et Economiques Campus de Fouillole BP 270 97157 Pointe à Pitre Cédex Guadeloupe www.univ-ag.fr Tel.: 590-483276
November 06	Conseil Régional de la Guadeloupe – Direction du Tourisme	Monique APAT Directeur du Tourisme, des Transports et du Désenclavement Numérique Monique.apat@cr-guadeloupe.fr	Government organizations in charge of the gubernamental policies of tourism.	Hôtel de Région . Avenida Pual Lacavé – Petit Paris – 97100 Basse Terre – CEDEX Tel +590 590 80 41 54 http://www.regionguadeloupe.fr/accueil/
November 06	Maison Régionale de la Formation et de l'Emploi	Muriel ARMAND, Directrice Adjointe m.armand@carif-oref-gpe.org Audrey KODADAY Chargée d'études OREF a.kodaday@carif-oref-gpe.org (second time)	Government organization in charge of TVET standards and TVET offer.	Campo d'Arbaud 26 Rue Flexi Eboué 97100 Basse Terre +590 590 99 35 24 www.carif-oref-gpe.org
November 06	Musée Costumes et Traditions	Camélia BAUSIVOIR Musee.costumes-traditions@orange.fr	Private. Tourism businesswoman	Périnet Gosier 0590 690 50 9816

DATE	INSTITUTION	CONTACT	TYPE OF ORGANIZATION	ADDRESS
November 07	Lyceé de l'Hôtellerie et de Tourisme	Natalie PEDURAND Elizabeth LEPIERRE ce.9711066g@ac-guadeloupe.fr	Public. TVET supplier	BP 249 Saint Félix 97190 Le Gosier http://www.lhtgosier.com/
November 10	Hotel Auberge de la Vieille Tour	Catherine CADROT Directrice Générale c.cadrot@auberge-vieille-tour.fr	Private – Hotel – TVET demand Case study recommended by Madame Apat	Mountauban, 97190 Gosier. www.auberge-vieille-tour.fr
November 11	Agence Nouvelles Iles	Agnès DATIL Agnès.datil@wanadoo.fr	Private – Tour Operator	Habitation Sainte Marthe, 97118 Saint-François, France +33 800 94 94 00 http://www.nouvellesiles.com/
November 11	Guide	Aurélien SIMION Guide d'accompagnement	Free-Lance Guide	Boisvin 97180 Sainte Anne Saint Anne

The Bahamas

March 9 – 13, 2015

DATE	INSTITUTION	CONTACT	TYPE OF ORGANIZATION	ADDRESS
March 9, 2015	Ministry of Tourism	Mr. Earlston McPhee, Director, International Relations & Economic Development emcphee@bahamas.com	Public	Bahamas Ministry of Tourism Center of Commerce, No. 1 bay Street, 2nd Floor P.O. Box N-3701 Nassau, Bahamas www.bahamas.com
March 10, 2015	Ministry of Tourism	Mr. Ian R. Ferguson Director Industry Training iferguson@bahamas.com	Public	Bahamas Ministry of Tourism Norfolk House, Frederick St. P.O. Box N-3701 Nassau, Bahamas
March 11, 2015	The College of The Bahamas	Phd. Sophia Rolle Executive Director Culinary and Hospitality Management Institute sophia.rolle@cob.edu.bs	Public/Private	Oakes Field Campus Thompson Blvd. and Poinciana Drive P.O.Box N-4912 Nassau, Bahamas

DATE	INSTITUTION	CONTACT	TYPE OF ORGANIZATION	ADDRESS
March 11, 2015	The Bahamas Hotel And Tourism Association	Suzanne Pattusch Executive Vicepresident spattusch@bahamashotels.org	Private	Hotel's House East Bay Street P.O. Box N-7799 Nassau, Bahamas
March 12, 2015	Ministry of Education	Ms. Sharon Ferguson Education Officer Family & Consumer Sciences Department of Education bullard53@gmail.com	Public	Thompson Blvd. Nassau, Bahamas
March 13, 2015	Atlantis	Karen Sutherland Senior Director of Training and Development karen.sutherland@atlantisparadise.com	Private	Atlantis, Paradise Island P.O. Box N-4777 Nassau, Bahamas

We also e-mail national tourism authorities representatives and Ministries, Secretariats, Departments of labour and education of the Greater Caribbean region, asking for them to respond on-line surveys and provide information of any potentially relevant study.

E. On-line surveys

To supplement the electronic research, and obtain a deeper understanding of the offer, needs, priorities and challenges of TVET for tourism in the Greater Caribbean, we also structured two on-line surveys –primary quantitative and qualitative data. An online survey is a questionnaire that the target audience can complete over the Internet. Online surveys are usually created as Web forms with a database to store the answers and statistical software to provide analytics¹⁷.

Primary quantitative data was collected via on-line questionnaires that focus on information that can be counted and subject to statistical analysis. Primary data is scalable, objective, promotes accurate and standardized results.

One questionnaire was designed for the TVET providers (universities, post-secondary institutions, technical and vocational institutes) that survey included 13 formal questions in

¹⁷ Concept of on-line survey by Techopedia: <http://www.techopedia.com/definition/27866/online-survey>

order to identify the TVET institutions and key stakeholders as well as to determine the needs, challenges and priorities from their perspective, in regards to TVET for tourism.

The second survey targeted the national government institutions related to TVET: ministries/secretariats/departments and/or institutes of tourism, labour and education. The aim of the survey was to recognize the strategies, policies, priorities and challenges of each country as well as to identify if the countries have a formal TVET structure and if it included the tourism industry.

Even originally we have developed a private-sector survey, due to limitation of time and resources we were not able to perform it and we used the information provided in the site visits interviews and training assessments needs and other relevant surveys already performed in the countries that were selected as Case of Study (Barbados, Costa Rica, Guadeloupe, Dominican Republic, Guatemala, Jamaica, Mexico and The Bahamas), and complemented with the surveys and assessments described in the following chapter.

VI. Survey Results

A. Data collection and Analysis

The electronic literature search yielded a total of 979 potentially relevant documents (books, studies, publications, presentations, articles, and concept papers). We have also identified a major TVET database (UNESCO-UNEVOC), and 55 web pages related to education, employment and tourism information and statistics (the most relevant ones are World Data on Education/UNESCO-IBE, World Bank, ILO, Class base, ILO-CITERFOR, CEPAL, and OECD), 65 documents outlining the tourism country profiles, competitiveness indexes and economic impact of the travel and tourism industry (UN-WTO, WTTC, WEF), 9 national assessments on training needs for the tourism industry (Guatemala, Colombia, Mexico, Belize, Dominica – focused on Protected Areas, Grenada –general for labour market needs, St. Vincent and the Grenadines –general for labour market needs, St. Lucia –two surveys, one related to protected areas training needs and one related to labour market needs). Three (3) regional assessments for Central America –one of them including Dominican Republic and Panama. Finally, one performed by SEBIG-WTO including 12 countries of Latin America but related to the scope of this consultancy: Colombia, Cuba, El Salvador, Guatemala, Mexico and Dominican Republic.

After identifying the useful and pertinent ones to the purposes of this consultancy, we classified them by topics in order to develop a theoretical framework for TVET which was addressed in section II. B. of this report.

The following surveys/publications, addressing the needs, challenges, priorities and status of TVET and NQF in the Greater Caribbean, were selected and was used as part of the benchmarking done:

- World Tourism Highlights Edition 2014. UNWTO
- World Travel Market Global Trends Report 2014. (November 2014).
- CARICOM Regional TVET Strategy for Workforce Development and Economic Competitiveness: Skills and Credentials – The New Global Currency. Caribbean Association of National Training Agencies – CANTA (March 2014).
- Status Report on the Education Management Information System (EMIS) on Technical and Vocational Education and Training (TVET) in 12 countries in Latin America and the Caribbean. UNESCO-UNEVOC 2013.
- Coyuntura Laboral en América Latina y el Caribe: Desafíos e innovaciones de la formación profesional (The employment situation in Latin America and the Caribbean: Challenges and innovations in vocational training). Economic Commission for Latin America and the Caribbean – CEPAL / International Labour Organization – ILO (October 2013.)
- 2012: The Year of Global Reports on TVET, Skills & Jobs. Network for Policy Research Review and Advice on Education and Training – NORRAG/UNESCO (April 2013).
- Subjects, focuses and actors of vocational training. ILO Recommendation 195. International Labour Organization (2013).
- Report on Skills Gaps. Background Paper Prepared for the Education for All Global Monitoring Report. United Nations Educational, Scientific and Cultural Organization (2012).
- Labour Overview 2011: Latin America and the Caribbean. International Labour Organization (February 2012).
- Informe Final: Estudio de la Oferta y la Demanda de Formación de los Recursos Humanos en el Sector Turístico en América Latina (Final Report: Supply and Demand Survey for the Human Resources Training for Tourism Sector in Latin America). World Tourism Organization, Ibero-American General Secretariat SEGIB/OMT (October 2009).
- School Management and Educational Certification for Development and Accreditation of Key and Basic Labour Competencies at the Upper Secondary Level. Organization of American States (February 2009).
- Concept Paper for the Development of a CARICOM Strategic Plan for Vocational Education Services in the CARICOM Single Market and Economy. School of Business, University of West Indies (2009).
- Skills for improved productivity, employment growth and development. International Labour Organization (2008).
- Caribbean Labour Market Challenges and Policies. Economic Development Division, CEPAL (March 2006).

- Modernización de la Formación Profesional en América Latina y el Caribe. IFP/Skills, Working Paper 5 (2006).
- A Guide to Tourism Careers, Education and Training in the Caribbean. Caribbean Tourism Organization (1999).

Furthermore, we also consulted several national reports and documents which were benchmarked with the interviews and responses from the questionnaires we sent to government officials and educational and training institutions in order to outline the training needs, the priorities, and the challenges of the Greater Caribbean Region.

- TVET national policies and/or strategies of Bahamas, Barbados, Belize, Colombia, Costa Rica, Cuba, Dominican Republic, El Salvador, France (Overseas Territories), Grenada, Guatemala, Guyana, Honduras, Jamaica, Mexico, and Trinidad and Tobago.
- Tourism training needs assessments:
 - From the General Ibero-American Secretariat (SEGIB for its Spanish acronym) of the UNWTO (Colombia, Cuba, Dominican Republic, El Salvador, Guatemala, Mexico and Venezuela. The assessment include other Latin-American countries that are not members of ACS),
 - St. Vincent & the Grenadines, an assessment leaded by the Ministry of Tourism.
 - Guatemala four assessments, one leaded by the Guatemalan Development Foundation (FUNDESA for its Spanish acronym) in 2008, other (2012) leaded by the Guatemala Chamber of Tourism, INTECAP (2013), and the most recent one undertook by ASIES (2014)
 - Honduras one tourism training report executed by the Ministry of Tourism.
 - Central America: A regional training needs assessment in for small hotels performed by OAS, and another regional TNA for the tourism sector developed by INCAE.
 - Costa Rica: A national training needs assessment and work positions for several sectors including tourism.

B. On-line surveys for TVET providers

CERTIFICA possess a professional account with Survey Monkey that allows the use of our logos and structuring the survey with no limitations on the number of questions. These were the results of the on-line survey for the TVET providers (offer).

We obtained responses from contacts of Barbados, Belize, Colombia, Costa Rica, Dominica, Guadeloupe, Guatemala, Haiti, Honduras, Martinique, Mexico, Panama, Trinidad & Tobago, and Venezuela.

Regarding the importance of the tourism sector in their countries, 74% responded it is high and 21% responded is middle 5% considered it is low. In respect to the interest they perceived from the tourism businesses in their workers to attend TVET courses and/or certification programs, 76% said that the tourism businesses do have interest in their workers to attend training programs available and 25% considered they do not. Fifty three percent (53%) of the respondents said that their country do have TVET programs for tourism while 47% said they do not.

In a range from 1 to 5, let 1 representing the lowest and 5 the highest, the respondents said the priorities of the TVET offer for tourism is focused on:

Customer service (5) 45%

Sustainability/environmentalism (4) 20%

Foreign languages (4) 25%

Technology (3) 10%

Other identified were multi-cultural training, history, gastronomy, traditions, tour guiding, corporate social responsibility, and tour operation management.

The TVET providers identify a combination of different sources for financing their activities and programs, however the payment of tuition feed represent the most important source (70%) followed by national budget assignation (20%) and some of them also obtain funds from international cooperation, and contributions from private sector.

1. Priorities of TVET for tourism

- Students to get the proper certification so they may start exercising their skills after graduation.
- Provide high quality training programs attending the needs of the country and the industry.
- Highly qualified lecturers.

2. Needs of TVET for tourism

- Funds to build proper infrastructure and facilities
- Scholarships
- International internships
- There is a high demand of TVET for tourism but few offerings.
- Develop field/practical experience.
- To develop level 4 and 5 programs.
- More support from government.
- To include municipalities in the training and education sector programs.

- Increase participation of private sector in the development of policies, competency-based standards and training programs.
- To develop e-learning platforms for tourism.
- To diversify the methodologies of TVET, i.e.: on-the-job training.

3. Challenges of TVET for tourism

- Lack of skilled/trained human resources.
- Find certified or qualified trainers and lecturers.
- Job placement.
- CVQ to become a requirement for employment.
- The lack of a functional facility fully outfitted with the necessary furnishings to provide quality standard trainings and education.
- Tourism businesses need to demonstrate commitment to front-line employees by providing livable wages and opportunities for both personal and professional growth.
- To develop entrepreneurship skills: businesses plans development.
- Career guidance in work competency and experience within the tourism sector.
- To promote business linkages among individual and micro-small tourism businesses and middle-big tourism enterprises.
- Diversification of tourism services and products.
- To develop and deliver competency-based training programs.

4. Opportunities of TVET for tourism

- To develop a cadre of competent, specialized, and qualified personnel to meet the needs of the industry.
- More networking between the hospitality industry and training institutes, including secondary schools that offer tourism programs.
- To implement the competency-based profiles developed for the tourism industry.
- Tourism is a highly dynamic and economically viable activity.
- Tourism promotes competitiveness of the country.
- To become a sustainable industry.
- Diversification of tourism services and products.

C. On-line surveys for government representatives

For the questionnaire to government institutions, we used the Hennerly-Hicks training needs analysis questionnaire. Questions were typically multiple choice and participants choose the most appropriate response among those listed for each question. This questionnaire was answered by contacts from Belize, Colombia, Dominica, El Salvador, Guadeloupe, Guatemala,

Haiti, Honduras, Mexico, Panama, Trinidad & Tobago, and St. Vincent & the Grenadines; representing national tourism authorities, ministries/secretariats of labour and education. National tourism authorities from The Bahamas, Costa Rica, Grenada, Nicaragua, Panama and Venezuela acknowledge receipt of them but never answer it. These were the results:

For the government representatives tourism and hospitality industry is very important. Seventy three percent (73%) considered it highly important, 16% said the importance of tourism in their countries is middle and 11% considered it low. None of the respondents answered what is the percentage of contribution of the tourism sector to the GDP and/or the country's payment balance.

Sixty three percent (63%) –being the majority from CARICOM, of the respondents said that the tertiary education system of their countries used competency based methodologies, while 37% said they education methodologies in the tertiary education system has a traditional approach.

Sixty seven percent of the respondents affirm that their countries has a TVET scheme, strategy, and/or policy developed; while 33% said that in their countries does not exist a scheme, strategy of policy for TVET-mostly from Central America.

In the countries where the TVET scheme exists, 62% said that is addressing tourism and hospitality industry, however 38% said it is not. Same percentages result when we asked if a TVET Council for tourism exists.

A total of 887 standards have been developed and from those 85 are related to tourism and hospitality, representing 9.5% of the total. The average of those standards (in the five countries where they were identified) is 345 and 22 of them are related to tourism and hospitality representing 6.37% of the total.

From the list below, the respondents identified the areas that considered require additional and specific training based on competencies (1 being the lowest rank and 10 the highest):

EDUCATION AND TRAINING TOURISM AREAS	AVERAGE RANK IN CARICOM	AVERAGE RANK IN LATIN AMERICA	AVERAGE RANK IN FRENCH SPEAKING COUNTRIES	TOTAL AVERAGE RANK
Foreign languages (French, German, Spanish, Portuguese, Cantonese, among others)	8	9.14	8.33	8.49
Multi-destination promotion	6.2	8.71	9	7.97
Sustainable Tourism (environmental management and preservation of natural resources best practices)	7.6	9.43	7.33	8.12
Promotion of cultural aspects such traditions, art, handicrafts and gastronomy manifestations, among others.	7.4	8.86	7.33	7.86
Marketing general knowledge.	7.6	8.14	7.33	7.69

EDUCATION AND TRAINING TOURISM AREAS	AVERAGE RANK IN CARICOM	AVERAGE RANK IN LATIN AMERICA	AVERAGE RANK IN FRENCH SPEAKING COUNTRIES	TOTAL AVERAGE RANK
On Line and social media marketing tools.	7.4	8	7.33	7.58
Leadership and management skills as well as competencies for medium and high level positions such as head of departments or divisions.	8	8.14	5.67	7.27
Technical training for operative tasks -for example receptionists, bartenders, waiters, housekeeping for hotels, tour guiding, defensive driving, first aids, and others.	7.2	8.14	5.67	7
Quality and culture of service as a cross cutting aspect in all technical training and vocational education.	8	8.14	6.67	7.60
Emotional intelligence as a cross cutting aspect in all technical training and vocational education.	7.2	8.71	6.33	7.42

Even the total average is high (7.7) the highest of the 10 areas analysed are foreign languages (8.49) and sustainable tourism (8.12). The lowest is the technical training for operative tasks (7).

Seventy two percent (72%) of the respondents said that the tourism technical training and vocational education available in their countries does not meet the needs of tourism businesses, while 28% said it does.

The following table shows the results of the 22 aspects/topics the respondents consider needs to be strengthened (let 1 be the lowest importance and 5 the highest importance).

ASPECTS/TOPICS THAT NEED TO BE STRENGTHENED	AVERAGE RANK IN CARICOM	AVERAGE RANK IN LATIN AMERICA	AVERAGE RANK IN FRENCH SPEAKING COUNTRIES	TOTAL AVERAGE RANK
Language skills	4.6	4.57	4.33	4.50
Oral and written communication skills	4.4	4	3.67	4.02
Outgoing personality & people skills	4	4	3.33	3.78
IT competencies	4	4.86	4	4.29
Teamwork	4.2	4.29	3.33	3.94
Service skills	4.6	4.57	2.33	3.83
Professional appearance	4.2	4.14	3	3.78
Understanding of industry expectations	4	4.71	3.33	4.01
Self-pride, self esteem	4	4.14	4.33	4.16
Work spirit and ethics	4.6	5	4	4.53
Leadership	4.8	4.57	3.33	4.23
Tourism and hospitality knowledge	4	4.29	3.67	3.99

ASPECTS/TOPICS THAT NEED TO BE STRENGTHENED	AVERAGE RANK IN CARICOM	AVERAGE RANK IN LATIN AMERICA	AVERAGE RANK IN FRENCH SPEAKING COUNTRIES	TOTAL AVERAGE RANK
Problem solving	4	4.57	3.67	4.08
Cross-cultural sensitivity	3.76	4.43	2.67	3.62
Emotional intelligence	3.6	4.43	3.33	3.79
Inquisitiveness, creativity and innovation	3.8	4.57	3.33	3.90
Openness to new perspectives and influences	3.6	4	3.67	3.76
Cross-cultural negotiations	3.8	4.43	4	4.08
Managing uncertainty and complexity in international business environments.	3.8	4.29	3	3.70
International adjustment and adaptability	3.6	4.43	3.33	3.79
Sustainable tourism knowledge and commitment	4.8	5	3	4.27
Clerical and administrative skills	3.2	4.14	3.67	3.67

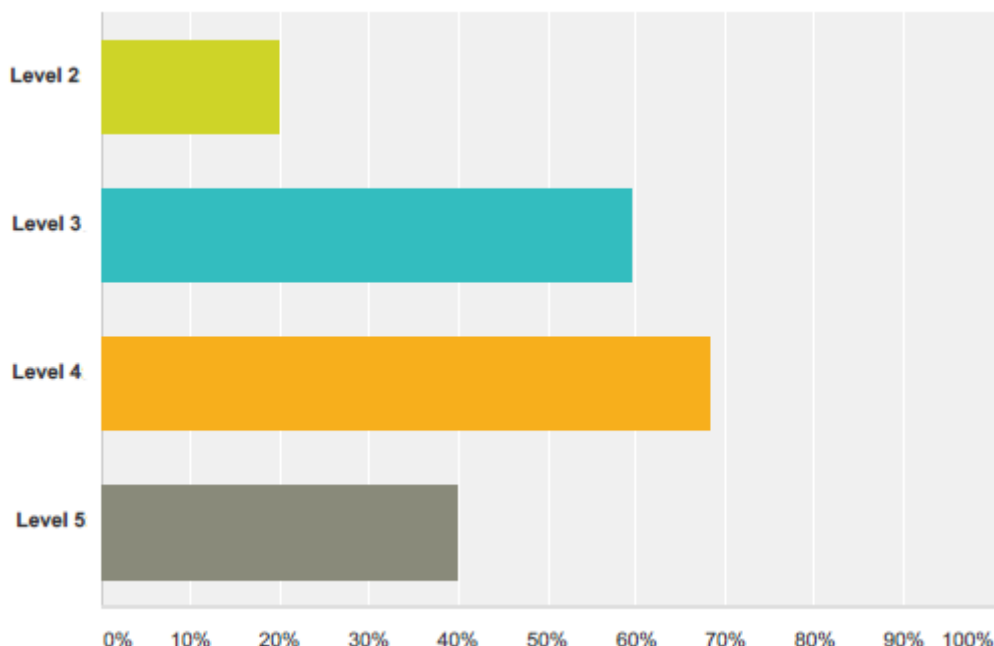
The aspects were ranked among 3.63 to 4.53 from 5, which means that need a middle and high strengthening. Work spirit and ethics is the one aspect ranked as the most needed to be strengthened (4.53), while cross-cultural sensitivity obtained the lowest rank 3.62.

To the question if the country is currently working on the issuing of certifications of labour competencies for tourism sector or a CVQ, 100% of the CARICOM respondents said they do, while in Central America, Mexico and Colombia 50% said they are and 67% of the respondents from Haiti, Guadeloupe and Martinique said the tourism training and/or competencies are being certified. In average 72% affirm there exist a certification or a CVQ award for tourism while 28% percent said there is not.

In the countries where tourism CVQ and competencies certification are being awarded, the following levels of education were identified:

LEVELS OF CERTIFICATION	CARICOM %	MEXICO, COLOMBIA AND CENTRAL AMERICA %	HAITI, MARTINIQUE AND GUADELOUPE %
Level 2: First cycle of secondary education or college second cycle	60		
Level 3: Second cycle of secondary education (VT in general)	80	33	67
Level 4: Technical education	40	100	67
Level 5: First state of tertiary education (university in general)	20	33	67

AVERAGE PERCENTAGE OF CVQ OR COMPETENCY-BASED CERTIFICATION FOR TOURISM



We provided a pre-established aspects addressed in the different studies and reports used as documentary information. From those, respondents ranked the priorities, needs, and challenges that from their perspective are the top ones. These are the results:

1. Priorities	PERCENTAGE OF IMPORTANCE
Creating a holistic and integrated system of education and training from early childhood through primary, secondary and tertiary education to lifelong learning at all levels, including home-based, community-based and workplace-based education	18
To clearly define the targeted population for the TVET scheme/framework or program in your country (for children at secondary and tertiary education level, for adults only, or for both).	13
Develop policies that are internationally benchmarked and driven by labour market needs	42
Strengthening connections between TVET and academic higher education in order to facilitate the transfer of learning and skills between the two.	11
Develop an effective TVET system that enhances the competitiveness of the country's economy and contributes to gender equity and poverty reduction.	16

The most important priority identifies is the development of policies that are internationally benchmarked and driven by labour market needs (42%). In lowest and similar importance are the other four aspects.

2. Needs	PERCENTAGE OF IMPORTANCE
Include lifelong learning in formal education & training programs.	20
Increase public sector incentives such as scholarships and long-term technical assistance awards for proceeding to tertiary education.	12
Facilitating student mobility between secondary and post-secondary/tertiary levels, within TVET, and between TVET and other forms of learning;	9
Facilitating the transfer of credits from one educational institution to another;	14
Making education and training more responsive to changing labour market demands, thus increasing education and career opportunities	38
Making your country's qualifications internationally comparable.	7

The most voting need is making education and training more responsive to changing labour market demands, thus increasing education and career opportunities, and the less voting "making country's qualifications internationally comparable".

3. Challenges	
Reform education & training national policies in order to include and properly address a new or the existent technical vocational and education training (TVET) national program.	19
The generalize use of a Certification of Vocational Qualifications – CVQ- in the national labour market.	10
Rationalization of a TVET scheme or framework for your country.	10
Diversification of economic activities covered by the present TVET scheme in your country.	48
Common understanding that human capital development is a major contributor to economic growth and sustainable wealth creation in your country.	13

The challenge identified as the most important to be addressed is the diversification of economic activities covered by the present TVET scheme (48% of the total).

D. Formal, non-formal and informal technical and vocational education and training offer for Tourism in the Greater Caribbean

The tourism sector is a very complex industry, encompassing a wide range of economic activities and involves a substantial investment in human capital. Upgrading human resources in tourism is a key factor to improve both the competitiveness and employment opportunities within the industry.

Over the last forty years, education related to the tourism and hospitality industry have been expanding and has become established as a notable and distinct part of the repertoire of higher, post-secondary, secondary and non-formal education.

The general outlook for the tourism and hospitality industries is quite strong. Management level positions with strong hospitality experience are in high demand and there are specialized undergraduate degrees for many of the jobs in the hospitality and tourism industries. For example, hotel management, restaurant management, and travel operations are popular fields of study that are still in high demand. Many of the service level positions do not require undergraduate degrees; however, do require specialized schooling. Chefs, for example, have rigorous required training programs, which are as difficult and time consuming as many universities. It is clear that highly skilled and qualified workers and tourism services providers is determinant in scaling-up tourism competitiveness for the region; and TVET plays an important and priority role.

Tourism is changing and becoming increasingly complex, requiring higher-level skills and opening up new career opportunities, while still offering a core pool of low skilled jobs. Skills development is a cumulative life cycle process that begins during early childhood development and continues through general and tertiary education, technical and vocational education and training (TVET) and on-the-job training (OIT). TVET contributes to economic growth and competitiveness by enhancing productivity, at individual, business and national level. TVET is an education, training or learning activity, which provides knowledge, skills and attitudes relevant for employment or self-employment. It describes all kinds of formal, non-formal and informal training and learning either it occurs in institutes, schools, training centres or the workplace.

Regarding the careers (formal and non-formal) and courses (informal) offered related to tourism industry, a compilation of the Greater Caribbean country education profiles and the contact information of the institutions offering careers and/or courses, scholarship opportunities, and specific curriculum were developed. The following table summarizes this offer that is addressed in detailed in the TVET Catalogue of the Greater Caribbean:

COUNTRY	No. of ESTABLISH -MENTS	INFORMAL	NON-FORMAL	FORMAL		
		FREE COURSES AND CONTINUING EDUCATION	TECHNICAL AND VOCATIONAL	SECONDARY AND POST SECONDARY	UNIVERSITY (TECHNICAL /ASSOCIATE DEGREE)	UNIVERSITY (B.S. , MASTER, DOCTORATE)
CARICOM						
Antigua & Barbuda	1	6	7			
Bahamas (The)		57	2		14	2
Barbados	5			36	13	3
Belize	4	7	2	3	4	2
Dominica	1	8			1	2
Grenada	1				3	
Guyana	8		6	6	10	1
Haiti	8	2	14		1	4
Jamaica	14		15		14	22
St. Lucia	1		1		2	
St. Kitts and Nevis	1				1	
St. Vincent and The Grenadines	1				2	
Suriname						
Trinidad and Tobago	6	39	12		5	5
CENTRAL AMERICA						
Costa Rica	23	10	53	3	35	15
El Salvador	5	12				
Guatemala	207	15	17	200	22	10
Honduras	5		2		2	3
Nicaragua	10		21			7
G-3						
Colombia	16		50		7	11
Mexico	19		48		12	21
Venezuela		61			7	7
NON-GROUPED						
Cuba	7	3				14
Dominican Republic	15	2	18		4	10
Panama	17	1	9	7	19	24
AFILIATED STATES						
Aruba	1		3			
Curacao						
Guadeloupe	7	2		8		1
Martinique	9	16	15	10	2	3
Saint Martin	1				7	
Sint Maarten	1	1			6	

The majority of the programs are in Latin America. In Mexico there are more than 700 universities offering technical/associate degrees as well as baccalaureates (*licenciaturas*), post-

graduate studies and masters of tourism and tourism-related areas, but due to the high amount, only 19 accredited universities were included in the scope of this consultancy. And we also did the same selection in Venezuela, Colombia and Costa Rica.

For Guatemala we identify 200 post-secondary vocational institutions offering tourism-related careers but are only listed in the survey and were not included in the TVET catalogue.

Suriname does not have specific tourism training and education offer for the tourism industry. In 2013 an Agreement was signed with Venezuela to facilitate this kind of studies for those interested young boys and girls.

E. Gap Analysis

As the Global Competitiveness Report (GCR) 2013 – 2014 stands, the quantity and quality of the basic education received by the population, which is increasingly important in today's economy is one of the pillar to take into account to measure a country's competitiveness and productivity. Basic education increases the efficiency of each individual worker. Moreover, often workers who have received little formal education can carry out only simple manual tasks and find it much more difficult to adapt to more advanced production processes and techniques, and therefore contribute less to devising or executing innovations. In other words, lack of basic education and moreover, lack of technical education and competence based training can become a constraint on business development.

Quality higher education and training is crucial for economies that want to move up the value chain beyond simple production processes of products and services. In particular, today's globalizing economy requires countries to nurture pools of well-educated workers who are able to perform complex tasks and adapt rapidly to their changing environment and the evolving needs of the production system. The GCR measures secondary and tertiary enrolment rates as well as the quality of education as evaluated by business leaders. The extent of staff training is also taken into consideration because of the importance of vocational and continuous on-the-job training—which is neglected in many economies—for ensuring a constant upgrading of workers' skills.

The labour market efficiency and flexibility are critical to ensuring that workers are allocated to their most effective use in the economy and provided with incentives to give their best effort in their jobs.

The Germans are leaders in vocational/technical training. The German Federal Ministry for Economic Cooperation and Development (2005) agrees that labour market information is vital for developing demand-driven training. In their strategy paper, Technical and Vocational

Education and Training and the Labour Market in Development Cooperation, the German Ministry states that “reliable labour market information and monitoring of employment impacts are extremely important in developing needs-related technical and vocational education and training and labour market policy measures”.

Workers who are trained in a demand occupation not only possess the skills which will be attractive and in need by employers, but they will have increased self confidence that they will be employed longer and in an occupation that will be around for a while.¹⁸

An emerging trend in TVET includes employers involved in the training of the future workforce through Training Networks. Training Networks include a partnership formed through an agreement where TVET Institutions, employers, industry associations, education entities and community stakeholders all contribute to the training of the emerging and incumbent workforce. Training opportunities are many and varied. They may occur:

- in the classroom,
- in the field at employer sites through on-the-job training or apprenticeships,
- through employer’s company/industry training,
- in partnership with secondary schools or NGOs, or
- on the job after a student has officially been hired by an employer.

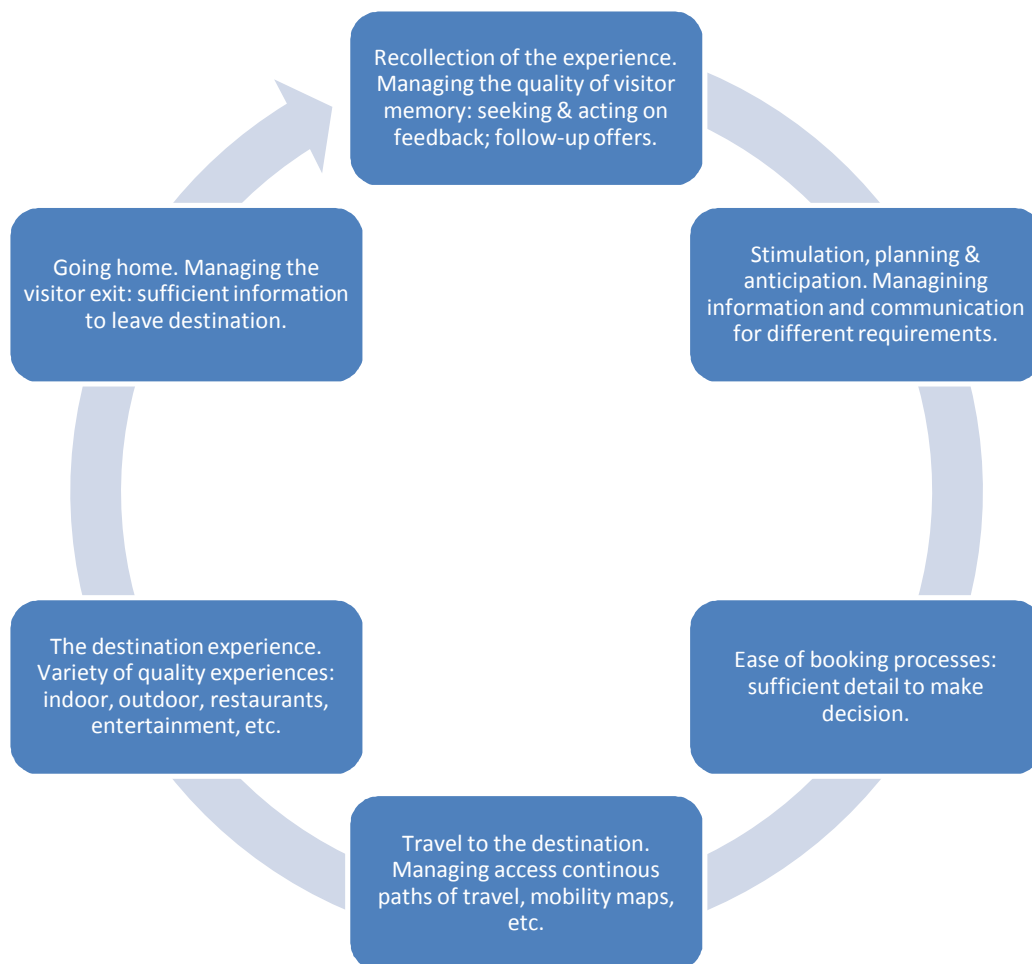
1. Occupations and Skills Needs

Based on desk research, surveys and case studies, it is evident that training of students and personnel should be designed according to a number of important parameters including:

- The context of training (for student education, job trainee, employee-in-service-training, manager of other professional).
- The trainee’s prior qualifications, knowledge and experience.
- The level of the training to be delivered – related to the particular role and job specifications (competency-based profiles).
- Tourists’ specific requirements, arising from customer service, health conditions and other factors. Visitors may require different services at different points. The figure below illustrates the six phases of the visitor journey¹⁹.

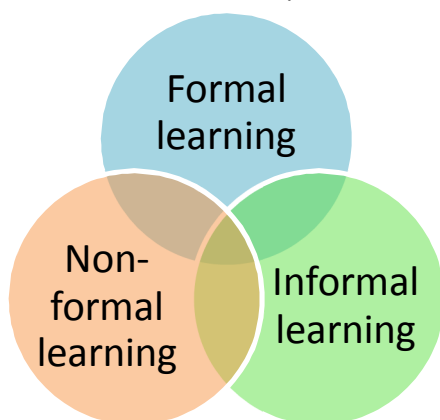
¹⁸ Labor Market Analysis Leads to Demand-Driven TVET Programs. Jill Elkins, Chris Zrzeminski, and Carl Nink. Management & Training Corporation. 2012.

¹⁹ Adapted from best Practice in Accessible Tourism. Dickson, T. and Darcy, S (2012). Australia.



2. The concept of learning

The concept of learning²⁰ is very closely linked to the concept of competence, which refers to the range of abilities and skills which a person and enterprise may possess or acquire in order to carry out their roles and task effectively. This would include:



- The individual's capability to make the full use of technical, personal and soft skills and qualifications in the business contexts.
- The business' capability to engage, combine and use the individually competency-based in an organic manner.

²⁰ European Commission (1999)

3. Skill levels

For defining skills requirements that are specific to certain occupations, it is necessary to take a closer look at:

- The actual job / task entails.
- Where the person is working on expects to work.
- What degree of customer contact they may have.

Tourism services providers need basic and in-depth skills appropriate to the occupational roles and the degree of customer contact involved in work tasks.

a) *Basic skills requirement*

KNOWLEDGE	SKILLS	COMPETENCE
Factual and theoretical knowledge in broad contexts within a field of work or study	A range of cognitive and practical skills required to generate solutions to specific problems.	Exercise self-management within the guidelines, taking some responsibility for the evaluation and improvement of work.

b) *In-depth skills requirement*

KNOWLEDGE	SKILLS	COMPETENCE
Comprehensive, specialized, factual, and theoretical knowledge within a field of work or study and an awareness of the boundaries of that knowledge.	A comprehensive range of cognitive and practical skills required to develop creative solutions to abstract problems.	Exercise management and supervision, review and develop performance of self and others.

4. Legislation

Key factors that influence the supply of training provisions are tourism policy and legislation. In those countries where tourism is part of the national development policies, there seems to be a higher number of available training courses. Legislation seem to encourage the proliferation of training courses, when legislation is being properly enforced.

5. Existing training initiatives

Available training provisions across the Greater Caribbean is relatively similar. At the same time, similar challenges seem to be pertinent to the tourism industry as a whole. Availability is a poor indicator of quality, as it does not necessarily give an indication of its impact on the overall provision of tourism services.

In order to understand the impact and efficiency of existing training provisions identified in this research, it is necessary to contextualize the role of training in the wider tourism sector.

Key gaps in the existing training landscape include a gap in the actual availability/provision of training, a gap in the development of the business case for training and a gap in evaluating the impact of training on customers, staff and businesses.

A majority of courses are directed to frontline staff. However, there is a recognition that it is important to reach managers for the training to have a more long-lasting impact.

Skills needs and training provision must differentiate between different skills levels (basic, in-depth) and different occupational roles (Managers with / without customer contact, frontline staff, others (including technical specialists)).

Key actors within organizations such as tourism boards, but also individual businesses or service providers can act as leaders actively promoting training as an integral part of development strategies.

6. Delivery of training initiatives

The standard methods of delivering formal training are online and traditional classroom-based training. There are both benefits and disadvantages of these teaching methods. However, simulations and role playing seem to play an increasing role in many training initiatives.

In general, on-the-job training is seen as an efficient way to enhance, particularly soft skills which are rarely taught in the classrooms. As mentioned before, soft skills included skills associated with customer are, self-awareness, self-confidence, empathy, service-mindedness and effective communications.

From the formal, non-formal and informal initiatives surveyed, it appears that a majority of courses are directed to frontline staff. The most frequency mentioned target profession for training are receptionist, waitress/waiters, cooks and housekeeping.

In addition, training is also readily available for professional such as tour guides and chefs. But there is not specifically mentioned availability of courses or training programs for other travel clerks such as those working in attractions.

It seems that for formal training and education provisions, the two most commonly targeted managers are hotel and restaurant sector managers.

7. Financing and sustainability of training programs

In general, the lack of funding for training is one of the greatest challenges when it comes to training for SMEs. SMEs have limited financial resources and the time cost of training may also act as a financial barrier to uptake.

The majority of TVET providers surveyed are fee-paying. These fees range from nominal US\$25.00 to over US\$1,000.00. Evidently, online courses are usually less expensive than face-to-face training. In some countries of The Caribbean however, education, even TVET and tertiary are funded by the government by specific programs and scholarships.

From a demand-side perspective, experts have remarked that giving training for a fee is important. Without a monetary cost relating to training, businesses do not place a high value on it and there is little incentive to attend. However, costs associated with training is often seen as being too high. Evidently, cost considerations are reinforced if the market is misunderstood and there is no motivation at all to even consider it. In addition, the financial crisis has also contributed to business de-prioritizing all sort of training.

There are a wide range of free training courses provided by the national tourism authorities, but there are not a permanent effort since the financial source for those courses is international cooperation and/or a particular project/program.

To understand whether training courses are sustainable it is imperative to also look at the marketing channels and uptake of training. Sustainability relates to the training providers ability to promote the course and encourage uptake. Especially in those situations where training providers are depending on making a financial gain in order to continue providing the training.

The most common marketing channels used across most training providers are email marketing, promotion through tourism schools and social media advertising. Social media channels seem to be important in those cases where marketing budgets are limited.

The in-depth research of case studies shows that many of the training initiatives have difficulties in reaching the right audience. In a similar vein, 70% of the answers to the

online survey indicate that training providers have difficulties in reaching their target audience. Limited budget and narrow networking channels are factors hampering marketing efforts.

The **most effective way of reaching the right target audience is partnering or seeking the support of industry and/or other key stakeholders.** These organization usually possess the right communication tools and channels to reach businesses that the training is developed for.

8. Curriculum and training content

Common themes and modules can be found in the current TVET offer across the Greater Caribbean. Although some contents are adapted to suit local conditions, there are a range of generic learning topics that are present in most of the training and education offer for tourism surveyed. Most training material and course curricula are not publicly available, but only for those enrolled.

9. Supply and demand

Tourism business are seeking short courses that meet specific business needs; hence, qualifications are often a secondary factor. A flexible qualifications structure which enables individuals to achieve over time may be more appropriate.

Learning provision needs to be customized and design to accommodate on-the-job training and packaged in different ways to encourage non-traditional methods of teaching and learning.

Few tourism business have a proactive, structured approach to the identification of training and development needs within the business.

Raising the competitiveness profile of the tourism and hospitality sector of the Greater Caribbean and maintaining a quality product and services for tourism cannot be simple achieved by training employees. Managers, including owner-managers must be encouraged to develop their own skills as employers needs a role model.

F. Cross analysis of Case Studies

We conducted eight case studies, representing the sub-regions of the Greater Caribbean: CARICOM (Barbados, The Bahamas and Jamaica), Central America (Guatemala and Costa Rica), G3 (Mexico), Non-grouped (Dominican Republic), Associated Members (Guadeloupe). The case

studies focus on an overall analysis of the tourism industry, the policies, legislation and general framework of TVET, the qualification framework and competency-based standards for tourism. The cases of study also arises information on different impacts of TVET, their structure and rationale, drivers of success and barriers to uptake.

Each case of study provide in-depth qualitative information on “what works” in the provision of skills development/training for tourism, raise awareness among different stakeholders of the importance and benefits of appropriate TVET, indicate how to overcome some of the gaps in current training provision, and provide the starting point for “best practices” and recommendations that illustrates in a practical way how lessons learned in some countries could inform the development or improvement elsewhere.

Best practices indicators identified are:

1. Innovation

It encompasses a range of different factors such as target audience, approach, funding, resources, tools and objectives with tried and tested results. Most of the innovative approaches relate to how to make the training increasingly interesting for businesses to engage with. This included the case of “The Pedagogic Box” (*La Box Pédagogique*) in Guadeloupe. This case study clearly sets out the case for collaboration among private and public sector in creating awareness of the tourism development importance since the early school and that formal learning plays an important role in increasing and improving tourism sector.

At the secondary level of Jamaican education system students are prepared either to enter the job market or to continue their education at the higher level. The ROSE program introduced in 1993 contained curricula reform for secondary education. The new curricula introduced Resource and Technology subject area that integrates the components of five technical and vocational subject areas.

2. Relevance

It relates to whether the initiative has been able to address a gap in the market and/or whether the initiative has the support of the target audience it is directed to. In general, it seems that all case studies, except one, are performing well on relevance.

HEART Trust (Jamaica) acts as the facilitating and coordinating body for workforce development. It provides access to training, competence assessment and certification to all working age national population and offers career development and employment facilitation services. In Barbados, the Barbados Vocational Training Board (BVTB) organizes a broad range of Programs that are addressed to both employed and

unemployed people seeking to improve their qualifications or gain new ones to increase their chances on the job market.

3. Transferability

A key question in creating a best practice relates to whether the initiatives can be scaled up and whether they can be transferred to other countries. As this research has found, the skills need for hospitality and tourism staff is very similar across the Greater Caribbean and thus, there are valuable lessons that can be learnt from drawing all case studies.

CARICOM countries have worked in creating a regional, harmonized competency-based standards for tourism and has a solid TVET framework and policy, having in mind transferability and work force mobility within the region, while in Central America, Mexico and Colombia efforts have been made in implementing demand-driven training and education programs for tourism.

4. Impact

Virtually no training initiative has incorporated rigorous evaluation mechanisms measuring the impact of individual training initiatives. Most training providers cannot provide measureable impacts of their initiatives/programs. This may pertain to the fact that training providers are not sufficiently embedded in the tourism sector. This relates to who provides the training and why.

In addition, it is imperative to separate between the impact on the availability and the actual uptake of training. Most training initiatives provide a good impact on the availability of training. However, while these organizations/institutions increase the supply of tourism training there is still a significant problem in the uptake and demand for training.

A significant issue is the number of participants these courses/career programs have the ability to reach and the number of participants demanding training. The overall numbers of workers benefitting from training must be put in relation with the overall number employed in the tourism sector and in this perspective the training initiatives/programs are only starting to make a small impact.

5. Sustainability

It relates to the initiative's ability to ensure its own longevity over time. The role of TVET institutions goes beyond the legal framework, it is also related to the efficiency of its operations and the ability to provide appropriate services to the business sector. All

institutions outlined in the cases of study have demonstrated their transparency in managing funds and ensuring good governance.

The financing schemes of TVET have seen a major diversification; once there was two basic models: i) the earmarked taxes and ii) appropriations from the state budget; today, those same mechanisms are being applied, but with a new range of devices: incentives and tax breaks, sales consulting, technical assistance, certification, cooperation agreements, leverage resources, counterpart funds, and co-financing among others.

VII. Key findings

A. About the concept of TVET

- a. The transformations in the field of education and training in Latin America and the Caribbean, that occurred in the last decade, have involved both the concept of training and the organizational forms it takes, which means and includes schemes of financing, its links with the private sector (demand), the process of innovation, development and technology transfer, regular education systems, as well as the relationships with stakeholders that are not only interested but also involved in the design, management, financing and execution of training and educational activities.
- b. In some countries, there is no differentiation between general education and TVET.
- c. The concept of vocational training understood as the orderly transmission and systematic knowledge and skills in order to qualify participants to work in a specific job, during a limited and normally active life stage, is being modified deeply.
- d. Through different national experiences, emerges a concept of training as a permanent fact, in the context of life-long learning; directed not only at the operational levels of the occupational structure, but designed as a vertical offer by productive sectors. Less as a set of knowledge, skills and abilities necessary to perform a specific job, and more as competences of different levels enabling individuals to develop in a variety of occupations, labour situations and positions.

B. About the TVET for the tourism industry

- a. Human resources are key to the performance of every economy, especially for the tourism industry as it is based on human interaction and services. However, only some countries have paid the necessary attention to TVET for the human resources that the tourism sector has at this moment as its labour force and the one that could have in the future.
- b. Structured regional support for TVET related to the tourism and hospitality industry has been weak compared to the assistance available for other economy sectors such as BPOs, financial services, construction, mining, and/or agriculture.

- c. The technical and vocational education and training is being revalorized, new strategies and policies at national and sub-regional level have been developed in order to strengthen it. It is very important then, that the tourism industry take advantage of this movement and have a more active participation.
- d. The most challenging task of TVET is to produce the right type of skilled workforce who are able to match the need of the market demand in a timely manner.
- e. It is commonly held that a large portion of jobs in tourism and hospitality is semi-skilled or un-skilled. This assertion implies that knowledge and skills required for tourism and hospitality jobs can be learned easily and quickly by on-the-job-training without formal training and education, thus, the quality of tourism and hospitality jobs has been questioned due to the low skills profile of jobs. The low skills profile of jobs is also one of the explanations for low quality and low competitiveness of the sector.
- f. The tourism and hospitality industry is dominated by women employees in many countries due that it is seasonal, part-time, and low-paid. This tendency is expected to increase in the future. However, working conditions and level of professionalization must be some issues that need to be addressed to increase productivity and competitiveness of the industry.
- g. Intangible services of tourism and hospitality organizations and intangible transactions are “*tangiblezed*” in the personality, appearance, attitudes and actions of contact employees. As a result, the service outcome and quality is often assessed and determined during the dynamic and often face to face interaction between service providers and customers in tourism and hospitality organization. Frontline contact personnel personify and represent the organization; they are the service and organization in customers’ eyes.

C. About the participation of stakeholders

- a. Business organizations, assume that TVET are key factors that will lead to increasing strategies, improving productivity and competitiveness. Consequently, TVET strategies have gained more central role in the management and execution.
- b. Trade unions have taken the training not only in terms of being entitled to it, but from trying to occupy spaces of participation and negotiation in the topic, and trying to lint it to issues such as employment, wages, working conditions, occupational health and career development.

D. About TVET intervention model

- a. There are three sectors of education in The Greater Caribbean: a) skills sector, b) vocational and technical sector, and c) higher education sector. The first sector reflects the skills qualifications, the second sector relates to the vocational and technical certification systems, and the higher education sector represented by the tertiary sector (colleges, universities and technical/specialized institutes).

- b. Legislation, regulatory bodies, certification systems, standards and curriculum methodology are determinant factors in ensuring TVET relevance to the tourism and hospitality industry.
- c. Best practices on developing and implementing TVET programs and/or strategies for tourism and hospitality industry will help Greater Caribbean countries to evaluate their own TVET systems.
- d. There are a significant number of variations of approaches to TVET. Despite those variations we have found that successfully implemented programs in the Greater Caribbean shared four common characteristics:
 - a. Demand-driven design
 - b. Open access
 - c. Portability of skills
 - d. Continuous improvement
- e. The TVET programs include a demand-led diplomas and short courses offerings, as well as the following:
 - i. Production of all teaching and learning materials and plans for meeting standards.
 - ii. Establishment of linkages, as needed with other educational institutions.
 - iii. Enrolment of youth and adult students.
- f. Since 2002, exists the international framework UNESCO-UNEVOC which assist Member States to develop policies and practices concerning education for the world of work and skills development for employability and citizenship. It also provides information on TVET systems worldwide to learn about trends and challenges.
- g. In most of the countries TVET programs are focus on initial vocational education, but in some countries these include continuing vocational education for upgrading the skills of workers already in an occupation.
- h. Given the diversity of skill development systems, no ones' approach or set of estimated data is able to fully capture the costs, benefits, and financing of TVET.
- i. There are interpretation differences of the gradations in academics and vocational progression. For example, the interpretation of the progression from unskilled to fully skilled seems to vary between frameworks.
- j. The organizational forms of TVET are having a deep change and several innovations have taken place. From a relatively homogeneous institutional structure in the region –strongly monopolized by governmental institution, there is now a great diversity of organization arrangements that involves employers' organizations, unions and civil society.
- k. Countries in the region are facing a major challenge: building and negotiated collective national systems (and eventually, supranational) to lifelong learning, versatile and flexible enough to address a heterogeneous, growing and dynamic demand in harmony with the objectives of economic, social and political development of societies on the continent.
- l. There is an urgent need to develop effective ways and mechanisms to measure competencies and recognize qualifications gained at the workplace and in foreign

countries to facilitate access, learner-cantered advancement and greater mobility of the work force.

VIII. Recommendations

1. TVET for tourism urgently needs the commitment of national tourism authorities so they can assume a unique and key role of coordination within the tourism-education-labour sector in ensuring provision of education for the fast changing of the tourism sector and the labour force.
2. In all countries of the region, employers should be encouraged to play an active involvement and role in TVET.
3. Articulation between TVET and higher education needs to be instituted in many countries in order to improve image, value and status of TVET.
4. Closer liaison, cooperation and partnership between TVET and tourism industry must be institutionalized.
5. Competency-based TVET should be regarded as essential for individual learning, relevance and efficient use of resources.
6. In order for Tourism-TVET to provide life-long learning and up-gradation of knowledge and skills in step with technological advancement; the TVET curriculum for tourism must take into considerations:
 - a. Implications on technological change
 - b. Recognition of prior learning, life-skills, informal and formal training
 - c. Involvement of the industry
7. Networking of institutions of TVET within the Greater Caribbean with a view of sharing experiences and intellectual resources for institutional development is needed.
8. An intent for making equivalent the actual TVET systems within the region will be very helpful.
9. The concept of “Greening Technical and Vocational Education and Training (GTNET)” has been introduced a few years ago to further highlight the need for a holistic approach that ensure TVET’s role in promoting sustainability within the context of “sustainability industries” such as environmental conservation, cultural heritage site preservation, and economic improvement. Since this approach responds to the programmatic areas that comprises the STWP indicative of the specific interest and focus for training and development and the interest in contributing to skills building and knowledge enhancement of MSMEs, women, youth and rural, ethnical and indigenous communities it is recommended to explore the model in-deep to evaluated replication or adaptation to the Greater Caribbean.

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