

OVERVIEW THE STUDY AT A GLANCE

Six countries. One question: *how sustainable* is tourism work?

D2.2 is an exploratory, mixed-methods study of the *social and environmental sustainability* of tourism workplaces across the six RESKILL partner countries. It maps workforce challenges, skills priorities, and the gap between what employers recognise and what they implement.

METHODOLOGY

A mixed-methods design

Quantitative survey triangulated with four qualitative methods conducted in parallel by every partner institution.

170

Tourism SMEs surveyed

Across 6 partner countries · Jun–Oct 2025

35

Skill items rated

Green · Digital · Soft, on a 1–5 scale

6

Partner countries

FIN · GER · ITA · LIT · POL · ESP

3

Institutional clusters

Nordic-Continental · Southern · Central-Eastern

QUALITATIVE PROGRAMME — PER PARTNER

P	PESTEL analyses — macro-structural context	×6
F	Focus groups — 6–8 participants, 60–85 min	×6
I	In-depth interviews — policy-oriented experts	12–18
W	Foresight workshops — future worker scenarios	×6

01 / 05 THE SKILLS HIERARCHY

Soft skills *top* the ranking — everywhere.

Across six European tourism labour markets, employers rate soft competencies highest in *every single national sample*, with no exception. Digital follows. Green skills come last.

The soft-digital-green ordering holds in **every country without exception** — a rare cross-national consistency across six very different labour-market regimes, from Finland to Poland to Spain.



BY COUNTRY, BY DOMAIN · MEAN IMPORTANCE SCORE



02 / 05 THREE INSTITUTIONAL CLUSTERS

Six countries, *three* institutional logics.

The six partner countries are grouped into three institutional clusters following *Varieties of Capitalism* and welfare-state traditions. Each cluster shapes the policy instruments employers can use, the labour-market regulation they operate under, and the nature of their workforce challenges.

CLUSTER I

Nordic-Continental

Finland n=10

Germany n=40

50

Total respondents

62%

Lack of qualified candidates (GER)

REGIME High collective bargaining coverage, strong VET traditions, regulated employment standards.

CHALLENGE Acute labour shortages and demographic ageing; structural skills gap rather than cost competition.

RESPONSE High demand for **digital and structured training**; sustainability practices most developed.

CLUSTER SIGNATURE

Mature labour markets meeting the workforce ceiling.

CLUSTER II

Southern European

Italy n=23

Spain n=34

57

Total respondents

80.6%

Permanent contracts in Spanish tourism

REGIME Mediterranean employment patterns: high seasonality, geographic concentration, intense international demand.

CHALLENGE Over-tourism pressure, sector image deficit, retention vs. seasonal volatility.

RESPONSE Spain leads with labour-reform and **emotional salary** articulation; Italy lags on training and certification.

CLUSTER SIGNATURE

High-volume destinations rewriting the employment contract.

CLUSTER III

Central-Eastern European

Lithuania n=51

Poland n=12

63

Total respondents

67%

Salary mismatch as challenge (POL)

REGIME Rapid economic convergence with Western European income; lower collective bargaining coverage.

CHALLENGE Wage competition and reliance on Ukrainian and other immigrant workers; image deficit of the sector.

RESPONSE Highest soft-skills priority (Lithuania 4.40); green skills under-prioritised (Poland 3.02 — lowest).

CLUSTER SIGNATURE

Convergence economies absorbing rapid demographic shifts.

03 / 05 THE RECOGNITION-IMPLEMENTATION GAP

Employers know *what*. They can't deliver *how*.

A single tension cuts across all six countries: high awareness of skills priorities and sustainability practices, low capacity to invest in training and certification. The gap is not in *intention*, but in *resources, time and organisational scale*.

RECOGNITION

What employers *say* matters

Rated importance of priority competencies and adopted operational practices.

Soft skills importance
cross-country mean (1–5 scale)

4.18

Waste reduction practice
Germany — highest sample

75%

Work-life balance initiatives
Spain (n=34)

70.6%

Sustainability is a guest expectation
qualitative evidence, all countries



FROM TALK TO
delivery
— A STRUCTURAL GAP



THE BOTTLENECK IS
CAPACITY, NOT INTENTION
TIME · COST · SCALE ·
ADMIN

IMPLEMENTATION

What employers *actually* invest

Training, formal certification, and structured workforce development.

Training investment
highest in sample (Spain) — no country exceeds 29%

29%

Green certification held
Germany — highest sample

22.5%

Specific health & wellbeing programmes
Spain (n=34)

17.6%

Lack of time blocks training
cited by 33–80% of employers across countries

62%

One strategy *converges*. The others *diverge*.

STAFFING STRATEGIES

What employers actually do

Share of respondents per country adopting each strategy. Three patterns emerge from the cross-country data.

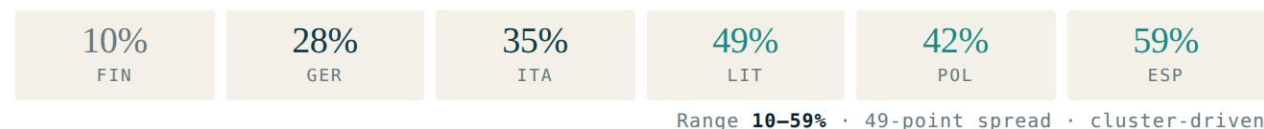
Flexible working conditions

— CONVERGENT



Wage increases

— DIVERGENT BY CLUSTER



Training investment

— LOW ACROSS ALL



Flexibility is the universal answer; wages and training fragment along cluster lines. Closing the gap requires structural instruments — sector-level training delivery, accessible certification, and platform infrastructure — that no single SME can build alone.

IMPLICATIONS FOR POLICY & THE RESKILL PLATFORM

What can close the gap

Four design principles for the RESKILL platform and EU-level workforce instruments.

01

Sector-level training delivery

Per-enterprise cost is the dominant barrier. Cost-sharing through industry associations or public-private consortia unlocks scale that no single SME can fund.

02

Micro-training embedded in operations

5–15 minute modules around concrete service scenarios. Time, not motivation, is the bottleneck — 62% cite operational time pressure as a training barrier.

03

Low-burden certification pathways

Most SMEs already meet operational sustainability criteria; the obstacle is administrative capacity. Streamlined certification converts existing practice into formal recognition.

04

Soft skills first, green & digital integrated

Soft competencies are the sequencing foundation. Layer green and digital onto adaptive, customer-facing capabilities rather than treating them as separate domains.

05 / 05 FROM PRIORITIES TO PROFILES

Today's priorities → tomorrow's *profiles*.

01 TODAY – PRIORITY SKILLS BY CLUSTER RESKILL MS3 NATIONAL SURVEYS · TOP RATINGS

Nordic- Continental FIN · GER	SOFT	Adaptability to change , networking & stakeholder collaboration, leadership in multicultural teams
	DIGITAL	E-commerce & booking systems (rated 4.90/5 in Finland), CRM, social media analytics
	GREEN	Environmental awareness , resource efficiency & waste management, renewable energy
Southern European ITA · ESP	SOFT	Adaptability to change , empathy & emotional intelligence, multilingual proficiency
	DIGITAL	Online reputation & review management , data analysis (4.65 in Spain), CRM systems
	GREEN	Resource efficiency & waste management , environmental awareness, renewable energy
Central- Eastern European LIT · POL	SOFT	Creativity & innovation , empathy & emotional intelligence, conflict resolution
	DIGITAL	Social media & e-commerce , online reputation, digital marketing & SEO
	GREEN	Sustainable event management , resource efficiency; Poland the lowest green priority (3.02)

The skills employers prioritise today align with the worker profiles emerging from the foresight workshops in Finland, Germany, Italy and Spain. The bridge between current demand and future readiness is real — if training architecture follows the same logic.

02 TOMORROW – FUTURE WORKER PROFILES FORESIGHT WORKSHOPS · LAUREA, KIEL, BARCELONA

Digital Service Specialist

KIEL · GERMANY

Combines commercial digital fluency with guest-facing service design; the front-line role for the digitised hospitality experience.

Soft-skills foundation

E-commerce & CRM

Data literacy

Service design thinking

Sustainable Experience Curator

KIEL · GERMANY · CROSS-SCENARIO

Translates sustainability commitment into guest-perceivable experience; bridges operational practice and certification readiness.

Soft-skills foundation

Environmental awareness

Resource efficiency

Storytelling & comms

Multicultural Team Leader

KIEL · BARCELONA · LAUREA

The convergent profile: identified in German, Spanish and Finnish workshops alike. Manages diverse, often migrant, teams in high-pressure operations.

Soft-skills foundation

Emotional resilience

Conflict resolution

Language & cultural integration

The *no-regrets* stack

Every profile rests on **soft skills + a digital customer toolkit + green essentials + modular micro-credentials** — the foundation identified across all foresight workshops.