



**Private Sector Federation
(PSF- Rwanda)**

FINAL REPORT

SKILLS ASSESSMENT OF TOURISM AND HOSPITALITY SECTOR

January 2022

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ACRONYMS

| | |
|----------------------|--|
| CRM: | Customer Relationship Management |
| HR: | Human Resources |
| EAC: | East Africa Community |
| <i>UNWTO:</i> | United Nations World Tourism Organization |
| TCP/IP: | Transmission Control Protocol/Internet Protocol |
| SCP: | Sustainable Consumption and Production |
| UNESCO: | United Nations Educational, Scientific and Cultural Organization |
| ITU: | International Telecommunication Union |
| WTM | World Tourism Market |
| WTTC | World Travel & Tourism Council |
| SDGs: | Sustainable Development Goals |

EXECUTIVE SUMMARY

The national strategy for transformation (NSTI, 2018), stipulates that Rwanda is ambitious to become a competitive private sector and service-led economy equipped with knowledge that will accelerate the generation of about 1.5 million decent jobs by the year 2024. Among the key identified economic sectors to drive this ambition are tourism and hospitality not forgetting Agro-processing, Horticulture, Manufacturing, Value-addition of Minerals, Touring & Transport, and Creative Art. This will be achieved by addressing the energy bottleneck and the government through the National Investment Policy and the Public-Private Partnerships. The National Investment Policy has also led to infrastructure development especially the Bugesera airport construction, and the development of Meetings, Incentives, Conferences, and Exhibitions (MICE) initiatives which have attracted huge foreign direct investments to construct hence the development of the sector.

The overall objective of the study was to assess the skills requirements of the tourism and hospitality sector in Rwanda over the period 2020-2030 and to formulate policy recommendations to ensure that the future skills requirements in the sector can be addressed by the end of NSTI.

The skills assessment has revealed that key occupations need professional skills for the sector to perform and compete regionally and internationally. Those occupations include Event Management and Operations, Assistant Research Executive, Assistant Event Executive/Assistant Project Executive, Assistant Event Operations Executive, Research Executive, Event Executive/Project Executive, Event Operations Executive, Exhibition Producer/Conference Producer/Meeting Planner, Event Manager/Project Manager, Event Operations Manager, Exhibition Director/Conference Director/Meeting Director, and Project Director. However, Rwanda lacks most of these professional skills in the entire sector.

The study proposed a further public-private partnership, especially in curriculum development, increased on-the-job training, and increased and improved mentorship programs that enhance skills development and exchange programs within the country and outside Rwanda for knowledge transfer. There is also a need for a further and comprehensive skills audit in the sector to identify existing skills against what is required.

There is also a need for a comprehensive skills audit in the whole country to identify so as to have a clear picture of what the country possesses in terms of skills against what is required. More so, undertaking employer skills survey regularly is necessary to constantly demonstrate the skills that are in most demand as well as the presence of shortages making employers understand the rationale for providing and investing in the skills development of their workforce.

Elaboration of a modern academic and TVET curriculum with courses and learning outcomes that can fill the skill and knowledge gaps of tourism sector human resources as identified in this study.

Providing job retraining and enabling individuals to learn marketable new skills throughout their lifetime will be a critical challenge and for all subsectors, the central challenge. Midcareer retraining will become ever more important as the skill mix needed for a successful career changes. Tourism and Hospitality Business can take a lead in some areas, including on-the-job training and providing opportunities to workers to upgrade their skills.

Finally, identifying a prospective international partner academic program to engage within the development of the curriculum. The national occupational standards and certification need to be established. These are documents describing the skills, knowledge, and attitudes necessary for competent performance in a specific tourism occupation. Standards are a job analysis or job profile that contains criteria-based performance statements, knowledge requirements of the job, and contextual.

CHAPTER ONE: INTRODUCTION

1.1 Background and Context

Tourism as an economic powerhouse is the third-highest world category in export earnings in 2015, representing 10% of world GDP, 30% of services exports, and one (1) out of every 10 jobs in the world. Sustainable tourism is firmly positioned in the 2030 Agenda. Achieving this agenda, however, requires a clear implementation framework, adequate financing, and investment in technology, infrastructure, and human resources

Moreover, the government of Rwanda's (GoR) ambition is to transform the economy into a knowledge-based and service-led economy driven by the tourism and hospitality sector which will move her Labor force from subsistence agriculture into the productive service sector aiming at turning the country into an upper-middle-income country by 2035, and a high-income economy by 2050 (NSTI). For the country to have a sustained and an inclusive growth that will be realized from this impudent ambition, innovation, integration, agglomeration, as well as competition should be the key driving forces thereof focusing on especially human capital development, export dynamism and regional integration, a well-managed urbanization, a competitive domestic enterprise, a modernization agricultural, as well as a capable and accountable public institution.

According to RDB annual report (2020), the tourism sector's revenue generation dropped sharply from USD 498 million in 2019, to USD 121 million in 2020 and the decline is attributed to the impacts of the global Covid-19 pandemic. Regarding the hospitality sector, (MICE) the revenue generated was USD 4 million in 2020, compared to USD 66 million in 2019.

Furthermore, the national strategy for transformation (NSTI, 2018), Rwanda is ambitious to become a competitive private sector and service-led economy equipped with knowledge that will accelerate the generation of about 1.5 million decent jobs by the year 2024. Among the key identified economic sectors to drive this ambition is tourism and hospitality Incentives, Conferences, and Exhibitions (MICE) initiatives which have attracted huge foreign direct investments to construct hence the development of the sector.

1.2 Rationale of the sector specific skills assessment

The prime purpose of the skills assessment in Tourism and hospitality sector is to critically look into the required skills to effectively drive the sector to the competitive level and deliver within the transformed business environment assess skills gaps, identify ways to bridge them, and draw some recommendations that can be implemented by different stakeholders in the sector in order to be able to meet regional integration policy and competitive edge in such a way that the capacity building is guided and responsive to the market demands and contribute to private sector's growth. Thus, the Private sector will contribute to Rwanda's economic transformation and compete to the international market.

I.3 Objectives and Scope of the Assignment

The overall objective of the skills assessment in tourism and hospitality sector is to assess the skills of the tourism and hospitality Sector current and the future, and to formulate recommendations to ensure that the future skills requirements in the sector can be planned for taking into consideration implementation of NSTI provision for the sector by:

- Providing information on the current performance of the tourism and hospitality, its workforce and the demand and supply, shortage, gaps and required of skills in sector expected performance.
- Assessing the drivers of change impacting the tourism and hospitality and the relevant consequences for future skills needs;
- Identifying areas to be prioritized for action in the short, medium and long term
- Forecasting the skills for the tourism and hospitality Sector up to 2030 based on short, middle and long-term.

I.4 Methodological Approach

To conduct the tourism and hospitality sector skills assessment, the study was conducted using different methods and approaches.

I.4.1. Approach

One-to one consultation and telephonic discussion with key stakeholders in tourism sector including: Tourism chamber, tourism associations, tour operators, hotels, restaurants, Bars managers and owners, as well as transport company managers. However, focus group discussion could not be held due to Covid 19 pandemic that soon emerged. PSF senior Staff were also consulted and provide solid information on the sector.

I.4.2. Method used in data collection

A desk review was undertaken consulting relevant documentation on the tourism and hospitality sector, including a review of skills assessments previously conducted. The review also covered tourism and hospitality statistics, reports, academic literature, articles on skills assessment and capacity building as well as reports by international bodies. In addition, qualitative information was also collected via interviews with senior managers, heads of department in a representative of tourism and hospitality companies. (see Annex I).

Quantitative and qualitative analysis was carried out through Monkey survey, comprising questionnaire covering companies' profiles, skills specifications, qualifications at key occupational categories and experience. The skills assessment data results were then processed and analysed to form the basis of the current report, which highlights the key findings and recommendations.

For documents consulted (see Annexes I):

1.4.2.2 Key Informant Interview

Key informants were identified in close collaboration with the client (PSF) from relevant stakeholders and/or members regarding the assignment. (see *annex_I*) for a conversation aimed at helping the consultant team to gather relevant information about the subject under the study.

a) Response Rate

Table I: Response rate as per category of Key Informants Interview

| Category of Key Informants | Expected Institutions/companies | Response Rate (%) |
|-------------------------------------|---------------------------------|-------------------|
| Kigali Serena | 1 | 100 |
| Marriot Kigali Hotel | 1 | 100 |
| Radisson Blue | 1 | 100 |
| One and Only Nyungwe | 1 | 100 |
| Mille Colline Hotel | 1 | 100 |
| Sabyinyo Sylver back Lodge | 1 | 100 |
| Golden Tulip Bugesera | 1 | 100 |
| Five-to Five Hotel | 1 | 100 |
| Heaven Restaurant & Boutique Hotel | 1 | 100 |
| Yambi Guest House | 1 | 100 |
| Cozy Safari | 1 | 100 |
| Nobleza hotel | 1 | 100 |
| Kigali Castle Bed & breakfast | 1 | 100 |
| Olympic Hotel | 1 | 100 |
| The Next | 1 | 100 |
| Lebanon Hotel | 1 | 100 |
| Pepon Living Spaces | 1 | 100 |
| Mythos Boutique Hotel | 1 | 100 |
| Dove Hotel Kigali | 1 | 100 |
| Wild Tour Rwanda | 1 | 100 |
| Hermos life Tours and Travel Rwanda | 1 | 100 |
| Explore Rwanda | 1 | 100 |
| Primate Safari | 1 | 100 |
| Jombo Travel & Tour Agency | 1 | 100 |

| | | |
|---------------------------------|----|-----|
| Volcano Safari | 1 | 100 |
| Eco Tour Rwanda | 1 | 100 |
| Rwanda Gorilla Travel | 1 | 100 |
| Gorilla Adventure Tours | 1 | 100 |
| Rwanda Eco-Company Tours | 1 | 100 |
| Total | 29 | 100 |

Source: Customized from primary data collection, 2020

Sampling Method

In terms of sampling, stratified random sampling was used to maximize information accuracy. This consists of dividing the sample population into smaller groups, or strata, based on shared characteristics. Thus, hotels were selected based on their categories such as number of stars, location looking at rural, secondary city, satellite city and Kigali city. The same was applied to tourism agencies, and other services providers in tourism and hospitality sector.

CHAPTER TWO: TOURISM AND HOSPITALITY SECTOR PROFILE IN RWANDA

2.1 Introduction

The government of Rwanda (GoR) has embarked on its development agenda that aimed at transforming the country into a middle-income country by the year 2020, since 1998. The country also anticipates transforming the economy targeting to have an upper middle-income and a high-income country by 2035 and 2050 respectively. The Vision 2020 (Vision 2050) are being implemented through a medium-term planning framework for successive five or seven-year periods. The National Strategy for Transformation (NST-I) (Republic of Rwanda, 2017) covering the period 2017 to 2024. It also aligns with Agenda 2063 (African Union, 2015), a strategic framework for the socioeconomic transformation of Africa over the next 50 years through existing initiatives in the continent for growth and sustainable development.

The elaboration of the long and medium-term strategies is an opportune moment for the full integration of global and regional planning commitments, including: The Sustainable Development Goals (SDGs), African Agenda 2063, and the East African Community (EAC) Vision 2050 (EAC, 2015). According to NST I, the service sector and particularly the tourism and hospitality sector are crucial sectors and potential drivers of future economic growth. The most tangible opportunities in the tourism and hospitality sector is the construction new Bugesera airport, MICE infrastructure especially convention centre, Visit Rwanda program, rehabilitation of the national parks, the implementation of the Kigali City Master plan and secondary cities that encompasses a broad vision and guidelines for the entire city serving as the basis for more specific planning at the District's secondary cities and the Central Business District (CBD). This presents sustainability in land use, infrastructure and economy progress that will also serve as tourist attractions.

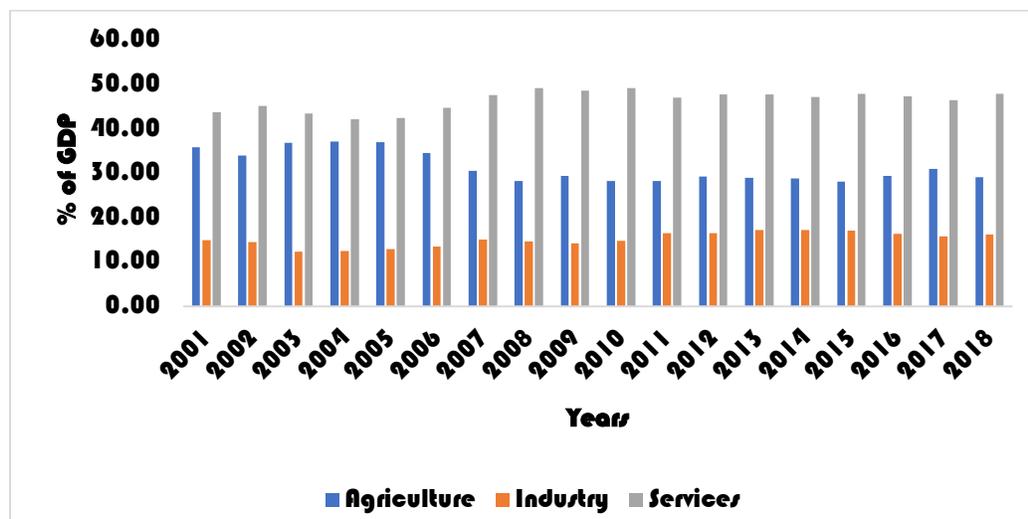
2.2 Tourism and Hospitality Sector Profile

According to Odunga, Geoffrey, and Mark, (2019), measuring economic impacts of the country's tourism industry is critical to monitor its progress towards meeting planned socio-economic goals. However, the authors highlighted limited attention regarding rigorous analysis to assess its initial impacts. This is because labour income, output and value-added multipliers indicate a strong linkage between the tourism and the entire service sector, whereas the employment multiplier shows a robust linkage of the sector to the agriculture sector.

As per Odunga, Manyara, and Yobesia, (2020), despite the importance of the tourism sector for a low-income developing country like Rwanda that aspires to transform her economy into a service-led, industry does not exist as a distinct entity in a country's national accounts causing

difficulties in assessing its role. However, their results indicate that the sector (tourism) generated an estimated RWF 197.5 billion yet its initial direct contribution was estimated at RWF 120 billion.

Figure I Sectoral comparison in the contribution as a % of Rwanda's GDP since 2001:



Source: Author's computation WDI, 2019

Statistics given in **Figure I** shows that between 2001 and 2018 the share of the service sector to GDP has been maintained at less than 50%. The percentage share of Agriculture dropped from 35.74 % to 29.04% for the same period. There was an improvement in the Industry sector's share to GDP from 12.9% in 2001 to 16.23% in 2018.

World Bank development indicator datasets showed that despite improved performance in the service sector as explained from **figure I** above, the share of employment as a percentage of the sector's total employment was less than that of agriculture (**see table 2**).

Table 2: Cross-sector comparison in Employment generation as % of Rwanda's Total Employment

| Sector | Employment as % of Total Employment |
|--------------|-------------------------------------|
| Service | 24.84 |
| Agriculture | 66.06 |
| Industry | 9.10 |
| Total | 100 |

Source: Author's computation WDI, 2019

Based on Table 2, above, it is observed that the Agriculture sector takes the largest share of employment as % of Rwanda's total Employment with 66.06% followed by the Service sector with 24.84% and the last being the Industry sector with 9.10% (World Bank, 2019).

According to Africa Fortune, (2012), the sector was characterized by it being the country's largest source of export earnings and the Rwanda's tourist attractions include Mountain gorillas, national parks, museums, Lakes, culture and wonderful scenery.

In addition, the sector's competitive advantage includes the following;

- Unique assets that offers tourists with a one-of-a-kind journey home to one third of the world's remaining Mountain Gorillas, one third of Africa's bird species, several species of primates, volcanoes, game reserves, resorts and islands on Lake Kivu, graceful dancers, artistic crafts and friendly people.
- A Safe and quick to get around due to its short distances to designated destination.
- Its location being in the heart of central and East Africa which the easy access of these nations like Democratic Republic of Congo (DRC), Kenya, Uganda, Tanzania, and Burundi.
- Accommodation in Rwanda ranges from the more luxurious hotel suites in the city to the more Rustic Mountain and safari lodges found in and around Rwanda's National Parks. There are also mid-range hotels aimed as much at local business people as they are at tourists. Furthermore, backpackers' lodges and campsites are also available with all accommodation standards.
- The country is rich with a culture that has ancient folk of music and dances and this usually attracts visitors.

Furthermore, according to Business Destination (2019), Rwanda has surprisingly undergone through amazing transformation to become Africa's top destinations for business events. This is being attracted by its lively capital city (Kigali), that makes the country a regional and international conference hub given a world-class conference facility namely Kigali Convention Centre, in which Radisson Hotel Group is located. And again, the country's MICE sector is supported by excellent business infrastructure as mentioned above coupled with its air transport (**Rwandair**) that connects the nation to over six other international airlines from Africa, Europe and Asia have flights into Kigali, including Qatar Airways, Turkish Airlines, KLM and Brussels Airlines. Rwanda also envisages to expand its airport service by constructing Bugesera International Airport that will expand the sectors' services and routes leading to Rwanda achieving its tourism targets.

2.2.1 Investment by size & sector per province: Accommodation & Food Services.

- **Kigali City Province:** accommodation & Food Services (US\$ 189 million/16.7%)
- **Western Province:** Accommodation & Food Services (US\$ 15.6 million/ 46.4%)
- **Southern Province:** Not mentioned
- **Northern Province:** Accommodation and Food Services (US\$ 4.5 million/93.2%)

- **Eastern Province:** Not mentioned [1]

2.2.2 Tourism & Hospitality principal activities

The list below indicates main principal activities in the Tourism and Hospitality sector spread across the country. And the two dominant principal activities in the sector are in the Hotel and Hospitality/Accommodation, consisting of 29.4% of the businesses in the sector, while the Restaurant and Mobile Food service consists of 29.1%, of the entire sector.[2] Moreover, there are principal activities which highly contributes to country's economy are found in the sector and subsectors are as below:

- Passenger Air Transport (Office in Rwanda)
- Hotels and Hospitality/Accommodation
- Restaurants and Mobile Food service
- Tour and Travel agency
- Tour guides
- Event Management Activities
- Creative, Arts and Entertainment activities
- Heritage Activities Museums Historical sites
- Operation of Sports Facilities
- National Parks Management

2.3 Tourism and Hospitality Sector Occupational Profile

The results of the study by Odunga, Geoffrey, and Mark, (2019), indicate that internally, the Rwandan tourism demand created about 29% of total jobs, and generated 9.7% of labour incomes, 11.1% of total value addition and 12% of national output in 2014. Therefore, increasing internal tourism demand in Rwanda will lead to higher labour income, increased output and value addition and higher employment in agriculture and other associated sectors. This study shed lights on predominantly informal sector of Rwanda's economy especially with respect to the domestic tourism market.

According to RDB, (2021), the tourism and hospitality sector is one of the country's critical drivers of economic growth. This evidenced by the fact that sector's contribution to the country's GDP was approximately 13% in the same year which was higher than world's entire share (10.4%), higher than sub-Saharan Africa's share (7.1%), as well as higher than that of EAC countries' especially that of Kenya (9.7%); Tanzania (9.0%); Uganda (7.3%).

¹ RDB Annual Report 2020

² <http://www.lmis.gov.rw/scripts/publication/reports/Tourism>

Furthermore, the total sector's employment by the sector level for accommodation and food service activities. It is clear that the accommodation and food service activities share of employment dropped from 96,982 in 2019 to 91,495 in 2020. It should also be noted that the male employees still dominate their female counterparts for accommodation and food service activities whereby while the number of men reduced from 49,085 in 2019 to 45,034 in 2020, their fellow female counterpart dropped from 47,896 to 46,461 in the same period (the labour force survey datasets of November 2020).³

However, according to RDB, report (2021), the total employees in the tourism and hospitality sector which is dominated by the food and beverage, transport and accommodation has improved steadily over the past 5 years, and has accounted approximately 90% of the total created employment opportunities. This however, did not depend on any improvement in skills, it's rather market demand and if skills were added to it, improvement could have been even better.

³ *Source: NISR, 2020*

CHAPTER THREE: DRIVERS OF CHANGE AND THEIR SKILLS IMPLICATION

3.1 Introduction

In modern day of tourism and hospitality management of uncertainty in the environment has become a vital part in building the sector. The increasing speed of changes in the field of tourism and hospitality as dynamic. Thus, the **drivers of change for the sector** create movement in the operation of each sub-sector, which can be reduced to a chain of related services. Thus, a driver can influence multiple aspects of the sector.

3.2 Drivers of change and their Skills Implications

3.2.1 Policy regulation

The success of tourism industry relies more on the government policies that influence private investment to take a lead in that particularly. Despite the intended support by the government policies, some challenges may hamper private investment in the tourism sector skills development within the sector are not available to level of satisfaction and expectation of external investors. Other challenges include increase in price of private land for tourism infrastructure development; shortage of funds and human resource capacity gap at sector levels; uncertain synergy among private sector tourism actors and local communities in joint tourism ventures. There is need therefore, to make improvements in these policies to facilitate private investment in tourism skills development. policies institutions regulating the tourism and hospitality, to put more efforts in developing skills for tourism industry. In so doing, there will be an influence changes in tourism industry by enacting government decisions that influence investments in tourism sector.

According to Scrivens, (2007), for tourism and hospitality to deliver an anticipated and improved service associated with these changes, there is a need to ensure that the reformed government incentives while maintaining consistency in their safe delivery and access. This is because the regulation theory attempts to explain major changes in national economic structures which examines their underlying systems for capital accumulation (Goddard, 2005).

3.2.2 Funding and investment

For the sector's growth and development which will subsequently enhance the country's economic growth that will generate and seeped up job creation depend entirely on availability of sufficient funding, thus, there is a need for funding provisioned by the policy commissioning all the sector actors to avail it for skill development investment. Nevertheless, funding and investment is critical in skills development for specific occupation categories as they emerge.

3.2.3 Shift from regional to global competition

The rationale and advantages for moving from local, and regional partnerships of local authorities and businesses to global sphere is that those who have the greatest understanding of local issues are best placed to determine where opportunities are and priorities and undertake activities to drive profitability growth and create jobs at a larger scale. Fyall, and Garrod, (2005), pointed out that, for International tourism to be key agents of economic development in industrializing countries, in the twenty-first century, economies with tourism-based must adopt approaches where they have comparative advantages others. However, competitiveness phenomenon in this sector sought to be a multi-dimensional and difficult idea.

3.2.4 Demographic change

According to Baum, (2010), demographic change over time is likely to impact the workforce especially in the tourism sector. This is because as the cities grow and new areas developed, people tend to move from rural to town, from inner rural villages to the cities and towns. This is likely to influence tourism and hospitality sector as there will be more innovation and diversification of tourism's products such as cultural foods, tourism sites of art and crafts. Therefore, aging of some skilled tourism agents will need to be smoothly replaced by younger groups who need to learn a lot from the older ones hence skills in the sector will need to be increased thereof. It is more advantageous to take a learner-centred approach to training, that ideally would be negotiated and co-constructed through recognition of the older worker's prior experience and potential to contribute to the younger employees in the sector.

3.2.5 Imported skills

Certain tourism and hospitality sub-sectors within the sector, most notably those working in accommodation and food and beverage services, employ a substantial proportion of foreigner workers. These workers fill a variety of roles from entry level positions requiring limited experience (for example bar staff, Customer Care etc) to highly skilled positions (such as specialist chefs, hotel managers, Food and beverage planners etc...) with a uniqueness of experience and ability not commonly found in the sector will decrease as more local graduates are coming out to take over. This change can disrupt the momentum of the services delivery and may cause a drift in what the market was used to and compare and contrast to measure the changes.

3.2.6 Consumer preference

Particularly in relation to hospitality, there is a growing customer demand for local produce. The provenance of food is an important issue which is leading restaurants towards sourcing good quality ingredients from local suppliers with the environmentally conscious consumer being more concerned about 'food miles' (the carbon footprint associated with importing foodstuffs from further abroad).

Evidently, within tourism, holidaymakers are more aware of the pollution caused chemicals in foods. Coupled with other factors which will lead to more people taking holidays in places that are tending to be organically farming and having strong measure in policies to reduce pollution of all sorts. ***The sector will need skilled personnel who are equipped with research skills in those possible customers' preferences.***

Lacher, (2012), highlighted that, demand for sustainability-oriented vacation options is on the rise as consumers become more aware of the negative effects that their travel may have on various destinations. Using the serious tourism concept to determine whether it a valid and useful framework for analysing tourists' decision making, it was found out that consumer most prefer certifications that are focused on environmental protection and that more stringent certification provide little additional utility to consumers. The six-fold attribute structure of serious tourism orientation framework was found valid and that the serious tourism does affect consumer behaviour indicating that it is potentially a useful framework thereof. However, the approach (serious tourism) was not found to have an effect on consumer preference for sustainable tourism certifications though the travel motivations did have an effect on consumer thereof.

3.2.7 Economics and globalization

The economic downturn has affected and will continue to affect the hospitality, tourism and other related businesses. The effects are being felt in a variety of ways but, generally, declining the customer base, both in leisure and business, reduced consumer expenditure due to reduced purchasing power, exchange rate volatility, rising costs (especially for example for energy, food, compliance with new legislation such as licensing laws) and decrease in wages. All these will affect the sector directly and indirectly.

There is also more to the globalization of tourism than cross-border flows of customers and purchasing power. Outsourcing, transnational ownership structures and investments, cross-border marketing collaborations, the purchase and sale of knowhow, and the free movement of Labor are developments not confined to manufacturing alone, but are also highly relevant for the **modernization of tourism for skills development is paramount** (Hjalager, 2007). In addition, the effects of economic globalisation analysed in the context of host destination refer to economic growth, foreign direct investment, marketing and promotion effects, impacts of information and communication technologies and dependence on tourism. For tourism operations the most visible effects of globalisation are reflected in the rise of multinational companies, their power and influence on form and scale of tourism development, technology transfer, employment effects, product and quality effects as well as crowding out effects. Tourists as members of the growing 'leisure society' have benefited from increased social connectedness and creation of new transformative holiday opportunities (Dwyer & Čavlek, 2019)

3.2.8 Technological change

Digitalisation is changing the way people live, work, and travel, and has opened up new opportunities for tourism businesses to compete in global markets. The impact of digitalisation on tourism is vivid and has to be adopted for the sector to compete.

Basically, technological change can be described as total factor productivity which is also the share of production not explained by the number of inputs thereof formally capital and Labor. In other words, it is that output which is not a function of the production input especially the new way of doing things (Solow, 1957). Moreover, technology and innovation boost competitiveness and activate the change of resources from less to more productive activities thus enhancing structural transformation for the entire economy (AfDB, 2019).

Advancement in technology impacts the whole of the hospitality, tourism sector since it uses new technology to promote and market business or add value to aspects of services. six key areas of technology used within the hospitality industry which have an effect on productivity and the skills of the hospitality workforce in particular include:

Online booking, Online training, Customer Relationship Management (CRM) systems, Management information systems, Human Resources (HR) and electronic/mobile learning systems, Front desk technologies, Food preparation and cooking technologies. Skills need to be developed for the sector to cope with all these technologies and those that are emerging continuously and fast.

Through new technology and social and economic ratings (e.g. social media platforms like Facebook, Twitter, blogs) customers have the ability to share information and research ratings on destinations, quality of service in hotels and restaurants and environmental and social conditions. A number of hotels (e.g. Marriott Hotels and Resorts, Ritz Carlton Hotels, Hyatt Hotels and Resorts) have strengthened their brand image and communicate directly with their customers by posting links to a press release or promoting a new package through Twitter.

Leading-edge digital technologies are not prevalent in most of economies. Tourism and hospitality sector need a continuous adaption to technological trends. However, such technologies are of no use without the appropriate skills in place to transform them into digital intelligence and economic opportunities.

4. Drivers of change and their scale

Table 3: Scale of different drivers

| Nature of driver and impact on skills | Current impact (low, medium, high, variable) | Future impact (low, medium, high, variable) | Impact on demand for skills | Which industries will be affected |
|--|--|---|---|---|
| Policy Framework | High | Could be high if no provisions for skills development financially and programmes planning | Global competitiveness will require strong commitments and effectiveness of the collaboration between all stakeholders | All |
| Funding and investment | High | Variable | More effective marketing strategies for tourism. Continued funding for leisure facilities and outdoor Education opportunities. | Tourism, leisure |
| Shift from regional to global competition | Medium | Low | Monitoring of policies provisions and international conventions implementation | Tourism, hospitality sub-sectors |
| Demographic change | | | | |
| Migration | Medium | High | languages skills. | Accommodation, food and beverage service, tourism |
| Environmental change | | | | |
| Consumer preference | High | High | Customer service skills. | All |
| Economics and globalization | | | | |
| Declining customer base | High | Medium | Better marketing strategies and higher value product offer. Diversification into other business areas. Better customer service. | All |
| Reduced consumer expenditure | Medium | Low | Customer service levels to increased repeat custom. | All |

| Nature of driver and impact on skills | Current impact (low, medium, high, variable) | Future impact (low, medium, high, variable) | Impact on demand for skills | Which industries will be affected |
|--|---|--|---|---|
| | | | Offering innovative services to secure custom. Reduced training expenditure. | |
| Fluctuations in exchange rates | Medium | Variable | Cultural awareness to effectively serve foreign customers, encouraged by the exchange rates. | Accommodation, food and beverage service, tourism |
| Rising costs | High | Medium | Appreciation of energy efficient technologies. Reducing wastage. | All |
| Technological change | Low | High | With specialist technology related solutions, high level skills will be required. With day-to-day technological updates, most will adopt these without difficulty. | All |

Source: customized data analysis from skills assessment with <https://www.oecd-ilibrary.org/> findings

CHAPTER FOUR: SKILLS STATUS IN RWANDAN TOURISM AND HOSPITALITY SECTOR

4.1 Introduction

The country's aspiration is to have no gap between the supply of skills and demand that is to say, the required talents and innovations by the business community will be readily available in the economy in both quality and quantity. A fully equipped talent base, in turn, is also a net job creator through entrepreneurship since SMEs will be fully equipped hence their ability to maximise job creation and subsequently enhancing the overall Rwandan economic growth.

4.2 Current occupational categories requiring Skills and Their Specific Future Implication on the sector

According to RDB, (2021), the sector (tourism & hospitality) depends heavily on both skilled and unskilled labour depending on sub-sectors and employees are requested to possess a mix of technical and interpersonal skills thereof. These skills range from marketing (tours and travel for web & digital) and distribution, robust communication and interpersonal, sales and knowledge on historical and cultural tourism for the entire sector's value chain.

The Government of Rwanda has heavily invested in public and private education to provide professional training to students to prepare them for the labour market. Skills development is central to realising the economic and job growth potential of the Tourism sector. Driven by Government investments in education, the supply of skills by training institutions in the tourism sector, which includes MICE, has steadily grown with close to 22,000 students graduating in tourism related fields of study across public and private TVET and tertiary institutions in 2018

In addition, the required skills coupled with education/training qualifications in the sector should focus more on specific sound occupations that go beyond the usually found in the industry especially professionals at high positions like: Event Management and Operations. As by the findings from the skills assessment conducted on tourism and hospitality sector, below are the most current occupational categories demanding skills that have impact on the sector growth:

- Assistant Research Executive
- Assistant Event Executive/Assistant Project Executive
- Assistant Event Operations Executive
- Research Executive
- Event Executive/Project Executive
- Event Operations Executive
- Exhibition Producer/Conference Producer/Meeting Planner
- Event Manager/Project Manager
- Event Operations Manager
- Exhibition Director/Conference Director/Meeting Director

- Project Director

For the accommodation, food and beverage services subsector require the skills as indicated in the table 4 below;

Table 4: Skills required and Skills gaps (Accommodation, Food & beverage Services sub-sector)

| SKILL OCCUPATION LEVEL | SKILLS REQUIRED | SKILLS GAP |
|--|--|--|
| MANAGERIAL | | |
| Hotel Manager; Restaurant Managers; Events Manager; Food & Beverage Manager | <ul style="list-style-type: none"> • Management of hotel's brand • Developing marketing strategies • Management of marketing campaigns • Management of marketing communications • Supporting human resource, technology and/or finance operations | <ul style="list-style-type: none"> • Brand Guideline Development • Brand Portfolio Management • Budgeting • Content Writing and Editing • Data Mining and Modelling • Design Concepts Generation • Digital Marketing • E-Commerce Campaign Management • Infographics and Data Visualization • Market Research • Marketing Campaign Management • Marketing Communications Plan Development • Media Platforms Management • Media Strategy Development • Social Media Management • Stakeholder Management • Strategy Implementation • Technology Application • Technology Scanning • Tourism and Economic |

| SKILL | SKILLS REQUIRED | SKILLS GAP |
|--|---|--|
| | | <ul style="list-style-type: none"> • Development • Visual Collaterals Production • Website Performance Management |
| Event Management and Operations | Technical skills <ul style="list-style-type: none"> • Accident and Incident Response Management • Budgeting • Business Continuity Planning • Business Performance Management • Contract Development and Management • Corporate Governance • Crowd Control and Planning • Delegate and Participant Management • Employee and Labour Relations • Events Planning and Management • Learning and Development • Manpower Planning • Meetings, Incentives, Conferences and Exhibitions (MICE) Equipment Management and Venue Management | Soft skills <ul style="list-style-type: none"> • Business Negotiation • Communication • Decision Making • Developing People • Leadership • Problem Solving • Execute project plans • Drive projects' safety, security and health measures • Support human resource, technology and/or finance operations |
| Professionals | | |
| Housekeeping | <ul style="list-style-type: none"> • People management skills • Problem solving skills • Ability to groom staff • Knowledge of using housekeeping equipment, vacuum cleaning machines, laundry, etc. • Ability to interact with guests. | <ul style="list-style-type: none"> • Lack of communication skills to interact with clients • Inadequate mastery of housekeeping rules and Principles |
| Chef | <ul style="list-style-type: none"> • Menu planning and menu engineering Standardizing | <ul style="list-style-type: none"> • Inadequate awareness on latest cuisines |

| SKILL | SKILLS REQUIRED | SKILLS GAP |
|--|--|---|
| | dishes, recipes etc. – Yield management <ul style="list-style-type: none"> • Ensuring hygiene and cleanliness • Ability to prepare different kinds of cuisine • Awareness on food calorific values. • People management • Administrative skill Flair for creativity – Innovation in food preparation • Food presentation skill • Ability to plan menu • Knowledge on food costing • Quality control • Inventory management • Communication skills | <ul style="list-style-type: none"> • Inadequate people management skills • Inadequate knowledge of cost management • Inadequate management skills related menu planning, scheduling, etc. • Quality control • Inventory management |
| Technicians | | |
| <ul style="list-style-type: none"> • Cooks | <ul style="list-style-type: none"> • Knowledge of cuisines • Ability to prepare menu items Ensuring hygiene and cleanliness • Familiarity with all kitchen equipment Communication skills Time management | <ul style="list-style-type: none"> • Insufficient knowledge on cuisines • Time Management |
| <ul style="list-style-type: none"> • Waiters | <ul style="list-style-type: none"> • Ability to take orders and serve food in a professional and courteous manner Ensuring cleanliness • Maintain customer relationship | <ul style="list-style-type: none"> • Insufficient servicing skills Communicate • Inadequate skills in placed orders handling |

Source: Customized from primary data collection, 2020

There are areas in the sector that are probably not given consideration in Rwanda in terms of positions like the tourist attraction places for amusement and leisure and the required special skills include attraction **Management and Operations (Museum, Cultural Centres, Art and Galleries)**. The UNESCO Universal Declaration on Cultural Diversity (2001) recognizes cultural diversity as a common heritage of mankind' and considers its preservation as a concrete and ethical imperative, inseparable from respect for human dignity. The democratic Governance of cultural diversity should be adapted in many aspects, democratic citizenship and participation should be strengthened, intercultural skills should be taught and learned, spaces for inter-cultural

dialogue should be created, and intercultural dialogue should be taken to the international level. Intercultural dialogue cannot exist without the recognition of cultural diversity, while cultural diversity can exist without giving rise to inter-cultural dialogue.

Intercultural communication skills are another top required in the sector. The report on the role of public arts and cultural institutions in the promotion of cultural diversity and intercultural dialogue recognizes use and the definition on ‘intercultural competences’ as adopted in the 2008 Council conclusions on intercultural competences. It describes how the knowledge, skills and attitudes of particular relevance to intercultural competences are those relating to the following key competences: communication in foreign languages, social and civic competences, and cultural awareness and expression (ibid). Tour Operators in this subsector sometimes don’t have required specific information and skills to compete on international markets. This is sometimes due to limited industry knowledge and lack of exposure.

The eight museums in Rwanda are operated by staff who are able to provide information of what museums are all about but have not been trained to level of becoming professional historian who can be compared with others in similar occupation in the region and the world. **Employees in the Museum, Cultural Centres, Art and Galleries are not skilled in either tour operation nor in inter-cultural diversity management, communication, fluency in various languages, history, even in cultural and heritage and environment management.** These constitute the major skills gap in this subsector.

4.3 Current Skills Supply and Their Specific Future Economic Implication

Vision 2030 and EDPRS 1 and 2 made provisions for the development of human capital as a strong gear for economic growth and social progress. Vocational and technical training (TVET) institutions in the fields of technology, engineering and management and other areas were given a strong attention. This requires developing skills and attitudes targets reviewing and reforming national education curricula, establishing sector skills councils, strengthening TVET, internships, promoting adult literacy and short course basic skills training, a tripartite funding system for on-the-job training, and a youth entrepreneurship mentoring programme as its first priority. Education and training relevant to the labour market needs is key especially for Tourism and hospitality sector. Thus, tackling the challenges of unemployment and underemployment, especially skills availability, gaps and forecasting for the future needed workforce is eminent for better planning ahead.

While universities and colleges play a critical role in imparting technical skills, graduates also need skills in solution design, critical thinking and teamwork. Lack of such skills remain the gaps that is carried on to the workplaces.

The dynamic working environment in a start-up often calls for different soft skills than local university graduates can offer, such as creative skills and critical and independent thinking (UNCTAD, 2017a). Rwanda skills survey 2012 indicated that the existing tourism/hospitality courses offered by the training institutions in Rwanda were traditional and basic in hotel and hospitality areas

(targeting basic skills in cooking, general customer service, restaurant management, and basic hospitality skills). Therefore, critical courses that are needed for moving the sector to the next level and making it competitive in the region are lacking. These include the following courses at both certificate/diploma and degree levels, offered by University of Tourism Technology and Business studies (UTB), Mount Kenya university, and Akilah.

- Tourism Product Development and Management
- Destination Management
- Tourism business development & management specialist
- Tourism Marketing
- Tourism & Hospitality Entrepreneurship
- Tourism Resort Operations
- Management of Game parks and Historical sites
- Wildlife management; Wildlife Health & Management
- Events Organization and Management
- Cultural tourism Specialists
- Eco Tourism specialists
- Tourism historians and archaeologists
- National Arts & Music
- Front Office Management and Operations
- Event management specialists
- Hotel Engineers
- Interior Design and Décor

4.3 Anticipated Demand and Skills Gaps by 2030

There are some major gaps in the sector that require skilling, in competences and human resources. The gaps are indication of potential employment opportunities. Some potential reasons for these skill providers who are yet to reach the level of satisfying the market demand in terms of professionals, and technicians can deliver the service at competitive level and travellers' expectations. Below are areas in which skills gaps are prevalent and correspondent occupation that are required to fill those gaps.

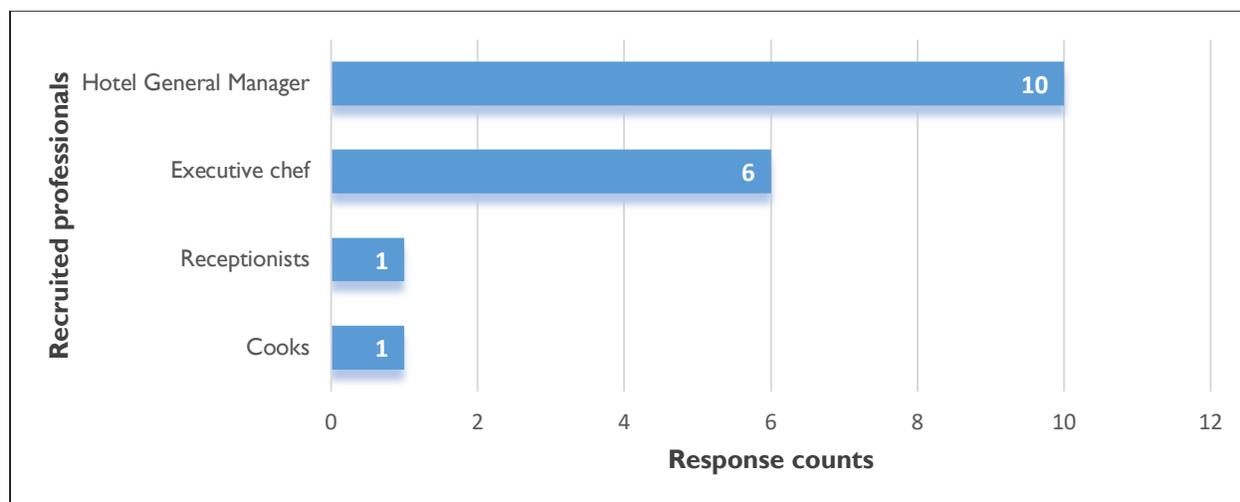
For accommodation Food and beverage Services sub-sector there is **Business Development, Sales, Sponsorships and Marketing**. Rwanda skills survey 2012 indicated that by then, the training institutions offered very limited and general courses on tourism sector, which are mostly theoretical. Today, practical training is still minimal and limited to the institution's capacity and internship provider's environment which sometimes places limits on internees. Furthermore, skills required at managerial levels is still also high despite its limited supply from the Rwandan institutions which poses the need to recruit from the region and sometimes at international level.

Below is the list of occupations required in Accommodation Food & beverage Services sub-sector (Managerial level):

- Assistant Marketing Executive
- Assistant Sponsorship Executive
- Marketing Executive
- Sponsorship Executive
- Marketing Manager
- Sponsorship Manager
- Business Development Manager
- Sales Manager
- Marketing Director
- Sponsorship Director
- Business Development Director
- Sales Director

From skills assessment conducted in the tourism & hospitality sector, most of respondent outlined some key positions predominantly occupied by outsourced professionals from the region. As it is indicated in the **Figure below**, hotel managers come on first row in foreigner recruitment followed by chief executives which indicates the skills gaps in such positions.

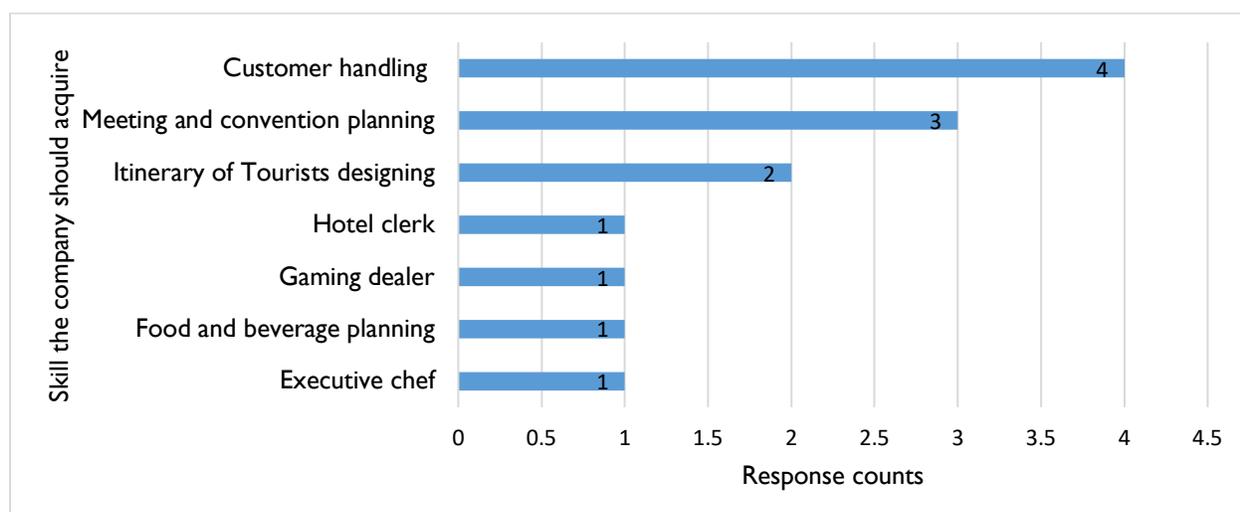
Figure 2: Key positions outsourced from the region



Source: Customized from primary data collection, 2020

In addition, given that many tasks and activities in the sector are changing in line with technological, economic and social change, with new and hybrid occupations, majority of respondents pointed out that customer handling skills is the highest in skills shortage in all subsectors, followed by meeting and convention planning, and itinerary of tourists designing (**See figure 4**).

Figure 3: Skills shortage in Tourism & Hospitality sector



Source: Customized from primary data collection, 2020

Furthermore, for the skills gaps in Hotel and Accommodation Sub Sector, especially the restaurant subsector majority of employers differ in the type of all workforce and the common available skills are for waiters, cooks, chefs, bartenders, kitchen helpers. For the gaps see table 6.

Table 5: Skills Gaps in Hotel and Accommodation Sub Sector

| Occupational gaps | Skills required | Skills Gaps |
|--|---|--|
| <ul style="list-style-type: none"> • Restaurant manager/supervisor • Chefs • Head Cooks • Cooks • Food and Beverage • Management/Specialists • Pastry and bakery activities specialists • Translators, interpreters and other linguists • Advertising and marketing professionals • Public relations professionals / Customer Handlers/Customer service professionals • Hotel receptionists • Waiters • Bartenders • Cleaning and housekeeping | <ul style="list-style-type: none"> • Cook Confectioner Wine cellar and stock officer • Concierge Clerk officer • Cooking skills and attention to detail. • The ability to manage a budget and keep accurate records | <ul style="list-style-type: none"> • Bar or restaurant management Maitre Second Maitre mastering • Main chef, Second chef mastering • Booking management • Cooking expertise in different types of cuisines • Organization and communication skills |

Source: Customized from primary data collection, 2020

4.4. Skills gaps in the Use of ICT in Tourism and Hospitality sector

Regarding the skills gap in ICT -all subsectors (for both Tour& Travel and hotels), the skills assessment in sector revealed that very minimal ICT technologies are used thus, Professionals and technicians of high acumen are in a major range of gaps and they are listed below:

- Wi-Fi infrastructure overhauls
- Digital conference facilities
- Mobile communication and automation
- NFC technology
- Smart room keys
- Robots and infrared sensors
- Entertainment on tap
- Cloud services
- Integrated, seamless experiences
- Mobile Technology
- Augmented Reality
- Internet of Things (IoT)
- Virtual Assistants
- Blockchain
- 5G

Basing on observation from the skills assessment in tourisms & Hospitality sector, it is noticeable that across all subsectors, digital skills is prevalent in gaps, followed by data collection and market research, as pointed out by respondents. For the sector to be competitive, it will be imperative that all above listed technologies are applied in every day work and must be taken as a major skill required and gaps that need to be bridged in a shorter term (**See figure 4**).

Figure 4: Skills gaps across all Tourism & Hospitality subsector



Source: Customized from primary data collection, 2020

4.4 Main barriers to the closing skills gap

By far the most common reason employers in the accommodation, food and tourism activities sector given by respondents for not providing training are: **limited training funds, frequent mobility of Labor force, and fear of staff poaching across the sector.** these prevalent cause of barriers to trainings (see figure 5).

Figure 5: Barriers to training/skills development



Source: Customized from primary data collection, 2020

CHAPTER FIVE: SECTOR SKILLS RESPONSE TO ADDRESS THE IDENTIFIED SKILLS GAP

5.1 Introduction

The global context of growth in travellers directly benefits the hotel industry's revenue. Consumer spending on accommodation services is forecast to increase from \$5.6 trillion in 2018 to \$7 trillion in 2025 – an increase of over 25% ^[4]

Looking at Rwanda's revised national employment policy, the working age population by levels of education shows that 49.7% has not attended or finished primary school, 29.6 % has finished primary school, 8% has finished low secondary education, 8% has finished secondary education and 4% has finished university studies. This is a clear indication that a big number of Rwandans have no formal qualifications yet the government aspires to transformation the country from a predominantly agrarian-based, low-income economy to an industrial upper middle-income nation by 2035.

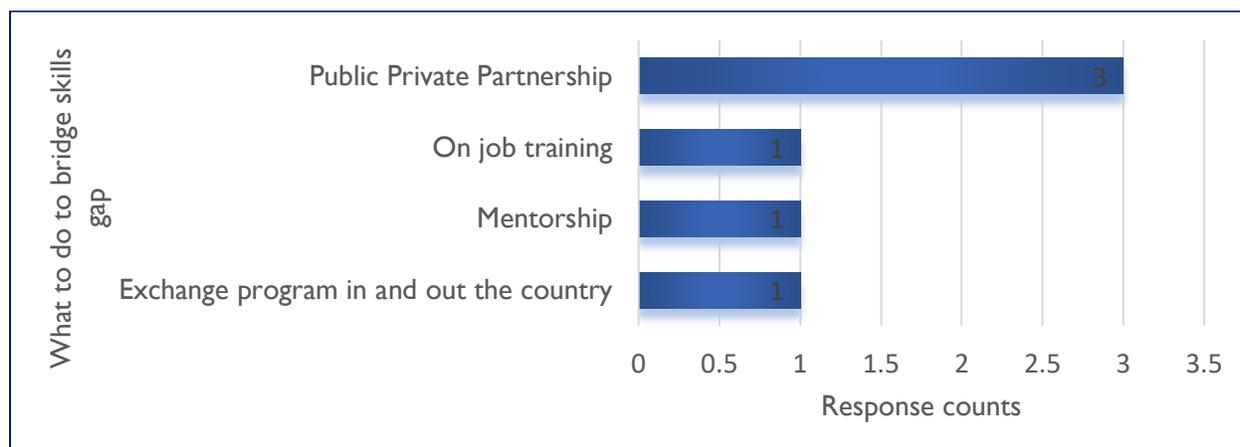
The role of skills and skills development through training in the contemporary economy is a matter of considerable academic and political debate. Public policy in many countries focuses on the development, through training, of what are seen as a high skills employment and business environment (Brown et al, 2001). At the same time, most developed or high skills economies also depend to a significant extent on an alternative economy based on what are loosely and pejoratively described as 'low skills' jobs. Little critical analysis has been undertaken with respect to what such descriptors actually mean. This means skills debate in hospitality in four key theme areas: the nature of work and skills in hospitality; de-skilling within the hospitality workplace; the technical/generic skills debate within hospitality; skills and the education/training process in hospitality.

5.2 Ways to Bridge the Skills Gap in Tourism and Hospitality sector

In line with gaps identified, respondents presented some of the ways to bridge those gaps. In the figure 3 highlights the ways proposed by respondents to bridge the identified gaps. Also, tour guides are also important in tour and travel operations. Guide needs skills to make trips enjoyable and educative that is important in communicating in different languages. Tour Guides needs skill in Helping to Save time by providing the necessary information to guests, playing the role of intermediary between guests and hotel management.

⁴ <https://ecommons.cornell.edu/>

Figure 6: Ways to bridge identified skills gaps



Source: Customized from primary data collection, 2020

5.4 Lesson to learn from Tourism and Hospitality Sector in the region and beyond.

If tourism and hospitality sector in Rwanda were to emulate the other advanced countries' system of skills development in the sector, the chamber and its members as well as PSF help the tourism and hospitality schools and other tertiary institutions to assess the learners on a more frequent basis, and could also become partners in financing the education of learners together with industry.

South Africa

The apprentices are taught that accuracy is more important than speed and they are given time to grasp difficult skills in spaced learning which is in a sequence of skill development. Students learn and develop their skills best by actual hands-on experiences and do very well when they see progress being made. These principles can be duplicated by tourism and hospitality sector in Rwanda.

Germany

The key to success in Germany is the total commitment of 'employers' to training and their willingness to pay for training. Many hotel groups will even train a greater number of learners than they actually need for their own operations. They pay their learners a higher salary than one would expect and readily form partnerships with tertiary institutions that are able to provide them with the necessary human material. The trade unions of the hospitality industry are also very involved in facilitating the effective experiential encounter of learners. They convene meetings between the relevant stakeholders and make certain that learners are not exploited or abused by the businesses that are employing them. (OECD iLibrary)

Kenya

Kenya sees Job performance as the behaviour of employees directly involved in producing goods or service activities that provide indirect support to the organization's core technical processes. Job performance is crucial when employees use their specific skills and knowledge to support their core technical processes.

Kenya Tourism and hospitality sector emphasises following skills:

- Management/leadership skills;
- Organizational skills;
- Customer service; communication in foreign language skills;
- Interpersonal skills;
- Cross-cultural skills;
- Business and communication skills;
- Technological skills in the department.

How did Destination Kenya promote?

- Global Online consumer campaigns on Google;
- Online Travel agencies such as Travel Zoo;
- Aljazeera and CNN Online;
- Continuous Digital consumer advertising campaigns on Expedia and Tripadvisor and on social media and Google search;
- Joint marketing campaigns with travel trade associations such as APTA, SATOA, ATTA, in key markets;
- Travel trade roadshows in the UK, India, USA and China markets showcasing experiences and services by the private sector players.

Singapore

Singapore develops The Skills Framework (SFw) initiative developed for the Singapore workforce to promote skills mastery and lifelong learning, and takes reference from the Industry Manpower Plans (IMPs) where available.

Jointly developed by Singapore (SSG), Workforce Singapore (WSG), and the Singapore Tourism Board (STB), together with industry associations, training providers, organisations and unions, the Skills Framework for Tourism provides useful information on:

- Sector information;
- Career pathways;
- Occupations and job roles;
- Existing and emerging skills; and

- Training programmes for skills upgrading and mastery. For:

Individuals who wish to join or progress within the Tourism sector, to assess their career interest, identify relevant training programmes to upgrade their skills and prepare for the desired job roles.

Employers will be able to recognise these skills and invest in training their employees for career development and skills upgrading.

Training can gain insights on sector trends, existing and emerging skills that are in demand, and design programmes to address the industry needs accordingly.

CHAPTER SIX: CONCLUSION AND RECOMMENDATIONS

6.1 Conclusion

Tourism and hospitality sector is growing dynamically, yet there is an untapped potential for growth and development. These areas require professional skill to drive each of them to the point of attainment of domestic market and attract and compete internationally. Apart from cultural tourism, which is mostly taking place in visit-and-see forms, there is the potential to further develop engage-and-experience type of touristic products: agritourism, ecotourism, local newly invented wine and gastronomy tourism, adventure tourism. Development of MICE tourism is yet another profitable sector. With an increasing global trend of responsible tourism, travellers are more concerned about the local communities they visit. Tourists become more conscious about the society and the environment when travelling. One way for tourism and hospitality sector businesses to become distinctive is through specific certifications which goes with each subsector, information, Standards are benchmarks against which occupations (or a set of skills) and the proficiency of people in those occupations are assessed.

6.2 Recommendations

| No | Recommendation | Responsible for implementation | Timeframe |
|----|---|--------------------------------|---------------------|
| 1 | The required skills coupled with education/training qualifications in the sector should more focus on specific sound occupations that go beyond the usually found in the tourism sector | RDB, MINICOM, MINEDUC | Short and long term |
| 2 | Exchange program in and out of the country, on job training, mentorships, are very crucial for exposure, and learning from expert and professionals who have been in the field enough and acquired skills at high levels. This should be guided by skills gaps and require across all tourism subsectors. | RDB, MINICOM, MINEDUC | Short and long term |
| 3 | Mobilise all tourism and hospitality sector members and stakeholder as well | RDB, MINICOM, MINEDUC | Short and long term |

| No | Recommendation | Responsible for implementation | Timeframe |
|----|---|--------------------------------|---------------------|
| | as partners to collaborate with institutions that provide skills in curriculum development that is market-let learning oriented | | |
| 4 | Materialise on best practices from more advanced countries in tourism and hospitality sector | RDB, MINICOM, MINEDUC | Short and long term |

Note: PSF will spearhead implementation of these recommendations by coordinating all stakeholders relevant looking at their roles.

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ANNEXES

Establishment contacted and Key informant

| Name of company/School | Position |
|-------------------------------------|----------------------------|
| Kigali Serena | Managing Director (or CEO) |
| Marriot Kigali Hotel | Managing Director (or CEO) |
| Radisson Blue | Managing Director (or CEO) |
| One and Only Nyungwe | Managing Director (or CEO) |
| Hotel des Mille Colline Hotel | Managing Director (or CEO) |
| Sabyinyo Sylverback Lodge | Managing Director (or CEO) |
| Golden Tulip Bugesera | Managing Director (or CEO) |
| Five-to Five Hotel | Managing Director (or CEO) |
| Heaven Restaurant & Boutique Hotel | Managing Director (or CEO) |
| Yambi Guest House | Managing Director (or CEO) |
| Cozy Safari | Managing Director (or CEO) |
| Nobleza hotel | Managing Director (or CEO) |
| Kigali Castle Bed & breakfast | Managing Director (or CEO) |
| OlympiHotel | Managing Director (or CEO) |
| The Next | Managing Director (or CEO) |
| Lebanon Hotel | Managing Director (or CEO) |
| Pepon Living Spaces | Managing Director (or CEO) |
| Mythos Boutique Hotel | Managing Director (or CEO) |
| Dove Hotel Kigali | Managing Director (or CEO) |
| Wild Tour Rwanda | Managing Director (or CEO) |
| Hermos life Tours and Travel Rwanda | Managing Director (or CEO) |
| Explore Rwanda | Managing Director (or CEO) |
| Primate Safari | Managing Director (or CEO) |
| Jombo Travel & Tour Agency | Managing Director (or CEO) |
| Volcano Safari | Managing Director (or CEO) |
| Eco Tour Rwanda | Managing Director (or CEO) |
| Rwanda Gorilla Travel | Managing Director (or CEO) |
| Gorilla Adventure Tours | Managing Director (or CEO) |

