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D2.2 Report on Social and Environmental Sustainability in the Work Environment in Tourism

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Exploratory Study: Scope and Limitations

This report is an exploratory study. It does not pursue statistical representativeness and does not claim generalisability beyond the participating enterprises. The sample of 170 SMEs across six countries was assembled through partner networks and reflects the contexts and sub-sectors of the RESKILL consortium. Findings are intended to inform policy discussion, training design, and future research within the project. Quantitative data is used descriptively and comparatively; the primary value lies in the triangulation of survey evidence, PESTEL analyses, focus groups, in-depth interviews, and foresight workshops across six national contexts.

Foreword

This report is the main deliverable of Work Package 2, Task T2.5 of the RESKILL Revolution project (Erasmus+ KA220-HED, 2025-2028), coordinated by LCU (Italy) with contributions from partner institutions in Finland, Germany, Lithuania, Spain, and Poland. It presents a state-of-the-art analysis of the social and environmental sustainability of tourism workplaces across the six partner countries, based on a cross-national survey of 170 SMEs, PESTEL analyses, focus groups, expert interviews, and scenario-based workshops conducted between June 2025 and February 2026. All findings are presented in the exploratory spirit stated above and are intended to inform the design of the RESKILL micro-training platform and subsequent project phases.

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1. Introduction

1.1 Policy context

European tourism contributes approximately 10% of EU GDP and supports more than 27 million jobs (OECD, 2024). Yet the sector has long been characterised by precarious employment, high seasonality, low wages relative to other service sectors, and persistent workforce shortages that predated the pandemic and have intensified since. The COVID-19 crisis removed an estimated 62 million jobs from the global tourism workforce (UNWTO, 2021); recovery in visitor numbers has not been matched by recovery in workforce stability across any of the six partner countries covered in this study.

This situation unfolds against two overlapping European policy imperatives. The first is the twin transition: the simultaneous pursuit of environmental sustainability and digital transformation, enshrined in the European Green Deal, the European Digital Strategy, and the New Skills Agenda. These frameworks place demands on employers and workers to develop competencies that most tourism SMEs currently lack in sufficient depth, and create a regulatory and reputational environment in which enterprises that fail to develop sustainability and digital capabilities will face growing competitive and compliance pressure. The second is the EU Labour Shortages Action Plan (2023), which identifies tourism and hospitality as one of the sectors most affected by structural skill mismatches and calls for targeted intervention through vocational education, adult learning, and sectoral training frameworks adapted to SME conditions. The European Pillar of Social Rights provides the normative architecture, establishing access to quality employment, fair working conditions, and lifelong learning as rights to be upheld across all member states.

It is in this policy environment that the RESKILL Revolution project was designed. The project brings together six partner institutions from Finland, Germany, Italy, Lithuania, Poland, and Spain with the aim of developing innovative adult education tools and platforms that respond specifically to the needs of the tourism workforce, enabling SMEs to invest in upskilling and reskilling in ways that are proportionate to their size, operationally compatible with the demands of service delivery, and aligned with the sustainability and digitalisation agendas of European policy. The project methodology centres on participatory research conducted directly with tourism enterprises and their workers, ensuring that the tools and frameworks developed are grounded in the realities of the sector rather than in abstract policy requirements.

1.2 Research objectives and scope

Task T2.5 was designed to address three core questions. First: what are the current conditions of employment and workplace sustainability across tourism SMEs in the six partner countries, and how do they compare across national and institutional contexts? Second: what are the main structural challenges facing employers and workers, and how do they vary across the Nordic-Continental, Southern European, and Central-Eastern European institutional settings? Third: what do these conditions and challenges imply for training tools, recognition frameworks, and policy instruments?

The study adopts a back-casting approach: starting from a desired future state (a socially and environmentally sustainable European tourism sector in 2030) and working backwards to identify what changes in current conditions, employer practices, policy frameworks, and adult

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education infrastructure are required. The geographical scope covers Finland and Germany (Nordic-Continental cluster), Italy and Spain (Southern European cluster), and Lithuania and Poland (Central-Eastern European cluster). This diversity is both a practical constraint (reflecting which partner institutions were available) and an analytical asset, enabling the identification of patterns that hold across very different national settings as well as differences that reveal the institutional determinants of workplace sustainability practices.

The back-casting approach was chosen deliberately over conventional forward-looking forecasting methods because it maintains the normative orientation necessary for policy-relevant research while remaining analytically disciplined. Rather than asking what the tourism sector will look like in 2030 based on current trends (which would largely confirm and extrapolate the problems documented in this report), it asks what the sector needs to look like in order to be socially and environmentally sustainable, and what conditions, investments, and structural changes are necessary to reach that state. This reframing from forecast to design is consistent with the action-oriented mandate of the RESKILL project and produces findings that are directly actionable rather than descriptive.

1.3 Structure of the report

The report moves progressively from context to analysis to implications. Section 2 describes research design and methods. Section 3 presents national profiles for each of the six partner countries. Section 4 provides cross-country comparative analysis organised around three institutional clusters. Section 5 examines six thematic areas of social and environmental sustainability in depth. Section 6 synthesises the evidence through six integrated findings and draws out implications for the RESKILL platform. Section 7 sets out conclusions and recommendations for policy, training, and future research.

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2. Research Design and Methods

2.1 Quantitative survey

A standardised online survey was administered to tourism SMEs in all six partner countries between June and October 2025. Drawing on the ESCO classification system and the Next Tourism Generation Alliance competency frameworks, the instrument covered five thematic areas: employment structure and workforce trends since 2019; skills needs across green, digital, and soft competency domains (35 items rated on a 5-point importance scale); training provision and barriers; environmental sustainability practices; and post-pandemic recovery status and five-year outlook. Respondents were tourism SME managers and HR professionals, reached through partner institution networks, industry associations, and direct outreach.

The final sample comprised 170 valid responses: Lithuania 51, Germany 40, Spain 34, Italy 23, Poland 12, Finland 10. Enterprise size distribution: micro enterprises (1-9 employees) 43%, small (10-49) 31%, medium (50-249) 26%. Sub-sector coverage included accommodation, food and beverage, tour operators and travel agencies, attractions and entertainment, tourist guiding, and transport-related services. Lithuania accounts for 30% of the total sample, so aggregate statistics are influenced disproportionately by Lithuanian respondents; the cluster-level analysis, which pools samples within institutional groups, reduces this effect for comparative purposes.

Survey data were collected using a five-point Likert scale for all skills importance items (1 = not at all important; 5 = extremely important), and binary or multiple-choice formats for employment structure, strategy adoption, challenge identification, and sustainability practices questions. The questionnaire was administered in the partner language of each country, with translations managed by partner institutions and reviewed for terminological consistency. Response rates varied across countries, and the sampling approach through partner networks introduces a selection bias towards enterprises that are already engaged with higher education institutions and innovation processes; this is acknowledged as a limitation of the exploratory design and is addressed in the scope and limitations statement above.

2.2 Qualitative methods

The quantitative survey was complemented by a structured programme of qualitative research consistent in format across partner countries. Each partner institution conducted: a PESTEL analysis of the national and regional tourism labour market; a focus group with tourism professionals and stakeholders (6-8 participants, 60-85 minutes, audio-recorded with GDPR-compliant consent); in-depth semi-structured interviews with policy-oriented experts (2-3 interviews, 55-75 minutes); and a scenario-based foresight workshop engaging industry and education representatives. Focus groups and interviews were conducted between November and December 2025.

Focus groups used a standardised semi-structured agenda covering current employment challenges, skills needs, training provision and barriers, workplace attractiveness and retention strategies, and recovery trajectory. In-depth interviews followed a common guide across seven thematic areas: context and positioning, employment situation, skills needs, training and professional development, workplace sustainability and attractiveness, recovery and strategic outlook, and final reflections. Foresight workshops used the PESTEL tool for current context analysis, followed by scenario identification and future worker skills profiling,

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consistent with the back-casting methodology. All qualitative data were collected with informed consent in compliance with GDPR requirements.

The qualitative research programme produced the following materials per country: PESTEL analysis reports documenting the macro-structural forces shaping each national tourism labour market; focus group reports summarising the main themes and illustrative quotations from each session; interview reports distilling the key perspectives of each expert respondent; and workshop reports presenting the scenarios and skills profiles developed. These materials are preserved in the project knowledge base and are available to consortium partners for further analysis and reporting. The present report draws selectively on all these materials, citing them by type and country where relevant, and triangulating insights across sources to reach the integrated findings presented in Section 6.

2.3 Institutional cluster framework

Six partner countries are grouped into three institutional clusters following comparative capitalisms literature (Hall and Soskice, 2001; Esping-Andersen, 1990). The Nordic-Continental cluster (Finland and Germany, n=50) is characterised by relatively high collective bargaining coverage, strong VET traditions, and regulated employment standards. The Southern European cluster (Italy and Spain, n=57) is characterised by Mediterranean employment patterns: high seasonality, geographic concentration of tourism activity, and employment structures shaped by intense international demand. The Central-Eastern European cluster (Lithuania and Poland, n=63) is characterised by rapid economic convergence with Western European income levels and lower collective bargaining coverage. The cluster framework is used as the primary analytical unit for cross-country comparisons in Section 4; national variation within clusters is acknowledged throughout.

The cluster framework is not intended as a rigid typology but as an analytical heuristic. Membership in a cluster reflects a set of shared institutional features that shape the range of available policy instruments and employer strategies, not a deterministic prediction of outcomes. Within each cluster, national variation is real and analytically significant, as documented in Section 4. The value of the framework lies in its capacity to reveal cross-national patterns that would be invisible if countries were compared only individually, and to identify structural features of labour market governance that shape employer behaviour in ways that survey data alone cannot capture.

2.4 Sample overview

Table 1. Survey sample by country, enterprise size, and institutional cluster.

Country	n	Micro	Small	Medium	Main sub-sectors	Cluster
Finland	10	60%	20%	20%	Accommodation, F&B	Nordic-Cont.
Germany	40	30%	48%	22%	F&B, Accommodation	Nordic-Cont.
Italy	23	70%	13%	17%	Accommodation, Agencies	Southern EU

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Spain	34	32%	38%	30%	Accommodation, F&B	Southern EU
Lithuania	51	43%	22%	35%	Accommodation, Tour ops	Central-East.
Poland	12	50%	33%	17%	Accommodation, F&B	Central-East.
Total	**170**	43%	31%	26%		

Source: RESKILL Project survey data (2025).

The dominance of micro enterprises (43%) is consistent with European tourism sector structure, where most enterprises employ fewer than ten persons and operate with very limited administrative capacity. The Central-Eastern European cluster (n=63) is the largest of the three, followed by the Southern European (n=57) and the Nordic-Continental (n=50). Finland (n=10) and Poland (n=12) are treated as indicative and interpreted primarily within their respective clusters.

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3. The Tourism Labour Market in Six European Countries: National Profiles

Each profile draws primarily on official national statistics and integrates WP2 survey findings as an indicative snapshot. Qualitative insights from PESTEL analyses, focus groups, and interviews are used to characterise structural challenges and to identify the mechanisms behind statistical patterns. Profiles should be read as contextual anchors for the cluster analysis in Section 4, not as comprehensive national labour market studies; their depth is necessarily constrained by the space available and by the exploratory character of the overall study.

A note on generalisation: the PESTEL analyses for Germany and Italy were conducted in specific regional contexts (Schleswig-Holstein and Lazio respectively), and the workshops in Italy and Spain had specific local settings (Lazio region and Barcelona). Throughout this report, findings from these regional studies are presented at the national level, with the understanding that they provide plausible and evidence-grounded national insights rather than strictly representative data. Where regional specificity is particularly significant for interpretation, it is noted.

3.1 Finland

Tourism accounts for 5.3% of total employment in Finland and contributes 2.4% of GDP; total tourism demand reached 16.6 billion euros in 2024, up from 16.3 billion euros in 2019 (MEAE, 2024; MARA, 2024). Employment is geographically concentrated: Uusimaa accounts for 37% of tourism jobs, while Lapland records the highest regional GDP share at 8.4%. Foreign visitor demand remained approximately 16% below the 2019 peak in 2024, largely due to the near-total collapse of Russian tourist flows following the war in Ukraine; domestic tourism has partially compensated but cannot fully offset this structural loss.

The sector presents a structural mismatch: more than 7,000 open vacancies per month in accommodation, food and tourism services coexist with approximately 15,000 unemployed tourism workers actively seeking work (MEAE, 2024). Almost all open positions are remunerated below the national median wage (MEAE, 2024; MARA, 2024). These conditions deter re-entry by former workers and make sustained workforce planning difficult for individual enterprises. Foreign workers account for 23% of employed persons in accommodation and food services, a share that has grown steadily since 2022 and is expected to continue growing as Finnish demographics tighten the domestic labour supply.

The RESKILL survey (n=10) reflects national conditions. Language skill deficiencies (40%) and lack of qualified candidates (30%) lead the recruitment challenges, consistent with Finland's specific geographic and linguistic barriers. Flexible working conditions (60%) dominate staffing strategy; wage competition is low (18%), reflecting collective bargaining constraints. Training investment is very limited (18%), driven by operational time constraints. Post-pandemic recovery is the lowest in the sample: 30% report full recovery or growth.

The foresight workshop at Laurea University of Applied Sciences produced four employment scenario profiles for Finnish tourism in 2030, structured around axes of technology adoption and sustainability commitment. Across all scenarios, the workshop identified a shared "no-regrets capability stack": adaptability and service design embedded in every role; a digital

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customer toolkit covering e-commerce, CRM, data literacy, and cybersecurity; green essentials including environmental awareness, resource efficiency, and circular practices; an inclusive talent model featuring fast recognition of prior learning and Finnish-at-work language support; and modular micro-credentials that can be accumulated over time without requiring extended periods away from work.

From a policy perspective, the Finnish case illustrates a broader European challenge: high institutional quality (strong collective bargaining, good VET infrastructure, developed sustainability culture) does not automatically translate into workforce stability when the underlying demand environment is disrupted and when the structural conditions of service employment (below-median wages, temporary agency work, geographic mismatch) remain unaddressed. The Finnish evidence suggests that solving the labour shortage requires not only institutional continuity but targeted interventions on wage levels, geographic accessibility, and the recognition of atypical employment relationships within the social protection system.

3.2 Germany

Germany's tourism sector employs approximately 2.7 million workers (6.0% of total employment) and contributes 144 billion euros directly to gross value added (3.7% of GDP), with a total economic contribution of 484 billion euros when indirect and induced effects are included (DIHK/BTW/DTV, Wirtschaftsfaktor Tourismus 2024, December 2025). Real tourist consumption in 2024 stood at 319 billion euros, still 15 billion euros below 2019. The pandemic temporarily eliminated approximately 800,000 positions; recovery has been steady but uneven: Germany recorded nearly 40 million international arrivals in 2024, while real tourist consumption remained 15 billion euros below 2019 (DIHK/BTW/DTV, 2025).

Collective bargaining covers approximately 54% of tourism workers, above Southern and Central-Eastern European levels but below other German service sectors. The PESTEL analysis (Schleswig-Holstein) identifies demographic ageing, automation pressure, labour cost dynamics, and digital transformation as the primary macro-structural forces shaping the sector. The focus group (Kiel, November 2025) and in-depth interviews (Britta Thege, February 2026) converge on a structural image problem: the sector is perceived as offering insufficient career prospects to attract well-qualified young people, and turnover rates are rising particularly in food and beverage. Both interviewees also identify the vocational education and training system as an underused resource, arguing for stronger industry-education cooperation in curriculum design, apprenticeship pathways, and the co-development of micro-credentials stackable within the German qualification framework.

The survey (n=40) shows the highest rate of lack of qualified candidates as a recruitment challenge (70%). Environmental sustainability practices are the most developed in the sample: 75% report waste reduction, 62.5% energy efficiency, 72.5% reduction of single-use plastics, and 22.5% hold green certification, markedly higher than all other partner countries. Training investment remains low (13%), blocked by operational time pressure (62.5%). Recovery is modest: 38% report full recovery. The Kiel workshop produced three future worker profiles (Digital Service Specialist, Sustainable Experience Curator, Multicultural Team Leader), each with soft skills as the common foundation across all profiles and scenarios.

The German evidence illustrates a sector structurally more advanced in sustainability investment than its European partners, but one that faces persistent challenges around image,

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turnover, and the alignment between VET system outputs and enterprise needs. The institutional conditions for higher-quality tourism employment exist in Germany, but their translation into actual practice requires sustained employer effort, industry-education partnership, and policy support that goes beyond what most individual enterprises can generate unilaterally.

3.3 Italy

Italy's tourism sector employs approximately 385,000 persons in directly tourism-linked activities (ISTAT, November 2024), up 8.7% on 2022 and 1.2% above 2019 levels. The extended sector reaches approximately 2 million direct and indirect workers in 2024 (13% of total national employment; WTTC, 2024). Italy received 57.73 million international tourists in 2024, generating revenues of 58.81 billion US dollars, 18.8% above 2019. Despite strong demand recovery, approximately 260,000 positions remained unfilled in 2024 (down from 350,000 in 2022). The labour force is predominantly young (58.7% under 40) and predominantly female, with high rates of fixed-term and seasonal contracts.

The PESTEL analysis (Lazio region) identifies fragmented labour regulations, complex permitting processes, inadequate public transport for worker mobility, limited inter-municipal coordination, and the absence of sector-specific fiscal incentives as structural constraints. The focus group highlights a central tension: commercial recovery has not been matched by improvement in working conditions. Younger workers are deterred by irregular hours and perceived low returns. In-depth interviews with Italian governance and policy experts describe a widespread pattern of implicit on-the-job training: the most effective skills transfer is embedded in the workplace and contextual, rather than delivered through formal multi-day courses. Both interviewees also identify an emerging requirement for metacognitive capacity in the Italian market, particularly in experiential tourism: the ability to continuously learn, adapt, and anticipate change in dynamic service environments.

Survey data (n=23) show the highest seasonality-related recruitment challenge (48%). Green skills are rated lowest of any national group (mean 3.24/5); green certification is reported by only 4% of respondents. The foresight workshop produced scenario-based profiles of future Italian tourism employment structured around PESTEL dimensions, with recommendations focused on embedded micro-training formats and public-private skills development partnerships. Recovery is strong: 65% report full recovery or growth.

The Italian case raises an important general principle for the project: high demand recovery does not resolve workforce sustainability challenges and can in some respects worsen them by increasing workload intensity without commensurate improvements in staffing levels or conditions. The Italian evidence suggests that demand-side success must be accompanied by supply-side policy investment if tourism is to avoid a situation where commercial growth accelerates workforce exit rather than attracting new entrants.

3.4 Lithuania

Lithuania's tourism sector recorded total value added of 1.7 billion euros in 2023, up 28% year-on-year and 31.3% above pre-pandemic levels (International Trade Portal, 2024).

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International tourism revenues reached 1.92 billion US dollars in 2024, 28.4% above 2019; international arrivals grew a further 21% in Q1 2025 compared to Q1 2024 (Statistics Lithuania, 2025). The most recent employment estimate places approximately 47,063 persons directly employed in tourism (2022, UNWTO). Collective bargaining coverage stands at 26.6%, the lowest among the six partner countries (EURES, 2024). The minimum wage was 924 euros per month in January 2024, rising to 1,038 euros in January 2025; average gross earnings stood at approximately 2,196 euros in Q2 2024, compared to an EU27 average of 3,417 euros (Eurostat). This wage gap creates intense inter-sectoral competition for labour that tourism, as a service sector with limited automation potential in direct customer-facing roles, finds particularly difficult to address.

Vilnius accounts for approximately two-thirds of Lithuania's tourism activity. The focus group identifies wage competition from manufacturing, logistics, and technology sectors as the primary structural challenge. One participant noted that Vilnius and other regions are like two separate planets in terms of labour market conditions. Work-life balance is an increasingly non-negotiable expectation among younger workers. A distinctive finding is the widespread practice of implicit on-the-job training: in micro-enterprises where formal training is impossible, supervisors and experienced colleagues transmit practical knowledge through daily supervision, peer observation, and informal mentoring. This mode of learning is largely unrecognised and undocumented but is described as the primary vehicle for skills development in the sector.

Survey data (n=51) show the highest salary mismatch challenge (47%) and notable geographic location difficulties (21.6%). Flexible working (53%) and wage increases (49%) are both widely adopted, reflecting competitive pressure to attract and retain workers. Soft skills are rated highest in the sample (mean 4.40/5); green skills show an operational orientation, with resource efficiency (4.22/5) and sustainable event management (4.18/5) at the top. Recovery: 51% report full recovery.

The Lithuanian context offers one of the clearest illustrations of the wider Central-Eastern European challenge: economic growth that benefits the overall population and drives up living standards can simultaneously make it harder for labour-intensive service sectors to maintain competitive wage levels. How tourism can remain an attractive employment option in rapidly converging economies is a question that policy, employers, and education institutions will need to address urgently over the next decade.

3.5 Poland

Poland's tourism sector supports approximately 964,271 direct workers (2023, UNWTO); WTTC estimates 884,400 jobs attributable to travel and tourism in 2024, contributing PLN 144.5 billion to GDP (4.0% of the economy; WTTC, 2025). International arrivals reached 19.72 million in 2024 (revenues 14.27 billion US dollars, up 1.9% on 2019). Domestic visitor spending was PLN 42.8 billion (up 5.6% on 2019), while international spending remained 20.1% below pre-pandemic levels. Overnight stays in tourist accommodation reached 38.8 million in 2024, with a further 7.2% increase recorded in Q1 2025 (GUS, 2025).

Two in-depth interviews with Polish tourism experts (December 2025) identify soft skills as the primary human capital gap, particularly communication, teamwork, and customer interaction competencies among younger workers. High turnover is a defining feature:

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workers leaving positions after days or weeks prevents employers from investing in training, creating the cycle in which lack of investment further reduces the sector's attractiveness. Sustainability is widely discussed but treated more as a communication tool than a substantive operational commitment. Approximately 26% of Polish tourism enterprises now employ workers from Ukraine (Micek et al., 2023), filling immediate staffing gaps but introducing new demands around intercultural management. Both expert respondents emphasise that the Polish hospitality market is growing strongly in demand terms but failing to develop the human capital needed for sustainable quality improvement.

Survey data (n=12) show the highest salary mismatch challenge (67%), reflecting intense inter-sectoral wage competition. Training investment (23%) is slightly above the sample average. Green skills receive the lowest priority ratings in the entire sample (mean 3.02/5); knowledge of green certification standards (2.25/5) and carbon footprint monitoring (2.08/5) are among the lowest-rated items across all countries. Recovery is the strongest in the sample: 67% report full recovery or growth.

The Polish evidence illustrates the distinctive combination of strong demand recovery and persistent structural human capital deficit that characterises Central-Eastern European tourism. The sector is growing rapidly in commercial terms but not developing the workforce foundations needed for sustainable quality improvement. Breaking this combination requires training and recognition frameworks that can operate in environments of high turnover and multicultural workforce composition, which is precisely the operational context that the RESKILL platform is designed to address.

3.6 Spain

Spain is one of Europe's most important tourism economies. Social Security affiliations in tourism reached 2,855,255 in October 2025, up 3.5% year-on-year and representing 13.8% of total national employment (Turespaña, November 2025). The end of 2025 recorded a historic annual peak of 2.75 million affiliates, up 2.4% on 2024. Spain received a record 93.8 million international visitors in 2024. Permanent contracts now account for 80.6% of tourism employment, reflecting the impact of the 2021 Labour Reform, and this represents the thirteenth consecutive quarterly increase in the permanent contract share. It should be noted, however, that legal permanence does not always translate into income or schedule stability: fixed-discontinuous contracts and variable working hours remain widespread in tourism, so a substantial share of the workforce on permanent contracts continues to experience earnings and schedule volatility linked to seasonal demand.

The PESTEL analysis (Barcelona and Catalonia, December 2025) identifies anti-tourism movements and regulatory change, immigration law complexity, high cost of living, and over-tourism as the dominant structural forces. The focus group (CETT Barcelona, December 2025) articulates a central tension: the sector has more clients than ever, but working conditions have not evolved at the same pace. Participants note that today's professionals expect to work in order to live, seeking equilibrium and benefits beyond salary. The concept of emotional salary (non-monetary job satisfaction dimensions including schedule quality, team environment, and sense of purpose) is identified as increasingly important for attraction and retention alongside competitive remuneration. It should be acknowledged that the qualitative evidence for Spain (PESTEL, focus group, and foresight workshop) is

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concentrated in Barcelona and Catalonia, which limits national representativeness; findings are therefore most directly applicable to high-pressure metropolitan and over-touristic destinations and should be generalised to the wider Spanish context with caution.

The Barcelona foresight workshop produced four future scenarios structured around over-tourism pressure and cost of living, with digital skills and emotional resilience highlighted as cross-scenario priorities. For each scenario, participants produced detailed skills profiles and training recommendations. Survey data (n=34) show the highest wage competition adoption (60%) and the highest lack of qualified candidates challenge (62%). Work-life balance initiatives are the most commonly cited attractiveness measure (70.6%). Training investment is the highest in the sample (29%); this should be read as leading within a generally low-investment European context, where no partner country exceeds 29%, rather than as a strong absolute level of training provision. Worker wellbeing and burnout, although implicit in the over-tourism analysis and in the focus group articulation of emotional salary, deserve more explicit attention: while work-life balance initiatives are widely reported (70.6%), specific health and wellbeing programmes are mentioned by only 17.6% of respondents, indicating a gap between general work-life rhetoric and concrete organisational practices such as scheduling autonomy, participatory management, and predictable rest periods. Recovery: 68% report full recovery or growth.

Spain emerges from this evidence as a leading yet still structurally constrained case in the European tourism workforce landscape. The combination of labour contract reform (80.6% permanent contracts), the highest training investment in the sample, the explicit articulation of emotional salary as an employer value proposition, and active engagement with over-tourism management places Spain ahead of the other partner countries on several dimensions of structural reform. These advances are nevertheless tempered by persistent constraints: the prevalence of fixed-discontinuous contracts and variable hours qualifies the gain in permanent contract share; the regional concentration of the qualitative evidence in Catalonia limits national generalisability; and even the highest training investment in the sample remains modest in absolute terms. On this reading, the lessons from Spain are directly relevant to the design of policy instruments for the broader European context, while the trajectory of structural change in the Spanish tourism workforce should be considered ongoing rather than completed.

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4. Cross-Country Analysis by Institutional Cluster

This section constitutes the primary analytical contribution of the report. The cluster framework pools national samples into groups where statistical comparisons are more robust and institutional context provides interpretive coherence. All percentages refer to the pooled cluster sample unless otherwise specified.

The analysis in this section moves through four subsections. The first three examine each cluster in turn, describing the shared institutional features that define it, the distinctive survey patterns it produces, and the key within-cluster divergences that complicate any simple generalisation. The fourth subsection addresses the meta-question of what the cluster framework explains and where its analytical limits lie. Tables 2 and 3 provide the quantitative backbone for the cluster comparisons; the qualitative evidence cited throughout provides the interpretive layer that statistics alone cannot supply.

4.1 Nordic-Continental cluster: Finland and Germany (n=50)

Finland and Germany share institutional features that shape their tourism labour markets similarly: relatively strong collective bargaining frameworks that constrain individual wage-setting, long VET traditions that provide structured pathways into skilled occupations, and demographic pressures (ageing populations, declining youth cohort availability for service employment) that tighten labour supply in ways that no level of wage adjustment can fully resolve. These shared features produce a distinctive survey pattern. Wage competition is markedly lower than in the other clusters (18% Finland, 28% Germany), compared to 35-59% in the Southern European cluster and 42-49% in the Central-Eastern European cluster. Flexible working conditions dominate as a staffing strategy (60% Finland, 55% Germany). Investment in work environment improvement is more prominent than elsewhere.

German respondents lead the entire sample on environmental sustainability practices, reflecting stronger regulatory requirements, developed consumer expectations, and greater employer sustainability awareness. Green certification (22.5%) far exceeds all other national rates. Despite institutionally favourable conditions for training investment, actual provision is among the lowest in the sample: training investment as a staffing strategy is reported by only 15% of German respondents and 18% of Finnish respondents. The dominant barrier is operational time constraint (62.5% Germany). Recovery rates are low in both countries (30% Finland, 38% Germany), the lowest in the sample.

Within-cluster divergences are significant. Finland is constrained by the near-complete collapse of Russian tourist flows since 2022, creating a structural demand shortfall in Lapland and border regions that domestic tourism cannot quickly compensate. Language barriers are more acute in Finland (50% of respondents cite language skill deficiencies as a recruitment challenge) than in Germany (34%), reflecting the specific challenge of Finnish as a service language in a sector increasingly reliant on immigrant workers. Germany shows stronger employer branding development at the sector level and higher automation uptake, while Finnish enterprises more frequently report work environment improvement as a staffing strategy (64% Finland vs 24% Germany). Both countries face the same underlying challenge: in labour markets where service roles are widely perceived as a temporary or supplementary occupation rather than a genuine career path, recruitment and retention require a combination

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of competitive wages, schedule quality, and visible professional development that most SMEs currently struggle to deliver.

The Nordic-Continental cluster also presents the starkest illustration of the gap between institutional quality and sectoral outcomes. Both Finland and Germany have the institutional infrastructure (strong VET systems, collective bargaining coverage, developed sustainability culture) that the other two clusters are often advised to emulate. Yet both show the lowest recovery rates in the sample (30% and 38% respectively) and training investment that is lower than several Southern and Central-Eastern European enterprises, despite higher aggregate capacity to sustain it. This finding challenges simple narratives about institutional quality as a sufficient condition for sectoral resilience, and suggests that even the most well-endowed institutional contexts require specific, targeted intervention in the tourism sector to translate structural capacity into actual workforce quality and stability.

4.2 Southern European cluster: Italy and Spain (n=57)

Italy and Spain share a Mediterranean employment pattern characterised by high seasonality, persistent structural shortages, strong geographic concentration of tourism activity, and a large share of fixed-term and seasonal employment. Both have experienced strong post-pandemic demand recovery driven primarily by international arrivals, but neither has resolved underlying workforce challenges. Wage competition is substantially higher than in the Nordic-Continental cluster (Spain 59%, Italy 35%; pooled average approximately 49%), reflecting weaker collective bargaining coverage and more intense candidate scarcity. Lack of qualified candidates is the leading recruitment challenge in both countries (65% Spain, 48% Italy). Over-tourism, particularly in Barcelona and island destinations, creates labour intensity peaks incompatible with the work-life balance expectations of a contemporary workforce.

Both countries adopt operational sustainability measures widely but have low green certification rates (Italy 4%, Spain approximately 10%). Training investment is higher in Spain (31%) than Italy (17%), and Spain's 2021 Labour Reform has achieved structural improvement in contract permanency (80.6% permanent) not yet replicated in Italy. The primary within-cluster divergence lies in the composition of recruitment challenges: seasonality dominates in Italy (48%); candidate scarcity dominates in Spain (62%). Both the Italian focus group and the Spanish focus group describe the same fundamental tension: the sector has recovered commercially but has not recovered the workforce stability required to sustain service quality over time.

The qualitative evidence from both countries converges on the theme of career pathway visibility as a critical missing element. In Italy, in-depth interviews describe a widespread assumption among younger people that tourism employment is either seasonal, transitional, or both, and that there is no credible trajectory from an entry-level hospitality position to a skilled professional role. In Spain, the focus group participants describe a generational shift in expectations: workers under 35 no longer accept the traditional hospitality culture of unconditional availability, and enterprises that cannot offer predictable schedules, clear progression criteria, and a meaningful sense of purpose are losing competitive ground in the recruitment market regardless of their wage levels. Both countries identify digital skills development, particularly in AI-assisted service and online reputation management, as a rapidly growing priority that their current VET systems are not yet adequately addressing.

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The Southern European cluster is also distinctive in the intensity of the over-tourism challenge, which has no equivalent in the other two clusters. In Barcelona, the combination of record international arrivals, rising housing costs driven partly by tourism-related development, and growing anti-tourism sentiment has created a social and regulatory environment that directly affects the attractiveness of hospitality work. Workers in over-tourism destinations must navigate the additional emotional labour of managing guest interactions in contexts where the destination itself is contested. This dimension of service work is not captured in conventional skills surveys but is explicitly raised in the Spanish focus group as an emerging training need: workers need the emotional resources and interpersonal skills to maintain service quality and professional demeanour in environments where both guests and local residents may express frustration or hostility towards the tourism sector. The RESKILL platform can address this need by incorporating scenario-based modules specifically designed for high-pressure, high-conflict service interactions.

The comparison between Italy and Spain within the Southern European cluster also reveals an important lesson about the pace of structural change. Spain achieved a significant improvement in contract permanency through legislative reform within a relatively short period (2021-2025), demonstrating that structural change in employment conditions is feasible even in a sector historically resistant to it. The Italian labour market has not undergone an equivalent reform, and the difference in contract permanency rates (80.6% in Spain vs substantially lower in Italy) is reflected in the qualitative evidence: Spanish employers describe a qualitatively different relationship with their permanent workforce than Italian employers describe with their predominantly temporary one. The Spanish experience provides both a model and an evidence base for analogous reforms in Italy and in other Southern European countries where seasonal and fixed-term contracts remain the dominant form of hospitality employment.

4.3 Central-Eastern European cluster: Lithuania and Poland (n=63)

Lithuania and Poland share an institutional context shaped by rapid economic convergence with Western European income levels, generating intense inter-sectoral wage competition for labour. Collective bargaining coverage is low in both countries (Lithuania 26.6%, the lowest in the sample). Both have faced significant inflows of Ukrainian workers since February 2022, filling immediate staffing gaps while introducing new demands around intercultural management. Salary mismatch is the dominant recruitment challenge (67% Poland, 47% Lithuania), far above the rates in the other two clusters.

Strong post-pandemic demand recovery (67% Poland, 51% Lithuania) coexists with persistent workforce instability, high turnover, and difficulty retaining experienced candidates. In Poland, expert respondents describe workers leaving positions after days rather than months, creating a cycle in which training investment is deterred by turnover uncertainty. Lithuanian focus group participants describe younger workers treating tourism employment as transitional, expecting work-life balance conditions that the sector does not reliably provide. The focus group also notes a generational dimension: participants under 35 who entered hospitality in the post-pandemic period have significantly higher expectations around autonomy, flexible scheduling, and professional recognition than earlier cohorts, and are more willing to change sectors if those expectations are not met.

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A distinctive feature of this cluster is the prominence of implicit on-the-job training as the primary mode of skills transfer. In environments where formal training is organisationally impossible for most SMEs, supervisors and experienced colleagues transmit practical knowledge through daily supervision, correction, and informal mentoring. This learning is unrecognised and undocumented but constitutes the primary mechanism through which new entrants acquire the competencies they need. Polish expert respondents independently confirm that soft skills are developed primarily through professional experience rather than formal programmes, and that the absence of recognition frameworks for this experiential learning is a significant barrier to career progression and mobility. Lithuania and Poland diverge principally in tourism geography (Vilnius-concentrated vs. diversified Polish market), in the scale of Ukrainian worker integration, and in the role of cross-border labour mobility. In Lithuania, the risk that trained workers will move to higher-wage destinations in Western Europe adds an additional constraint on training investment that has no direct equivalent in the Polish context.

4.4 What the clusters explain and where national variation remains

The most consistent finding across all three clusters is the dominance of flexible working conditions as the primary staffing strategy (48-60% adoption, a 12-point spread). This convergence suggests flexibility has become a pan-European structural response to workforce challenges across all institutional contexts, regardless of collective bargaining coverage, wage level, or recovery trajectory. The specific content of flexibility varies: in Nordic-Continental contexts it tends to mean schedule predictability and work-life integration; in Southern European contexts it more often means schedule variability to accommodate demand peaks and seasonal patterns; in Central-Eastern European contexts it reflects competitive pressure to match the flexibility offered by other sectors competing for the same workers. In contrast, wage competition shows the widest variation of any strategy in the sample (49-point spread: Finland 10% to Spain 59%). This pattern is entirely consistent with the institutional cluster framework: countries with stronger collective bargaining frameworks adopt wage competition less frequently. The regression analysis in the related academic manuscript finds an odds ratio of 3.5 ($p<0.01$) for the association between cluster membership and wage competition strategy adoption, controlling for enterprise size and sub-sector. This is the strongest and most theoretically coherent quantitative finding of the study.

The cluster framework is analytically productive but not deterministic. Within each cluster, there is real and meaningful national variation. Some phenomena that initially appear nationally specific prove on closer examination to be present across all clusters: the recognition-implementation gap in sustainability is described in all six countries in structurally similar terms; the dominance of time constraints as a training barrier is found everywhere regardless of institutional context; and the consistent priority of soft skills over green and digital competencies holds across all six national surveys. Table 3 illustrates one of the most analytically informative patterns in the dataset: salary mismatch as a recruitment challenge follows the cluster structure almost perfectly, highest in the Central-Eastern European cluster (67% Poland, 47% Lithuania), moderate in the Southern European cluster (35% Spain, 22% Italy), and lowest in the Nordic-Continental cluster (40% Finland, 22% Germany). Seasonality challenges peak in the Southern cluster; language deficiencies peak in the Nordic-Continental cluster. This cross-cluster pattern in the composition of recruitment

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challenges has direct implications for training content design: the same platform cannot address all challenges equally across all contexts, and cluster-specific content differentiation is necessary for practical relevance.

Table 2. Key staffing strategies by country (% of respondents).

Strategy (%)	FIN	GER	ITA	LIT	POL	ESP	Pattern
Flexible conditions	60	55	48	53	50	50	Convergent (48-60%)
Wage increases	10	28	35	49	42	59	Divergent by cluster
Training investment	10	13	13	10	17	29	Low across all

Source: RESKILL Project survey data (2025).

Table 3. Recruitment challenges by country (% of respondents).

Recruitment challenge (%)	FIN	GER	ITA	LIT	POL	ESP	Pattern
Lack of qualified candidates	30	70	44	53	33	62	Universal
Salary mismatch	30	20	17	47	67	32	Highest in Central-East.
Seasonality issues	30	25	48	18	33	35	Highest in Southern EU
Language deficiencies	40	33	26	18	17	9	Highest in Nordic-Cont.

Source: RESKILL Project survey data (2025).

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5. Thematic Findings: Social and Environmental Sustainability in Tourism Workplaces

This section examines six thematic areas that together constitute the social and environmental sustainability landscape of European tourism SMEs. Each theme is examined through the combined lens of quantitative survey evidence, qualitative sources, and national context. The six themes are not independent: they are deeply interconnected, and the relationships between them, particularly between labour market sustainability, training investment, skills development, and the recognition-implementation gap, constitute the central analytical narrative of the report. Section 6 draws the thematic threads together into an integrated diagnosis; the present section provides the evidential foundation for that synthesis.

5.1 Labour market sustainability

The most consistent finding across all six national contexts is the structural nature of workforce shortages. Lack of qualified candidates is the most frequently cited recruitment challenge overall (93 mentions across 170 respondents), leading in Germany (70%), Spain (65%), and Lithuania (53%), and significant in Italy (48%) and Poland (42%). These figures reflect not a cyclical fluctuation but a persistent gap between available labour supply and employer needs that predated the pandemic and has been intensified since. High employee turnover compounds candidate scarcity: employers in all countries describe difficulty retaining workers beyond initial employment periods. In Poland, expert respondents describe workers leaving positions after days or hours; in Spain, the focus group describes the commercial recovery as occurring without workforce stability recovery; in Lithuania, participants describe younger workers treating tourism employment as inherently transitional. The combination of persistent scarcity and high turnover creates a self-reinforcing spiral in which investment in training is deterred by uncertainty of retention, skill levels stagnate, and sectoral attractiveness declines further. Overall, approximately 53% of sampled enterprises report full recovery or growth; recovery rates range from 30% (Finland) to 68% (Spain) and 67% (Poland).

The structural nature of workforce shortages is further evidenced by the geographic patterns of mismatch within countries: vacancies concentrate in Lapland and coastal regions in Finland while registered unemployed workers are concentrated in urban centres; in Germany, a similar regional imbalance affects Schleswig-Holstein; in Spain, over-tourism concentration in Barcelona and island destinations creates demand peaks that exhaust local labour supply. These geographic dimensions require targeted regional responses that national-level statistics alone cannot address.

A further dimension of the labour market sustainability challenge is the visible deterioration in the quality of recruitment pipelines over time. Across the qualitative evidence, employers describe increasing difficulty not only in filling positions but in finding candidates with the basic interpersonal and service orientation competencies that previous cohorts typically possessed on entry. The German focus group notes that many young people now entering hospitality training programmes have very limited practical exposure to service environments and require substantially more foundational orientation than was the case a decade ago. Italian expert interviewees describe a similar observation: the cultural expectation that hospitality work requires unconditional availability, emotional investment, and customer priority is less widely shared among younger workers, creating a values mismatch that goes beyond wage levels or working conditions. This observation is not an argument against employing younger

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workers; rather, it is a signal that the sector must become more intentional and systematic about onboarding and early development if it is to convert new entrants into committed professionals rather than losing them within months of hiring.

5.2 Skills for sustainable workplaces

The RESKILL survey asked employers to rate the importance of 35 specific competencies across green (10 items), digital (12 items), and soft skills (13 items) domains on a 5-point scale. A consistent cross-national hierarchy emerges: soft skills are rated highest overall (mean 4.18/5), followed by digital (3.90/5), with green skills rated lowest (3.57/5). This ordering holds in every country without exception. Soft skills consistently top the priority ranking. Service design thinking, adaptability to change, empathy and emotional intelligence, and conflict resolution appear in the top tier across all contexts. Lithuanian respondents show the highest soft skills ratings (4.40/5); Finland (4.45/5) and Spain (4.22/5) follow closely. The German focus group and Polish expert respondents independently identify the deficit in interpersonal competencies among younger entrants as the most pressing human capital challenge.

Digital skills show strong demand, particularly for commercially relevant applications: e-commerce and booking systems (rated 4.90/5 in the Finnish workshop), social media management, data analysis, and online reputation management. Green skills receive the lowest investment priority but show important cross-national variation: Finnish respondents rate environmental awareness (4.60/5) and resource efficiency (4.50/5) highly; Polish respondents rate carbon footprint monitoring (2.08/5) and green certification knowledge (2.25/5) at the very bottom of the 35-item dataset. The variation in absolute rating levels is greater for green skills (range: 0.94 points) than for soft skills (range: 0.48 points), confirming that green skills priority is more strongly shaped by national regulatory context and consumer market composition.

Table 4. Skills domain mean importance ratings by country (1-5 scale).

	FIN	GER	ITA	LIT	POL	ESP	Avg
Green skills	3.96	3.63	3.28	3.76	3.02	3.74	3.57
Digital skills	4.27	3.77	3.41	4.04	3.74	4.17	3.90
Soft skills	**4.45**	**3.98**	**3.96**	**4.40**	**4.03**	**4.23**	**4.18**

Source: RESKILL Project survey data (2025).

The cross-country mean scores in Table 4 can be complemented by a comparative view of the specific competencies rated most important in each national sample. Table 5 presents the top three priority skills in each domain (green, digital, soft) for each partner country, drawn from the national skills-needs analysis compiled in RESKILL Milestone 3. Countries are ordered by institutional cluster to support cross-cluster comparison. The comparative profile shows a substantial convergence at the top of each domain (resource efficiency, online reputation or e-commerce, adaptability to change) alongside country-specific accents that reflect the

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national conditions documented in Section 3. This profile should be read as a priority indication for training content design rather than as an absolute ranking, as minor score differences in modest-size samples are not interpretable in inferential terms.

Table 5. Top three priority skills by domain and country, ordered by institutional cluster.

Country	Cluster	Top 3 green skills	Top 3 digital skills	Top 3 soft skills
Finland	Nordic-Continental	1. Environmental awareness (4.60) 2. Resource efficiency and waste management (4.50) 3. Ecological impact assessment (4.00)	1. E-commerce and online booking systems (4.90) 2. Customer Relationship Management (CRM) systems (4.60) 3. Social media management and analytics (4.50)	1. Adaptability to change (4.80) 2. Networking and stakeholder collaboration (4.70) 3. Leadership in multicultural teams (4.60)
Germany	Nordic-Continental	1. Resource efficiency and waste management (4.10) 2. Environmental awareness (4.03) 3. Renewable energy usage in hospitality (3.77)	1. E-commerce and online booking systems (4.40) 2. Digital marketing and SEO for destinations (4.08) 3. Social media management and analytics (4.08)	1. Adaptability to change (4.40) 2. Conflict resolution and complaint handling (4.40) 3. Creativity and innovation (4.35)
Italy	Southern European	1. Resource efficiency and waste management (3.70) 2. Renewable energy usage in hospitality (3.57) 3. Environmental awareness (3.39)	1. Online reputation and review management (4.17) 2. Social media management and analytics (3.78) 3. Digital marketing and SEO for destinations (3.74)	1. Adaptability to change (4.48) 2. Multilingual proficiency (4.30) 3. Empathy and emotional intelligence (4.30)
Spain	Southern European	1. Resource efficiency and waste management (4.12) 2. Environmental awareness (4.03) 3. Renewable energy usage in hospitality (3.94)	1. Data analysis and interpretation (4.65) 2. Online reputation and review management (4.56) 3. Customer Relationship Management (CRM) systems (4.47)	1. Adaptability to change (4.68) 2. Empathy and emotional intelligence (4.62) 3. Conflict resolution and complaint handling (4.38)
Lithuania	Central-Eastern European	1. Resource efficiency and waste management (4.22) 2. Sustainable event management (4.18)	1. Online reputation and review management (4.53) 2. Social media management and analytics (4.41)	1. Creativity and innovation (4.67) 2. Empathy and emotional intelligence (4.63) 3. Adaptability to change (4.63)

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		3. Renewable energy usage in hospitality (4.04)	3. Digital marketing and SEO for destinations (4.35)	
Poland	Central-Eastern European	1. Sustainable event management (3.67) 2. Resource efficiency and waste management (3.50) 3. Environmental awareness (3.33)	1. Social media management and analytics (4.33) 2. E-commerce and online booking systems (4.33) 3. Data analysis and interpretation (4.25)	1. Empathy and emotional intelligence (4.58) 2. Adaptability to change (4.58) 3. Conflict resolution and complaint handling (4.33)

Source: RESKILL Milestone 3 (MS3) national survey tables, 2025.

The implications of this skills hierarchy for training design are direct and consistent across all national contexts. Any platform or programme that prioritises green or digital skills without first establishing a foundation of soft competencies risks building on unstable ground: workers who lack the interpersonal capacity to manage customer interactions effectively cannot be expected to translate digital tools or sustainability practices into service quality improvements. The evidence also points to a sequencing logic: soft skills develop the adaptive capacity that enables workers to learn, adjust, and apply new competencies over time, making them an investment in the conditions for all subsequent learning rather than simply one skills category among others. This sequencing principle should be reflected explicitly in the architecture of the RESKILL platform and in the sector-level guidance provided to employers.

It is also notable that the skills hierarchy identified in this study is consistent with the findings of prior European research on tourism workforce competencies, including the Next Tourism Generation (NTG) Alliance studies and CEDEFOP analyses of green skills in vocational education. The cross-national consistency of the soft-digital-green hierarchy across the RESKILL sample, which spans six countries with very different labour market institutions, regulatory environments, and economic development stages, substantially strengthens the evidence base for this ordering and suggests it reflects genuine sectoral needs rather than national cultural preferences or survey design artefacts.

5.3 Environmental sustainability practices

Across the sample, the most widely adopted environmental measures are operational: waste reduction and recycling (43-75% by country), reduction of single-use plastics (57-72.5%), and energy efficiency (39-62.5%). Formal green certification is strikingly rare: Germany 22.5%, Spain approximately 10%, Italy 4.35%, and the remaining countries at or below 5%. Staff training on sustainability is reported by 13% of Italian respondents, 40% of German respondents, and approximately 20-30% elsewhere. The qualitative evidence from all six countries identifies sustainability as a growing guest expectation but describes a consistent gap between what guests expect and what most SMEs can currently deliver. In Nordic-Continental contexts sustainability is more deeply embedded as a brand and regulatory requirement; in Central-Eastern European contexts it remains primarily at the awareness stage.

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The gap between operational sustainability and strategic sustainability commitment is particularly visible in the comparison between practice adoption rates and certification rates. In Germany, 75% report waste reduction but only 22.5% hold green certification; in Italy, 57% report reduction of single-use plastics but only 4% hold certification. The barrier to certification is not primarily a lack of underlying practice but a lack of the administrative capacity, time, and financial resources required to navigate certification processes in a SME context. A policy implication follows directly: accessible, low-burden certification pathways specifically designed for small enterprises would convert existing operational engagement into formal recognition without requiring enterprises to change what they already do. Even where operational practices are adopted, the workforce competency dimension of the sustainability transition remains largely unaddressed: workers implement sustainability measures without systematic preparation, limiting both the effectiveness of those measures and the development of deeper green competencies that the twin transition will require.

A qualitative finding that cuts across all six national contexts is the description of sustainability as a guest-facing rather than workforce-facing priority. Employers across all countries describe sustainability measures primarily in terms of what guests expect to see: recycling bins, plastic-free amenities, local food sourcing, and energy-efficient facilities. Very few employers describe sustainability as something that the workforce internalises, practices independently, or advocates for within the enterprise. This orientation towards compliance and appearance rather than genuine competency development reinforces the gap between operational measures and strategic commitment, and suggests that the workforce dimension of the sustainability transition requires specific investment in values and knowledge alongside the adoption of operational practices. The RESKILL platform has an opportunity to address this gap by embedding sustainability not as a stand-alone module but as an integrated element of all service and management scenarios.

5.4 Training investment and barriers

Training provision in European tourism SMEs is substantially below the level required to sustain workforce quality. Fifty-three per cent of respondents describe their provision as occasional or non-existent. Training investment as a staffing strategy is the lowest-adopted measure in the entire survey, reported by between 12% (Lithuania) and 31% (Spain) of respondents. The dominant barrier in every country is lack of time due to operational constraints, cited by between 33% (Lithuania) and 75% (Poland) of respondents. This is structurally determined: tourism is a high-contact, real-time service industry in which staff cannot be released from operational duties during peak periods, and peak periods now constitute the majority of the working calendar in many enterprises. Cost is a secondary barrier (15-28%), and high staff turnover further reduces the return on investment calculation: employers are reluctant to invest in workers who may leave within weeks, and workers who do leave take their newly acquired competencies with them to competitors or to other sectors.

A distinctive finding surfaced by Lithuanian evidence and confirmed across multiple national qualitative sources is the widespread practice of implicit on-the-job training. In micro-enterprises where formal training is organisationally impossible, supervisors and experienced colleagues transmit practical knowledge through daily supervision, correction, feedback, and informal mentoring. This mode of learning is rarely recorded and never formally accredited, but constitutes the primary mechanism through which new entrants

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actually acquire the competencies they need. Polish expert respondents independently confirm that soft skills are developed primarily through professional experience rather than formal programmes, and that the absence of recognition frameworks for this experiential learning is a significant barrier to career progression and mobility. Recognising implicit training as a legitimate form of skills development has important implications for the design of the RESKILL platform: tools that support, structure, and formally recognise the supervisor-worker knowledge transfer relationship may be more impactful than traditional training programmes requiring dedicated time and physical attendance. Format preferences consistently favour short, modular, scenario-based learning accessible in brief intervals and immediately applicable in the next shift. Germany's focus group specifically raises the importance of micro-credentials that can be accumulated and recognised without requiring extended study leave.

The relationship between turnover and training investment deserves particular attention, as it creates a well-documented strategic failure. Employers who do invest in training report that the benefit accrues not only to the enterprise that invests but, through workers who subsequently change jobs, to the sector as a whole. Where individual enterprises bear the full cost and share the benefit with competitors, the private return on training investment is below its social value, creating a systemic underinvestment that cannot be resolved through individual employer decisions alone. Sector-level training funding mechanisms, in which enterprises contribute collectively and benefit collectively, address this market failure. Several European countries have developed such mechanisms in other service sectors; their extension to tourism, particularly in the form of paritetic training funds managed jointly by employer associations and trade unions, would represent a significant structural improvement in training financing.

5.5 Workplace attractiveness and strategic responses

Fair wages and benefits are identified as the most important single attractiveness measure across the sample, cited by between 40% (Finland) and 82.5% (Germany) of respondents by country. Work-life balance initiatives are widely cited as an attractiveness measure (Germany 62.5%, Spain 70.6%, Poland 41.67%, Lithuania 27.45%), consistent with qualitative evidence that work-life balance has become a non-negotiable expectation for younger workers entering the labour market. The Spanish focus group notes that today's professionals expect to work in order to live, seeking equilibrium and benefits beyond salary. Career development pathways are cited by 35% of Spanish respondents but substantially lower rates elsewhere, despite being identified in virtually all qualitative sources as a critical driver of long-term retention. Health and wellbeing programmes are reported by 27.5% of Germany respondents and 25% of Poland respondents, reflecting a pandemic-related awareness of occupational health that has begun to translate into organisational practices.

The evidence suggests a sector beginning to understand the multi-dimensional nature of worker expectations but not yet systematically equipped to address them. Wage increases are necessary but insufficient: qualitative evidence from all six countries shows that workers who leave the sector do not cite wages as the sole reason. The combination of unpredictable scheduling, limited career visibility, physical and emotional demands, and the social prestige of service roles creates an accumulated deterrent that no single measure can address. A coherent employer value proposition articulating what the sector offers in terms of career

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development, lifestyle compatibility, team culture, and purpose is emerging as best practice among more innovative hospitality enterprises in Germany and Spain, but has not yet diffused broadly to the SME segment that constitutes the overwhelming majority of the sector.

The concept of inclusion and diversity policies appears in the workplace attractiveness data with moderate frequency (approximately 25-30% of respondents across several countries), and the qualitative evidence suggests its significance is growing. In Poland, the presence of Ukrainian workers has made diversity a practical operational reality for one quarter of all hospitality enterprises. In Germany, the strategic importance of attracting workers from diverse backgrounds is explicitly discussed in the Kiel interviews as an element of long-term workforce sustainability. In Spain, the focus group notes that the sector's historical gender imbalances are slowly shifting as more women enter management roles, though inequality in working conditions for front-line workers remains significant. The development of genuinely inclusive workplaces is not only an ethical requirement but a practical one: enterprises that attract workers from a wider range of backgrounds, life experiences, and professional trajectories will be better positioned to address the structural labour shortages that all six partner countries face.

5.6 The recognition-implementation gap

The single most important structural finding of this study is the recognition-implementation gap: the consistent distance between what employers acknowledge as important (sustainability, digital readiness, skilled workforces, career development) and what the data shows they actually implement. This gap is not a matter of dishonesty. It reflects a structural condition in which the operational pressures of a labour-scarce, demand-driven sector systematically crowd out the investment and planning required to act on what is recognised as necessary. Employers recognise the importance of green skills but invest in green competency training less than any other area. They acknowledge soft skills as the most critical human capital gap but provide substantially less training than would be required to address it. They understand that career pathways drive retention but lack the organisational capacity to design and maintain them within SME constraints.

The recognition-implementation gap is found in similar form across all six countries regardless of institutional cluster, strongly suggesting it is a sectoral feature rather than a context-specific failure. The Spanish focus group notes that the sector asks for commitment without offering a future. German interview respondents describe a cycle in which short-term operational imperatives prevent the long-term investments that would reduce those very pressures. Polish respondents describe a sustainability awareness that remains superficial because the internal organisational conditions for genuine implementation do not yet exist. Lithuanian participants identify the same pattern in training: employers know training is important but cannot find the time or structure to make it happen. Solutions must therefore address the underlying organisational conditions that produce the gap, not only provide information or financial incentives to enterprises that already recognise what is needed.

Understanding the recognition-implementation gap requires distinguishing between different types of barriers. Financial barriers, while real, are not the primary explanation: the survey evidence shows that cost is a secondary constraint behind time in all six countries, and the enterprises that most consistently invest in training and sustainability are not always the

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largest or most profitable. Organisational capacity barriers are more fundamental: SMEs typically lack dedicated HR functions, training coordinators, or strategic planning capacity, meaning that even well-intentioned employers have no organisational mechanism for converting intention into action. Informational barriers also play a role: many employers are aware that training and sustainability are important in general but lack specific knowledge of what training is available, how to access it, and how to sequence investments given their particular workforce composition. The RESKILL platform has the potential to address all three types of barrier simultaneously: by providing content in formats that overcome organisational constraints, by making relevant training accessible and discoverable, and by reducing the financial threshold through subsidised or sector-funded access.

A final observation on the recognition-implementation gap is that it is asymmetric across the three skills domains. The gap is widest for green skills, where recognition of strategic importance is high but resourcing is low; moderately wide for digital skills, where adoption of commercially relevant applications is higher but strategic investment in workforce digital capability remains patchy; and narrowest for soft skills, where the gap between recognition and action is partly bridged by the implicit learning processes described in Section 5.4. This asymmetry has design implications: closing the green skills gap requires a different set of interventions (primarily format accessibility and integrated curriculum design) than closing the digital skills gap (primarily content relevance and practical application) or the soft skills gap (primarily recognition frameworks for existing learning). The RESKILL platform must address all three gaps but with distinct approaches calibrated to the nature of each.

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6. Integrated Evidence: Survey, PESTEL, Focus Groups, Workshops

6.1 What the mixed-methods approach reveals

The value of the mixed-methods design lies in the convergence and productive tension across independent sources. Three forms of methodological triangulation characterise the evidence in this report. Confirmatory triangulation occurs when multiple methods independently produce the same finding: the dominance of flexibility as a staffing strategy, the priority of soft skills over digital and green, and the recognition-implementation gap are all confirmed by survey data, qualitative sources, and workshop outputs independently. Explanatory triangulation occurs when qualitative evidence explains the mechanisms behind quantitative patterns: the survey shows that wage competition is low in the Nordic-Continental cluster, and the focus groups and PESTEL analyses explain why (collective bargaining creates institutional floors that make individual wage competition both unnecessary and constrained by regulation). Extending triangulation occurs when qualitative sources surface phenomena not captured in the quantitative instrument: the role of implicit on-the-job training, the specific content of the recognition-implementation gap, and the divergence between national and urban or rural labour markets within countries are all findings that emerge from qualitative sources alone and are not visible in survey aggregates.

The mixed-methods approach also reveals the limits of each individual method. The survey provides statistical distribution and cross-national comparability but cannot explain why patterns exist or what they mean in practice. The PESTEL analyses provide macro-structural context but cannot capture enterprise-level decision-making or worker-level experience. The focus groups provide interpretive richness and collective meaning-making but cannot be generalised. The in-depth interviews provide depth of expert knowledge but reflect individual perspectives. The workshops provide normative orientation and future vision but are shaped by the particular participants and facilitation context. The combination of all these sources, when consistent, provides a level of evidential confidence that no single method could achieve. The analytical principle throughout this report has been to foreground findings where multiple sources converge, to treat single-source findings as preliminary and indicative, and to be explicit about the limitations of each evidence base when interpreting results.

6.2 Six integrated findings

Finding 1: Labour shortage is structural. The combination of official statistics, survey data, and qualitative evidence across all six countries confirms that workforce shortages predate the pandemic, were deepened by it, and are not resolved by demand-side recovery. They reflect a persistent spiral of candidate scarcity, high turnover, wage uncompetitiveness relative to other sectors, and a deteriorating occupational image that the sector's own operational pressures prevent it from addressing. No partner country in this study reports progress sufficient to suggest the problem is being resolved; all six describe it as their primary ongoing operational challenge.

Finding 2: Soft skills are the universal foundation. Across all countries, sub-sectors, enterprise sizes, and institutional contexts, soft skills are rated as the highest-priority investment area. Survey, focus groups, interviews, and workshops confirm this independently and consistently. No country, cluster, sub-sector, or enterprise size deviates from this finding. Tools that

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develop, recognise, and validate soft competencies including communication, emotional intelligence, adaptability, and service design thinking are the highest-priority human capital investment for the sector and should form the foundation of any training framework regardless of national context.

Finding 3: Green transition is recognised but not resourced. Environmental sustainability is acknowledged as a strategic priority across all six national contexts and by employers across all three institutional clusters. However, the distance between recognition and resourcing is wide and consistent. Green skills receive the lowest investment priority; certification is rare outside Germany; staff sustainability training is limited even in countries where operational practices are well developed. The sector recognises the direction of travel but lacks the capacity, organisational structure, and in some contexts the financial resources to make the transition at the pace that climate objectives, regulatory requirements, and guest expectations will increasingly demand.

Finding 4: Training is blocked by operational pressure, not absence of need. The dominant barrier to training across all countries is lack of time due to operational constraints, cited by between 33% and 75% of respondents. This is a structural feature of labour-scarce, real-time service delivery that requires format innovation (micro-learning, embedded training, implicit learning recognition) at least as much as financial subsidy. Solutions that increase the financial accessibility of training without addressing its operational incompatibility will produce modest gains at best. Platform design that fits within operational realities rather than requiring enterprises to step outside them is the primary design challenge for tools such as RESKILL.

Finding 5: Flexibility converges; everything else diverges by cluster. The adoption of flexible working conditions as the primary staffing strategy is the one genuinely convergent finding across all three institutional clusters, with adoption rates ranging from 48% to 60%. Everything else (wage competition ranging from 18% to 59%, training investment from 12% to 31%, sustainability practices, skills priorities, and recovery trajectories) varies substantially by cluster and by country. European policy instruments must be differentiated by institutional context to be effective; a single approach will fit none of the three clusters adequately.

Finding 6: The path forward is sector-specific embedded training. The training most needed is sector-specific in content, embedded in the operational context rather than requiring extraction from it, modular and stackable in format, and designed to recognise the implicit learning that already occurs through daily supervision and peer interaction. It must address the full skills spectrum but prioritise soft skills as the foundation on which digital and green competencies are built. It must be designed for the cluster-specific conditions of each national context rather than imposing a one-size-fits-all framework. And it must create portable, recognised credentials that make the time workers invest in learning visible to future employers, reducing the structural barrier that keeps training investment below its socially optimal level.

Taken together, these six findings constitute a coherent diagnosis. The labour shortage and turnover crisis is both a cause and an effect of the training deficit. The soft skills gap is both a recruitment and a retention challenge. The green transition gap and the recognition-implementation gap both reflect the same underlying structural condition: operational pressures systematically crowd out strategic investment. The institutional

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diversity of the six-country context means no single intervention can address all dimensions simultaneously; but the convergence on flexibility and the universal priority of soft skills provide a common platform from which differentiated approaches can be built.

6.3 Implications for the RESKILL platform and training design

The evidence gathered through WP2 generates four concrete implications for the design of the RESKILL micro-training platform. First, the platform must be designed for the operational reality of SMEs: short modules (5-15 minutes) that can be completed in brief windows between service periods, with mobile-first accessibility, scenario-based content simulating actual service situations, and immediate applicability. Second, the platform must recognise and build on implicit learning. Tools for recognising, documenting, and validating experiential competency acquisition alongside formal training completion would address a genuine gap in current recognition systems, with particular significance in the Central-Eastern European cluster where formal training provision is lowest.

Third, differentiated skills profiling tools should be embedded in the platform to enable employers to identify specific workforce gaps, match them to relevant training content, and track development over time. The cluster-level analysis in this report provides the diagnostic basis for differentiated profiling: Nordic-Continental enterprises have different skills investment priorities than Southern or Central-Eastern European ones. Fourth, sustainability competencies must be integrated into all training content rather than siloed into separate green skills modules. Environmental practices, resource efficiency, and sustainability mindset are most effectively developed when presented as features of daily work (customer service decisions, supply chain choices, operational management) rather than as a separate domain.

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7. Conclusions and Recommendations

7.1 Summary of evidence

This report has examined the social and environmental sustainability of tourism workplaces across six European countries through an integrated mixed-methods study combining survey evidence from 170 SMEs, PESTEL analyses, focus groups, in-depth expert interviews, and foresight workshops conducted between October 2025 and February 2026. The evidence converges on a clear picture: European tourism SMEs face a structural workforce challenge that is deepening despite strong post-pandemic demand recovery, and they are operating with training and sustainability investment levels substantially insufficient to address that challenge.

The challenge has multiple interacting components: persistent candidate scarcity, high turnover, wage uncompetitiveness relative to growing sectors, deteriorating sectoral image, and a recognition-implementation gap that prevents acknowledged priorities from translating into action. These components reinforce each other in ways that make piecemeal solutions unlikely to succeed. The labour shortage and turnover crisis is both a cause and an effect of the training deficit: employers do not invest in training because they cannot retain staff long enough to recoup the investment, and the absence of training makes the sector less attractive to quality candidates who would otherwise choose to build careers in more development-oriented environments. The green transition gap and the recognition-implementation gap both reflect the same underlying structural condition: operational pressures systematically crowd out strategic investment in a sector where margins are thin, peak seasons are intense, and skilled labour is perennially scarce.

The cluster framework has proven analytically productive: it reveals that wage competition is institutionally determined, that flexibility is a pan-European convergence, and that the composition of recruitment challenges differs systematically across institutional contexts. These insights have direct implications for policy differentiation: instruments designed for a single European context will be effective in some clusters and counterproductive in others. At the same time, the cross-cluster consistencies (the universal priority of soft skills, the dominance of time constraints as a training barrier, the recognition-implementation gap) identify the features of tourism as a sector that generate common patterns regardless of national institutional environment. These consistencies provide the common analytical platform from which differentiated policy and training responses can be designed.

At the same time, the evidence points to real resources and strengths to build on. Flexible working conditions are already widely adopted and can be deepened in ways that improve both worker wellbeing and enterprise competitiveness. Soft skills are universally recognised as the foundation of service quality, providing clear direction for training content priorities. Implicit on-the-job learning is a real and significant vehicle for competency development that policy and platform design can structure, formalise, and make portable through micro-credentials. And across all six partner countries, there is a genuine commitment among many employers, workers, and stakeholders to a more sustainable, professionally rewarding, and socially dignified tourism sector.

It is worth noting explicitly that the six national contexts documented in this report represent not only challenges but also genuine laboratory conditions for innovation. Finland is already piloting micro-credential frameworks in the hospitality sector. Germany has the institutional

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depth in VET and collective bargaining to design sector-level training funds that could serve as models for other European countries. Spain has achieved a structural improvement in contract permanency that can inform labour policy design in Italy and other Southern European destinations. Lithuania and Poland are developing practical responses to the challenge of training a multicultural, mobile, and rapidly growing workforce that will have lessons for all European tourism labour markets as demographic pressures intensify. The evidence gathered through RESKILL provides both the diagnostic basis and the comparative perspective needed to draw on these national innovations and scale what works.

It is worth noting explicitly that the six national contexts documented in this report represent laboratory conditions for innovation as much as they document challenges. Finland is piloting micro-credential frameworks in the hospitality sector. Germany has the institutional depth in VET and collective bargaining to design sector-level training funds that could serve as models for other European countries. Spain has achieved a structural improvement in contract permanency that can inform labour policy design in other Southern European destinations. Lithuania and Poland are developing practical responses to the challenge of training a multicultural and rapidly growing workforce that will have lessons for all European tourism labour markets as demographic pressures intensify. The evidence gathered through RESKILL provides both the diagnostic basis and the comparative perspective needed to draw on these national innovations and scale what works.

7.2 Recommendations for policy

Differentiated, cluster-sensitive instruments. European and national policy instruments must reflect the institutional diversity documented in this report. In the Nordic-Continental cluster, where collective bargaining already provides wage floors and VET systems offer structured career pathways, the priority is format innovation in training provision (embedding learning in operational routines rather than requiring scheduled absence), employer branding campaigns to rebuild the sector's attractiveness to qualified young people, and linguistic inclusion strategies to integrate the growing immigrant workforce. Investment in sector-level coordination between VET institutions and tourism industry associations would also help align curriculum design with the operational realities and skills profiles identified in this study. In the Southern European cluster, the priorities are continued labour contract reform building on the Spanish model, career pathway formalisation and visibility, public investment in accessible skills profiling and certification infrastructure, and dedicated support for enterprises navigating over-tourism pressures that are generating both commercial opportunity and social tension. In the Central-Eastern European cluster, where rapid economic convergence is creating inter-sectoral wage competition that tourism cannot easily win on monetary terms alone, the priority is support for implicit learning recognition, intercultural management development to address the integration of Ukrainian and other migrant workers, and wage floor mechanisms (through collective bargaining extension or sectoral agreements) that reduce the competitive gap without requiring individual SMEs to absorb unsustainable cost increases.

Recognition of implicit and non-formal learning. European and national frameworks for micro-credentials and competency recognition should be extended to cover experiential workplace learning, enabling workers to validate competencies developed through daily practice. The European Credit System for Vocational Education and Training (ECVET) and

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the European Qualifications Framework (EQF) provide the architecture; what is needed is sector-specific operationalisation for tourism that acknowledges what supervisors teach and workers learn through daily service interaction. This would both improve individual career development opportunities and create more accurate pictures of workforce capability for planning and recruitment purposes, with particular significance in the Central-Eastern European cluster where formal training provision is lowest and implicit learning is most prevalent.

Targeted sector-level support for the green transition. Financial support through energy efficiency subsidies, co-funded sustainability audits, and accessible SME-specific certification pathways would reduce the cost and complexity of sustainability investment. The evidence from this study suggests that many SMEs already have operational practices that would qualify for certification; the barrier is administrative capacity and cost, not underlying engagement. Low-burden certification pathways designed for small enterprises would convert existing operational engagement into formal recognition at scale. Regulatory frameworks should provide a credible and predictable sustainability trajectory so that employers can plan rather than face sudden compliance demands that exceed their current capacity.

Investment in sectoral image and career pathways. The image deficit documented across multiple national contexts, particularly in Finland, Germany, and Poland, is a policy-relevant variable that is currently deteriorating and requires active, coordinated intervention. Industry associations, education institutions, and public authorities should collaborate on communication campaigns presenting tourism careers as professional, valued, and progressive, directly addressing the perception that hospitality offers only temporary or low-status employment. More substantively, national and European qualification frameworks should create clear and visible career progression routes within the sector, enabling workers to see long-term development trajectories. Without visible career pathways, retention strategies based on wages and flexibility alone will remain insufficient.

Cross-border coordination for labour mobility. The presence of significant numbers of workers from Ukraine in Polish and Lithuanian tourism, and the growing reliance on immigrant workers in Finnish and German hospitality, signals a structural shift in how European tourism labour markets function. Policy frameworks that facilitate the recognition of qualifications across borders, support the language and cultural integration of immigrant workers, and address the bureaucratic barriers to legal and productive employment will become increasingly important as demographic pressures tighten national labour supplies. The RESKILL project six-country consortium is itself a practical model for the kind of cross-national coordination that policy must support at scale.

7.3 Recommendations for training

Format: embedded micro-training as the operational standard. The dominant training barrier is time, not cost or motivation. Any training model that requires workers to leave their operational role for extended periods will fail to reach the majority of the target population in a labour-scarce sector. Modules of 5-15 minutes, designed around specific service scenarios and decisions that workers face in their daily roles, offer the best combination of time efficiency, content relevance, and immediate applicability. Providers of tourism training should prioritise this format over traditional classroom or extended e-learning models that are

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structurally incompatible with the operational realities of most tourism SMEs. The recognition of implicit learning through micro-credentials that can be accumulated over time provides an additional mechanism: formal training and informal workplace learning become complementary rather than competing pathways to competency development.

Content: soft skills first, green and digital integrated. The consistent cross-national finding that soft skills are the highest priority investment area should be directly and explicitly reflected in training content architecture. Communication, emotional intelligence, adaptability to change, service design thinking, and customer orientation should constitute the core of any sector-wide training framework. Green and digital skills should be integrated into this core rather than positioned as separate domains. Digital tools that support sustainable operations, customer service scenarios that embed environmental responsibility, process design content that develops analytical thinking alongside practical skills, and management training that builds inclusive leadership for multicultural teams all enable multiple competency development simultaneously within the time constraints of SME operators. Integrating rather than siloing also makes training content more relevant and immediately transferable to the complex, multi-dimensional service situations that tourism workers actually face.

Assessment and evidence generation. A dimension of training design that this study evidence strongly supports, but which is frequently neglected in practice, is the systematic documentation and assessment of training impact. Enterprises that cannot demonstrate the effect of their training investments on workforce stability, service quality, or productivity will find it difficult to justify continued investment, particularly in conditions of financial constraint. The RESKILL platform should incorporate lightweight, embedded assessment tools that capture competency development over time, enabling both individual workers to track their progress and employers to see the aggregate impact of their training investment on workforce capability. This evidence base will also be essential for making the case to policymakers for sustained public investment in sector-level training infrastructure.

Scalability and peer learning. Tourism SMEs are typically too small to sustain internal training functions; without external infrastructure, the sector will remain trapped in under-investment. Sector-level consortia, industry associations, and cluster organisations should be supported as vehicles for shared training delivery, enabling economies of scale in content development, platform maintenance, and the peer learning dynamics that individual SMEs cannot generate alone. Digital platforms enabling workers across multiple enterprises to participate in the same training experience (comparing scenarios, sharing solutions, building professional networks across the sector) offer both efficiency gains and added relational value that enriches the learning experience. Assessment of training impact should be built into platform design from the outset, enabling enterprises to track competency development over time and providing the evidence base for further investment.

7.4 Back-casting to 2030

The back-casting methodology adopted in this study starts from a desired future state and works backwards to identify what changes in current conditions, practices, and infrastructure are necessary to achieve it. The desired future state for European tourism workplaces in 2030 can be described across four conditions: a workforce with the soft, digital, and green competencies required by the twin transition; an employment model offering fair wages,

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predictable schedules, and visible career pathways; an industry that has embedded operational sustainability practices and is advancing towards strategic sustainability commitments; and an adult education infrastructure supporting continuous upskilling in formats compatible with SME operational realities.

From this endpoint, back-casting identifies what needs to change between now and 2030. On workforce competency: training provision must increase substantially in frequency and coverage, shifting dramatically in format towards embedded micro-learning and implicit learning recognition. From the current situation where 53% of enterprises provide occasional or no training to a future where near-universal provision is the norm requires not only financial incentives but format innovation that makes training compatible with operational schedules, and recognition frameworks that make training careerly meaningful for workers. On employment models: contract structures, wage frameworks, and schedule management practices must evolve across all three institutional clusters, in ways differentiated by context but sharing the goal of reducing precarity and increasing career viability. On sustainability: the operational practices currently adopted by more advanced enterprises must become baseline standards for all, while strategic sustainability investment, supported by accessible certification pathways and policy incentives, builds the next layer of commitment. On adult education infrastructure: the RESKILL platform must achieve genuine scale, accessed by tens of thousands of workers, embedded in daily enterprise routines, and recognised within national and European qualification frameworks.

The gap between the current state documented in this report and the 2030 vision is significant but not unbridgeable. The sector already recognises what is needed: the recognition-implementation gap is a gap in capacity and organisational conditions, not in awareness or intention. What is required is the combination of policy support, financial investment, platform design, and organisational innovation that can close the distance between recognition and implementation. Achieving this requires the three elements to reinforce each other: recognition frameworks increase worker motivation to engage with training; sector-level delivery reduces per-enterprise cost; and operational compatibility increases actual participation rates. Each element supports the others. The RESKILL project was designed to contribute precisely to this combination.

7.5 Directions for future research

This exploratory study has established a baseline and identified the primary patterns, tensions, and structural features of European tourism workplace sustainability across six partner countries. Several research directions would strengthen and extend these findings in ways directly relevant to the subsequent phases of the RESKILL project and to the broader European tourism workforce development agenda.

Longitudinal follow-up studies using the same sample would enable dynamic analysis of how the indicators documented here evolve over time, providing a trajectory rather than a snapshot. Repeated measurement at later project milestones would enable assessment of whether platform interventions have produced measurable changes in training provision, skills investment, or sustainability practices. This is particularly important in the Central-Eastern European labour markets, where wage convergence and demographic shifts are creating rapid transitions that a single cross-sectional survey cannot capture. Such

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longitudinal data would also enable proper analysis of the causal relationships between training investment, workforce stability, and service quality that this exploratory design can only describe in correlational terms.

Deeper qualitative research in the Central-Eastern European cluster would address the distinctive dynamics this study has identified but could not fully explore: the mechanisms and organisational conditions of implicit on-the-job training; the integration experience and skills development pathways of Ukrainian workers in Polish and Lithuanian tourism enterprises; and the relationship between rapid economic convergence and sectoral workforce quality. PESTEL analyses for Lithuania and Poland, conducted through primary field research rather than secondary sources, would enrich the national profiles and enable more precise cluster-level policy recommendations.

Skills profiling tool development and validation, a core task of subsequent RESKILL work packages, should be grounded in the competency evidence gathered here and tested across multiple cluster contexts before deployment at scale. The cross-national variation in green skills priority documented in this study provides a specific design requirement: green competency profiling tools should reflect cluster-specific regulatory and consumer market contexts rather than a uniform European framework. Finally, the recognition-implementation gap deserves dedicated theoretical and empirical attention as a research object in its own right. Understanding the specific organisational, financial, and motivational mechanisms that produce and sustain this gap is a prerequisite for designing the next generation of European workforce development instruments that can genuinely close the distance between what employers recognise as necessary and what they are able, in their current conditions, to deliver.

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