



**MDG-F Joint Programme “Alliances for Culture Tourism in
Eastern Anatolia”**

TOURISM TRAINING NEED ASSESSMENT FOR KARS

PREPARED BY

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I - INTRODUCTION

This report is prepared under the patronage of the World Tourism Organization (UNWTO) by Boğaziçi University Applied Tourism Administration and Research Centre.

The aim of the report is to enlighten the areas of training needs for the tourism industry in Kars.

The coverage of the report includes a general outlook at the economic activities carried out in Kars, focusing on the characteristics of the tourism industry in Kars. It also underlines the areas of training needs detailing the recommended trainings for different tourism sub-sectors and managerial levels.

The data used in the report is collected from two main streams. Firstly the relevant written documents and previously prepared work on the subject were reviewed. Secondly, a visit to the area was organized and first hand data was gathered through structured interviews with the stakeholders of the tourism industry. The coverage of the data collection was: representatives of the local administration, owners / managers of hotels, restaurants, travel agencies, non governmental organizations, transportation companies and local residents.

During the field work, the close cooperation of the local administration and tourism establishments was witnessed. Contacted local residents also showed sincere interest in the project and expressed their willingness and enthusiasm to participate in the trainings to be organized.

The time constraint may have limited the data to be collected. For example a more detailed work could be carried out in the villages, especially given the current proposed strategy of the MDG-F joint programme that includes a focus on nature and eco-tourism. But nevertheless the project team believes that a correct and reliable picture has been drawn.

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II - ECONOMIC ACTIVITY IN KARS¹

The locals' main income source is agriculture and animal farming/breeding. High plateaus are suitable for cattle, goats and sheep breeding. Poultry farming and animal products are also an income source for locals. In dairies called Zavod, cheese and other products are made. Kars is famous for its cheese and organic honey; there is a large demand for these products from other cities in Turkey. The organic honey they produce comes from Kars and Ardahan plateaus. Other agricultural products that are produced in Kars are: wheat, sugar beet, barley, potato and oat. Kars has magnetite and asbestos resources, but other than these the city does not have many underground resources. Tourism as a source of income for the region is still in its infancy, although a high potential for this activity exists.

Working Population

Distribution of working people among different sectors

(Numbers are in %)	
Other	0.19
Public services	13.21
Banking, insurance, real estate services	0.49
Logistics, communication and storage industry	1.40
Wholesale, retailer, food & beverage and hotel services	2.66
Construction industry	1.70
Electricity, gas and water services	0.19
Manufacturing industry	2.71
Mining and fishery	0.02
Agriculture and Animal farming/breeding	77.43

Agriculture and Animal Farming/Breeding

Agricultural products that are produced in Kars are: wheat, sugar beet, barley, potato, oat, beans, green lentil, cucumber, onion, parsley and lettuce. Most of the products are only enough for the regional consumption. In recent years advanced agriculture equipments are being used in order to increase effective production.

Since agricultural production is limited due to the geographic features and climate effects locals use animal farming as an income source. Still modern methods or equipments are not in use and most families only produce for their own needs. Other than Kars cheese none of the products are being marketed outside of the city. Honey is produced in 35 villages and the amount of honey produced a year is 121 tons.

¹ The statistics and information obtained in this section has been provided to the researchers by the local administrators in Kars.

Industry

Kars has been developing its industry; many small and mid sized factories are being opened. Although there are various factories producing and processing sugar, cement, brick, shoes and dairy products, unemployment and immigration rate is pretty high in the city.

There are five main factories in Kars and an industrial district at Paşaçayır since 1975.

Trade

Kars was an important trade route since early times because of its strategic location. The ruins of Ani, established around 300 BC on the Silk Road, suggest that the area has always been important for trade. It was again after the Russian occupation in 1878 that trade flourished again. As a result of innovations in agriculture, the variety and quantity of products increased. The railway built between Kars and Tbilisi gave the city access to the Caucasian market. On the other hand, trade via Trabzon with other Ottoman cities was cut off, leaving the region dependent on the connection to Russia via Tbilisi. After the end of the Russian occupation, trade in Kars went downhill as the newly established Soviet Union restrained external trade. The railway that connected central Anatolia to Erzurum, which opened in 1939, again gave Kars access to new markets, leading to a revival in production and trade. However, the Akkaya border crossing to Armenia was closed in 1993 following the Karabag problem between Armenia and Azerbaijan, and this freezing of Turkish-Armenian trade relations dealt another blow to Kars.

One of the main obstacles to the economic development of Kars has been the failure to build the new Kars-Tbilisi railway, a project agreed in 1993 that would unite Europe with the Caucasus and Central Asia. If this project comes to life it should lead to acceleration in trade and market relations between regions and continents.

Today, commerce is concentrated in the city centre and heavily relies on agriculture and animal products. Kars honey, kaşar (a Turkish cheese similar to cheddar) and gruyere cheese are the most important products of the city that attract nationwide demand. The livestock trade with other cities is also significant in the summer. As a result of the insufficiency of manufacturing industry, Kars remains dependent on the outside world.

Kars imports from Russia, Azerbaijan, Lithuania, Iran, Holland and Georgia and exports, though on a very limited scale to Iran, Nahcivan, Azerbaijan and Georgia.

The most important trade organizations in Kars are the Chamber of Industry and Trade and the Union of Trade and Craft Chambers.

Health Services

There are three public hospitals in the region: one in Kars, one in Sarıkamış and one in Kağızman. There is also a specific hospital for birth and child care and a private policlinic in Kars. Other than these facilities, there are seven village clinics in various villages around the region.

Tourism

A more detailed outlook at the employment situation in the tourism industry is provided in the next sections of the report. In this section, visitor statistics are provided for a better understanding of the current situation of tourism in the region.

Number of Domestic and Foreign Visitors who Accommodate in the Properties Which Have Tourism Operating Certificate

Year	Domestic	Foreign	Total
2000	32,551	5,002	37,553
2001	32,653	5,056	37,709
2002	35,350	7,300	42,650
2003	37,213	7,512	44,725
2004	38,214	6,541	44,755
2005	40,021	6,527	46,548
2006	41,257	6,520	47,777
2007	42,517	7,512	50,029
2008	44,321	7,852	52,173
2009	55,746	9,343	65,089

Number of Domestic and Foreign Visitors who Accommodate in the Properties Certified by the Municipality

Year	Domestic	Foreign	Total
2000	16,742	541	17,283
2001	16,976	606	17,582
2002	17,355	874	18,229
2003	18,752	657	19,409
2004	18,543	782	19,325
2005	19,127	1,202	20,329
2006	19,854	1,253	21,107
2007	21,354	1,314	22,668
2008	22,347	1,458	23,805

Number of Visitors to Kars Museum

Year	Domestic	Foreign	Total
2000	4,501	1,506	6,007
2001	3,956	3,855	7,811
2002	2,270	2,909	5,179
2003	2,860	1,160	4,020
2004	3,330	1,850	5,180
2005	4,130	1,230	5,360
2006	3,555	1,020	4,575
2007	It was closed because of construction	-	-
2008	4,982	1,162	6,144
2009	5,364	427	5,791

Number of Visitors to Ani

Year	Domestic	Foreign	Total
2000	1,635	2,816	4,451
2001	3,854	4,378	8,232
2002	3,492	8,150	11,642
2003	7,350	5,985	13,335
2004	5,460	4,110	9,570
2005	8,870	4,890	13,760
2006	6,215	4,555	10,770
2007	4,821	5,347	10,168
2008	5,259	8,402	13,661
2009	7,520	5,920	13,440

III- SWOT ANALYSIS OF KARS

Based on the collected data and on site observations, the following conclusions can be drawn:

Strengths

- Natural and historical resources for alternative tourism
- Accommodation facilities in the city centre and ski centres.
- Highways between other cities and towns are improved.
- Historical location, silk road
- Direct flights to Kars
- Locals are open for developments
- NGOs dealing with women issues that are active and include many members

Weaknesses

- Tourism attractions, facilities are not well known or recognized internationally
- Insufficient number of high quality accommodation facilities, most of them offer low or moderate standards
- Low education level of the tourism workforce
- High turnover rate of employees
- Most restaurants don't meet the international quality standards
- Insufficient number of international flights to Kars
- Lack of demand for railroads
- Loss of workforce due to immigration
- There is no single NGO dealing with tourism issues
- Ski centres are far from the city and isolated. The market for tourists that are coming for skiing and tourists who want to travel the city are not easily combined so this is a disadvantage for locals who work in the tourism industry.
- Lack of marketing
- Seasonality of the tourism activities currently carried out in the region

Opportunities

- Demand is increasing from countries such as Russia, Azerbaijan and Georgia
- Possible opening of the Armenian border
- Not affected by the global warming like other destinations

Threats

- Bias towards terrorism and lack of security
- Accessibility difficulties due to winter conditions

IV- METHODOLOGY USED TO COLLECT PRIMARY DATA

This section aims to describe the methodology used to collect primary data regarding the composition of the tourism sector in Kars and the need for training of the different sub-sectors.

The data was collected mainly through participant observation during the field research, as well as structured interviews or questionnaires carried out to the following:

- Hotel owners / general managers: the structured interviews were carried out with the managers of 8 different hotels in Kars and Sarıkamış. The list of these hotels is provided in table 1 in the next section. Hotel owners were asked the following questions:
 - Vision of the business
 - Views regarding the future of Kars
 - Expectations from local administrators
 - Expectations and views regarding the local community
 - Training needs for their staff
- Restaurant owners / managers: the structured interviews were carried out with the managers of 9 different food and beverage establishments. The list of these establishments is provided in table 2 in the following section. The following questions were asked:
 - Vision of the business
 - Views regarding the future of Kars
 - Expectations from local administrators
 - Expectations and views regarding the local community
 - Training needs for their staff
- Local administrators: structured interviews were carried out with the deputy Governor, the local representative from the Ministry of Culture and Tourism, and a representative from a local NGO. These interviews were directed at obtaining general information about Kars and issues in need of attention.
- A survey was also administered to a convenience sample of 109 local inhabitants. The survey included socio-demographic information, together with several questions to determine the perceptions of the local community regarding the potential for tourism in Kars, as well as their support and views regarding the tourism activity. More detailed explanations are provided in the following section.

V- PROFILE OF STAKEHOLDERS OF TOURISM IN KARS

a. Hotels

There are 16 hotels in Kars. 6 of these are certified by the Ministry of Culture and Tourism.

The classification and bed capacity of these hotels is as follows:

Category	number	bed capacity
5 star	1	380
4 star	2	430
3 star	2	210
2 star	1	102
Total	6	1122

The remaining 10 hotels are certified by the Municipality of Kars. 5 are first class and the other 5 are second class. The total number of beds in these hotels is 520

Together with the Ministry-certified hotels the total number of beds is 1642.

These hotels do not currently possess any quality certifications, including ISO and other commonly used certifications.

Most of the employees are not qualified. The staff working in the front office, housekeeping, food and beverage and service departments have not gone through vocational trainings. The hotels also do not have in-house training programs. Staff is used in all departments, regardless of their employed department. Hotels do not have formal organizational charts and therefore the staff is not aware of their responsibilities.

During the fieldwork participant observations and interviews revealed that most of the employees (at all levels) in accommodation organizations are unqualified/uneducated. Especially in departments like the front office, house keeping and food & beverage, almost all employees are uneducated. Organizations tend to use all employees at all positions. Some of the organizations employ a graduate of a vocational tourism school in their front office and believe that this is enough.

Another important topic that emerged from the fieldwork is that there is almost no level-based differentiation in employment in accommodation units. There is no professional management and the owners of the accommodation units act as general managers. Other than the owner the rest of the personnel can be described as low-level employees. That is to say there are no middle level positions (e.g. middle level managers).

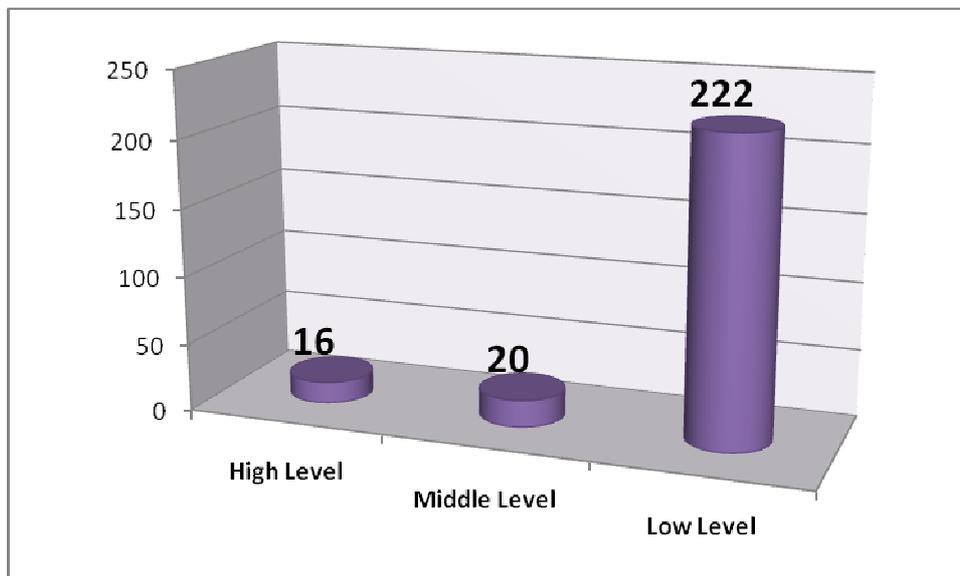
In addition to that the fieldwork also showed that accommodation organizations in Kars do not have clearly defined organizational charts. Thus, the reader of this report should be

informed of the fact that the below table is not the native classification of the local accommodation organizations but is prepared by the researchers for the purposes of this study.

Table 1 – Occupational situation in the accommodation sub-sector

Name of the accommodation organizations	High-level	Middle-level	Low-level	TOTAL
KAR'S HOTEL	1	2	5	8
GRAND ANI HOTEL	2	4	43	49
KERVANSARAY HOTEL	1	0	3	4
KARABAĞ HOTEL	1	0	13	14
SİMER HOTEL	1	4	25	30
YILDIRIM HOTEL	1	0	2	3
ÇAMKAR OTEL (SARIKAMIŞ)	2	5	43	50
TOPRAK HOTEL (SARIKAMIŞ)	7	5	88	100
TOTAL	16	20	222	258

Figure 2 – Distribution of employees in the accommodation organizations serving to the local and international guests



In addition to the ones mentioned above, there are also a few more low-profile hotels in central Kars that provide very cheap accommodation to people who come to Kars from the villages and the neighbouring regions to conduct trade.

The fieldwork also revealed that there are two hotels in Kars that act as night clubs and provide illegal services (prostitution). Surprisingly, one of these hotels is rated with 3-stars, which is considered a middle-level hotel according to the 5-star hotel rating system in Turkey. It is not clear how that hotel was able to get a 3-star rating but the rating of this hotel obviously protects it from the inspection of the local security forces (police).

Visions of the Accommodation Organizations

The field researchers asked the owners of all eight hotels operating in Kars about the vision of their businesses. The selected responses are listed below:

- *“In a place like Kars our services should be considered very modern”*
- *“This hotel was founded to accommodate the guests visiting Kars”*
- *“We exist to give good accommodation services”*
- *“When the conditions are right, we will increase the capacity of our hotel”*
- *“We will make Kars the capital of tourism”*
- *“We want to combine the traditional values of our regions with the ever developing standards of tourism sector and become a good/successful model for the city of Kars”*

The Opinions of the Owners/Managers of the Accommodation Organizations about the Future of Kars (Selected comments from the interviews)

- *“We believe that Kars can have an important role in tourism in the future if the necessary investments –idea and structure wise- are made, and the tourism organizations are given trainings to increase their capacity.”*
- *“We have potential. We are sufficient in every way.”*
- *“There is no future in Kars. There is a lot of work to do.”*
- *“Unfortunately the government does not provide any investment incentives for Kars.”*

The Complaints and Expectations of the Owners/Managers of the Accommodation Organizations from the Local Government (Selected comments from the interviews)

Sarıkamış Region

- *“The roads are damaged. The fact that the road to Sarıkamış Ski centre (the major ski centre in Kars) is only a narrow pathway explains everything. The municipality doesn’t do any proper cleaning in town. We don’t even have a tourism master plan. Sarıkamış Ski centre was opened in 1995 but it still doesn’t have a refinement facility.”*
- *“Even if the local government is doing something, we don’t feel it. We heard from other people that they established a Kars Tourism Infrastructure Association; unfortunately they do not communicate to us.”*

- *“The government doesn’t give any investment support to the accommodation organizations in Kars. In addition to that the municipality promotes itself rather than the region”.*

Kars Region

- *“We need to promote the city of Ani better. It is not enough to build a road to Ani.”*
- *“First of all the local government needs to understand what tourism is. The central/national government needs to differentiate between regions. While people have already started to swim in the hotels in the south of Turkey at this time of the year, we still have heating costs here. Is the government aware of that?”*
- *“We don’t have a tourism product; that’s why the tourists stay in Kars only for one night at most.”*
- *“Infrastructure is really bad. In both hotels and residential areas, they still use sewage trucks (an old technology)”*
- *“The municipality doesn’t do any proper cleaning in town. The principal of tourism has a responsibility to put pressure on the municipality. They think that printing and distributing a few promotional materials is enough. The fact that a tourist can not get any guidance and information from the tourism information office on a random Saturday creates a very bad image for Kars.”*
- *“The local government should do plans and projects that will support the tourism in Kars. They should be openly communicating with the private sector and NGOs, which are active in the tourism industry. The local government should support their joint projects.”*
- *“The local government offers very cheap accommodation at its own facilities (i.e. Teachers’ House, DSİ Guesthouse). Nobody can expect us to be successful and to profit, if the visitors prefer these state facilities because of their low prices. We can not compete with them.”*
- *“If the local government took good care of Sarıkamış Skiing region, it could be a destination like Davos. It is unbelievable that a skiing region like Sarıkamış which doesn’t have any risk of avalanche and which has special pine trees is not claimed and taken care of. However, the local government talks about Sarıkamış a lot when it comes to external promotion but doesn’t really do anything about the region.”*

The Complaints and Expectations of the Owners/Managers of the Accommodation Organizations about the Local Community (Selected comments from the interviews)

- *“Between 1987 and 1988 Kars hosted 3000 visitor. However, the local community treated the visitors so bad that they never came back again.”*

- *“In general the local community of Kars wants the Armenian border to be opened. If the border is opened Armenians living in other countries like USA, France and Canada will pass through Kars to visit Armenia.”*
- *“The local community creates all the dirt themselves but wants the municipality to clean it up.”*
- *“The local community doesn’t have any tourism consciousness. They are not aware that tourism is a major source of income. It is important for visitors to feel safe when they visit a destination but the attitudes and behaviours of the local community prevent it.”*

The Trainings Demanded by the Accommodation Organizations

- Management
- Food and beverage service and presentation techniques
- Hygiene and sanitation
- Occupational English (English for tourism)
- Kitchen organization (kitchen management)
- Trainings related to formation of a tourism conscious (i.e. sustainable tourism, cultural and historical heritage)
- History of Kars
- Communication
- Marketing
- Methods of accessing to/creating financial resources
- Front office training
- Housekeeping training
- Trainings directed to those working in the transportation sector in Kars (e.g. drivers) such as communication, personal image, sustainable tourism, etc.
- Tourism consciousness training for all the departments of the local government
- Trainings for the people working at historical sites (i.e. ruins of the city of Ani).
- Public relations training

Additional Notes about the Interviews:

During interviews the accommodation organizations' owners were asked whether they experience lack of qualified employees and all of them responded to the question as "Absolutely, yes...in all departments"

The hotels that train their own personnel are afraid that the trained employees may leave, in which case the hotels can not find replacements for them.

Even the hotels with multiple star ratings (3 stars and above) pay minimum wage to their front office employees. Eventually, there is a very high turnover of employees.

The hotel owners/managers complain that they can't attract any qualified tourism employees to Kars. They mention that the qualified personnel demand higher wages and they don't want to live in Kars.

In general the wages are so low that it is almost impossible to find educated and qualified tourism employees to work in Kars. In addition to that the tourism in Kars is seasonal and as a result the hotels employ seasonal and unqualified workers. Those seasonal employees don't see tourism as a permanent occupation and at the end of the tourism season they go back to farming and animal breeding or are unemployed until the next tourism season.

Graduates of vocational tourism school also don't prefer to stay in the tourism industry because of the low wages.

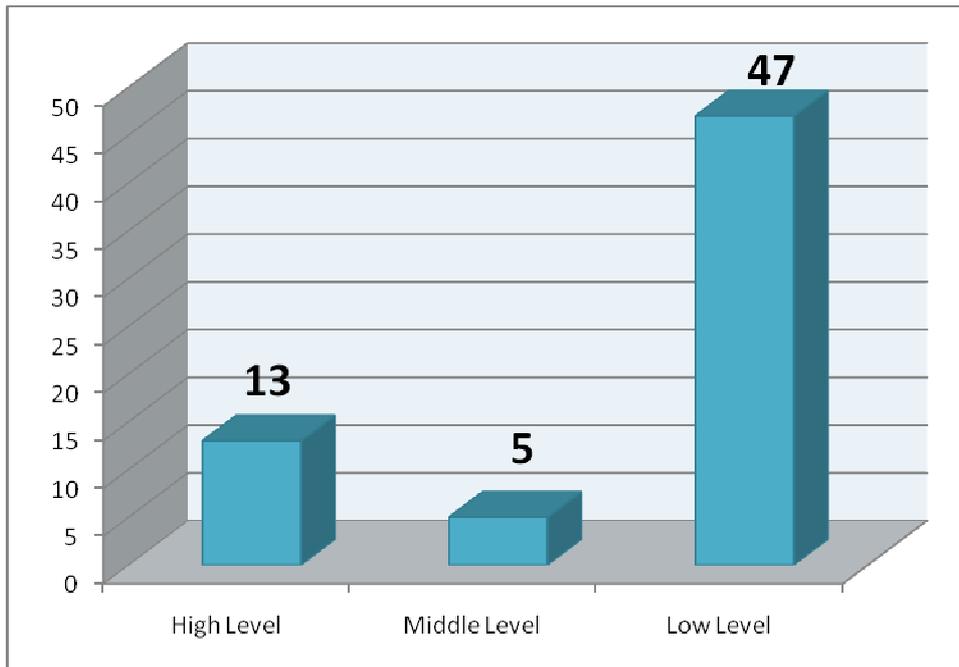
b. Restaurants

During the survey made in Kars, all 9 food and beverage establishments were visited and interviews with their owners were carried out. Based on these interviews the following conclusions were drawn:

Table 2 – Occupational situation in the food and beverage sub-sector

Name of the food and beverage establishments	High-level	Middle-level	Low-level	TOTAL
KAZEVI	2	0	5	7
BİZİM LOKANTA	1	0	2	3
FASIL OCAKBAŞI	1	0	2	3
ŞEHRİZADE OCAKBAŞI	1	0	2	3
HAVUZBAŞI RESTORAN	1	0	3	4
LITA CAFE RESTORAN	2	0	8	10
ANİ OCAKBAŞI	1	0	3	4
KRİSTAL RESTORAN	1	3	4	8
OCAKBAŞI	3	2	18	23
TOTAL	13	5	47	65

Figure 2 – Occupational situation in the food and beverage sub-sector



None of these restaurants have Ministry of Tourism certification. They also do not possess any other quality certifications.

The educational background of the staff working in restaurants is very poor. Most of them have elementary level education. Almost all of them lack the necessary vocational skills. Only two staff from KAZEVI and KRISTAL RESTORAN have attended a skill building training program

Except for two of the restaurants, it is not really possible to categorize the staff as top, middle and lower level. Apart from the owner, all the other staff rank equal.

Restaurants in the city, generally serve the tradesmen and villagers who visit the city on daily basis.

A small portion of them serve the government employees who are based in Kars. Again a small portion serves the middle-upper socio economic class members of the society.

Eating-out is not a common choice. Families prefer to eat at home.

Business lunches and occasional dinners are practiced.

There seems to be a great amount of similarity between the menu items and all of them specialize in kebabs (meat dishes prepared on charcoal fire).

Apart from the salads, there are no vegetable dishes on the menus.

There are two cafes which also have limited menus on main course dishes. Cafes are meeting points for the young population.

Visions of the Food and Beverage Establishments

The field researchers asked the owners of all nine establishments operating in Kars about the vision of their businesses. The selected responses are listed below:

- *“What does vision mean”*
- *“Providing the local and traditional food to the coming guests in the best way; bringing Kars to the place it deserves”*
- *“Our establishment is already giving the best service in Kars”*
- *“Providing the best and more complete service by opening more branches”*
- *“We are already giving a quality service to the Kars elite”*
- *“We are the only one in our field”*
- *“We are thinking of leaving the business”*
- *“We try to provide the traditional local foods”*

The Opinions of the Owners of the Food and Beverage Establishments about the Future of Kars (Selected comments from the interviews)

- *“Unfortunately, intelligent people do not stay in Kars. That is why we are not positive about the future of Kars. In order to see better aspects of Kars we need people from outside that can help us organize. It would be a lie to talk about the future under our current conditions. We see tourism as getting worse in the future. As long as the migration from Kars to large cities such as Istanbul continues, our problems will continue. The untouched places in the area need to be managed by competent hands. On top of this we also have many problems related to infrastructure.”*
- *“We see the future as very good.”*(this positive perspective was only seen in one single respondent)

The Complaints and Expectations of the Owners of the Food and Beverage Establishments from the Local Government (Selected comments from the interviews)

- *“It is essential for the infrastructure works to be finished quickly; it is embarrassing that the water is shut down in a city with such a richness of water resources and with so few inhabitants. The tourists coming to the Ani ruins have the need for toilets and it is embarrassing when they can not find water in the toilets.”*
- *“Kars should be promoted for tourism. It is surprising to have the mayor of the Sarıkamış Municipality to say ‘Let us not promote Sarıkamış too much because if we*

have too many people coming we might then be in trouble'. When we work to provide to the coming tourists the best service possible, it is sad to hear such words."

- *"The government does not provide any help to this place. The travel agencies should work to get tourists to stay. The administration should do something about it."*
- *"We used to have very nice festivals; they should be held again. How bad that Kars does only have a cinema."*
- *"The local administration of Erzurum has a strong lobby. When we see that they use the pictures from Sarıkamış to promote Palandöken it saddens us. Nobody is protecting us."*
- *"The border with Armenia should be open. Maybe then there will be some movement."*
- *"Here there is no administration. Therefore it is wrong to expect something from a non-existent place."*
- *"The local administration takes the arriving guests to some of the establishments. If we have made a mistake they should tell us directly so that we can correct it."*

The Complaints and Expectations of Food and Beverage Organizations about the local Community (Selected comments from interviews)

- *"Our community is self-centred. Nobody is informed about each other here. Our community does not know how to ask for something either. If the local community learns to make money the easy way, they can even mispromote Kars. We need an external body to teach us solidarity."*
- *"The local community does not have buying power. Unfortunately the market is also a bit expensive. Our local community (the local owner) will ask for a lot of money, If you become interested in renting/buying a store that has been empty for years"*
- *"Our local community does not support the local government either. For example the local government worked hard to register the buildings remnant from the Russians, but further action was not taken. Instead of restoring them, they left the buildings to decay. They also banned the local community from doing anything about the buildings. The local community should put pressure on the local government about the restoration of these buildings but nobody says anything."*
- *"The local community neither respects nor supports us".*
- *"The ethnic structure of the local community is also present in the local government and this causes problems. Eventually these problems are reflected on tourism."*

The Trainings Demanded by Food and Beverage Establishments

- Management

- Food and beverage service and presentation techniques
- Hygiene and sanitation
- Occupational English (English for tourism)
- Kitchen organization (kitchen management)
- Trainings related to formation of a tourism consciousness (i.e. sustainable tourism, cultural and historical heritage)
- History of Kars (Interviewee comment: *“Those who do not know their past can not dream of a future!”*)
- Communication
- Marketing
- Effective sales techniques

Additional Notes about the Interviews:

During interviews food and beverage organizations were asked “whether they experience lack of qualified employees” and all of them responded the question as “Absolutely, yes”

They also mentioned that they did not join the trainings previously organized by other institutions either because (1) they were very busy or (2) they did not have any information about the trainings.

Therefore, any training organization should be carefully planned (i.e. training hours, location) and the local community should be informed about the trainings by using all possible means.

c. Travel Agencies

There are 5 travel agencies based in Kars. They all operate in incoming and outgoing tourism activities.

d. Transportation Companies

Local and international tourists arrive Kars mainly through surface travelling. Roads to and in Kars are not in good condition. The roads built 2 years ago are already in bad shape.

There are 7 locally operating bus companies (Doğu Kars, Turgut Reis, Metro, Serhat Kars, Aydoğan-only to and from Samsun, Bingöl- only between Hatay and Kars, Yeşil Artvin)

Minibus (tourists prefer this one).

The conditions of the buses differ from company to company but in general they are in good shape.

The staff working on the buses is not trained and almost all only have grammar school education.

Air travel is frequent. Turkish Airlines, Atlas Jet, Anadolu Jet, and Sun Express have daily services to and from major cities of Turkey, throughout the year.

There are direct flights from Germany and Azerbaijan in the summer season.

Railroad travelling is the least preferred transportation method for Kars. There is one train running between İstanbul and Kars (Doğu Ekspresi) and another one between Ankara and Kars (Erzurum Mavi Ekspres). Because of the conditions and capacities of the trains, travel is long and burdensome.

e. Education Level of the Sector

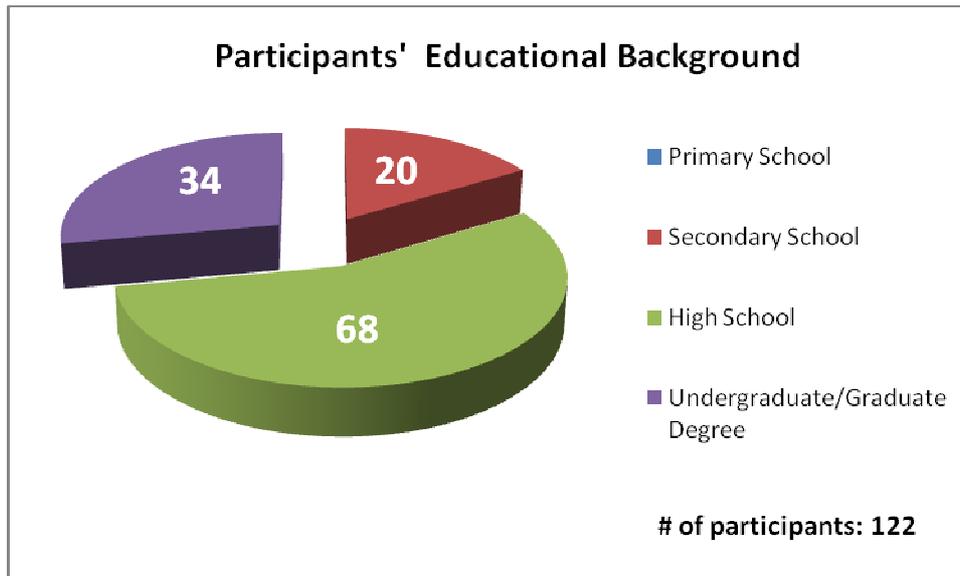
The researchers also tried to ascertain the education level and language skills of those employed in the tourism sector, through interviews with the owners/managers of the establishments. It was established that even those in upper or middle managerial levels do not possess managerial skills and are most of them high school or secondary school graduates. In some of the hotels one or two vocational school graduates are hired at the front-office. Other than that, most of the employees in the hotels are high school or secondary school graduates. The education level of those employed in the food and beverage establishments is even lower, as many of the employees are primary school graduates.

In terms of foreign language, it is reported that the foreign language skills of the front-office personnel at these establishments is very poor, and includes the capability to barely understand and be understood by the foreign tourists, mostly through signing. The exception includes two of the hotels in Sarıkamış that have personnel that possess a certain level of English and German.

The computer skills level of the personnel in the hotels employed in the front office or at the managerial level is basic. They are able to use the set programs that the hotel employs.

Although questionnaires to sector employees were not carried out at this stage, some indication about the education level can be gathered from the profile of attendees to a previous short-education program carried out by some of the researchers in Kars in October 2009. This was a short tourism awareness program carried out through a joint project in which Boğaziçi University participated. This course was attended by 122 people, including a mixed group of employees from hotels, food and beverage establishments, housewives interested in home pension possibilities or looking to open a small tourism business and students from Kafkas University. The figure below shows the education distribution of the participants, where only 34% had university education, most of them being the students that participated in the program. This gives some indication about the low level of education of the current and potential employees of the tourism sector in the Kars region.

Figure - 3



There is one higher education institution in the region, which is the Kafkas University, catering for over 12,000 students. This university includes three two-year vocational programs catering to the tourism and hospitality sectors. These programs are:

- Tourism and Guiding Services, in Kars
- Tourism and Hospitality, in Kars
- Tourism and Hospitality, in Sarıkamış.

There are 300-400 students in all these three programs.

There is also a Community Training Centre in Kars, which is under the responsibility of the Ministry of Education. This centre targets the local community, especially women, with short-term training courses, such as handicrafts, music, etc.

f. Local Administration

Interviews carried out with the Deputy Governor of Kars, the representative in Kars from the Ministry of Culture and Tourism, and the head of one of the local NGOs was useful to obtain an overall perspective on the tourism industry in Kars. Some of the statistics provided earlier were given by these local administrators. Other points that came up during the interviews are explained below.

During the field work, the Deputy Governor of Kars stated that tourism is one of the major source for economical and social development. Unfortunately local resources are not sufficient to develop projects to improve tourism in the city. Apart from financial support, the local administration is ready and willing to support any project to improve the quality of tourism services given in Kars.

The local administration can only do so much with the limited budget that they possess. That is why they are trying to obtain both expert advice and financial resources from outside sources.

The local administrators are aware that in terms of trying to increase the tourism awareness of the sector and the quality of the services they are far from the target and that many mistakes are being made in the implementation of these issues.

g. Tourism Information Services

There is no Tourism Information Office in Kars. This duty is currently performed by the local representation from the Culture and Tourism Office, and the personnel working in their entry office. These personnel do not speak any foreign language and just distribute brochures and promotional material to the incoming foreign tourists. If the tourists have any questions, an employee who speaks a little English is called by phone, and if he is available he comes to the office to answer the tourists' questions.

There are no local guiding services or tourists guides that are accredited by the Ministry of Culture and Tourism. Usually travel agencies bring their own guides if they bring a group to the region.

There are no research or consulting services companies located in Kars.

a. Shopping

There are a few shops where mainly dairy products are sold to tourists in Kars. Souvenirs or handicrafts shops are lacking.

h. Non-Governmental Organizations (NGOs)

There are a total of 256 NGOs in the Kars region. Many of these NGOs are focused on religious objectives. Many of these are also NGOs related to women issues such as the Association of Women Entrepreneur (Kadın Girişimciler Derneği), and are quite active, with membership numbers that can approach 100. There is also an NGO for the handicapped (Engelliler Turizm Geliştirme Kooperatifi), which had an exhibit during the recently held Tourism Week. There is also another NGO that deals with the topic of responsible citizenship (Toplum Gönüllüleri – Society's Volunteers).

There are around 20 NGOs that are related directly or indirectly to tourism. These are typically small organizations with 7-10 members and which are not very active.

The most important tourism related NGOs are:

- KARSOT (Kars Hoteliers Association). This NGO is the most active with 10 members.

- Karturel (Kars Turizm Elçilerin Derneği – Kars Tourism Ambassadors' Association). This NGO has been established very recently, about one month ago and it currently has 24 members. This organization was derived as a result of the project that Boğaziçi University carried out in Kars in October 2009.

- Kltr ve Sanat Derneđi (Culture and Art Association): This NGO has two publications, including a Kars city guide.

- Kars Kltrn Tanıtma Derneđi (Association for the Promotion of Kars' Culture).

- evre Kltr Varlıkları Koruma Derneđi (Association for the Protection of the Environment and Culture)

i. Local Community

In order to understand/evaluate the perceptions of the local community in Kars about tourism, the researchers conducted questionnaires with a diverse sample. The sample is composed 47 female and 62 male participants from the community. The total number of the respondents is 109.

Table 3 – Distribution of the participants based on age and gender

Age Group	Male	Female	Total
0-20	6	11	17
21-40	40	26	66
41-60	13	8	21
61-80	3	1	4
81-100	0	1	1
Total	62	47	109

Figure 4 - Distribution of participants based on age and gender

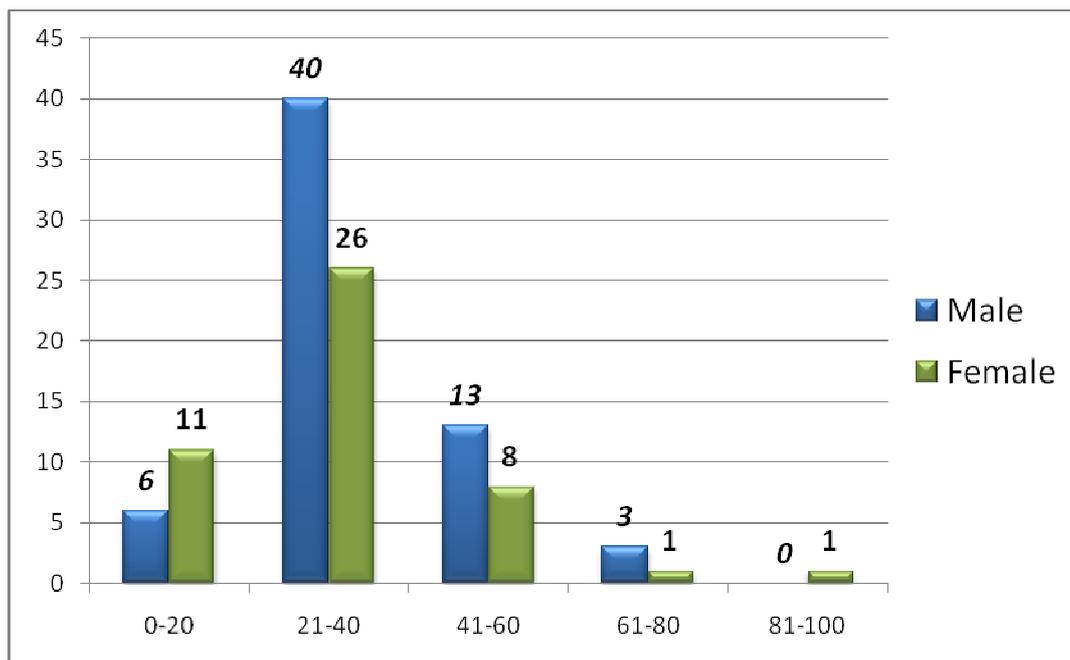


Figure 5 - Distribution of participants based on occupation

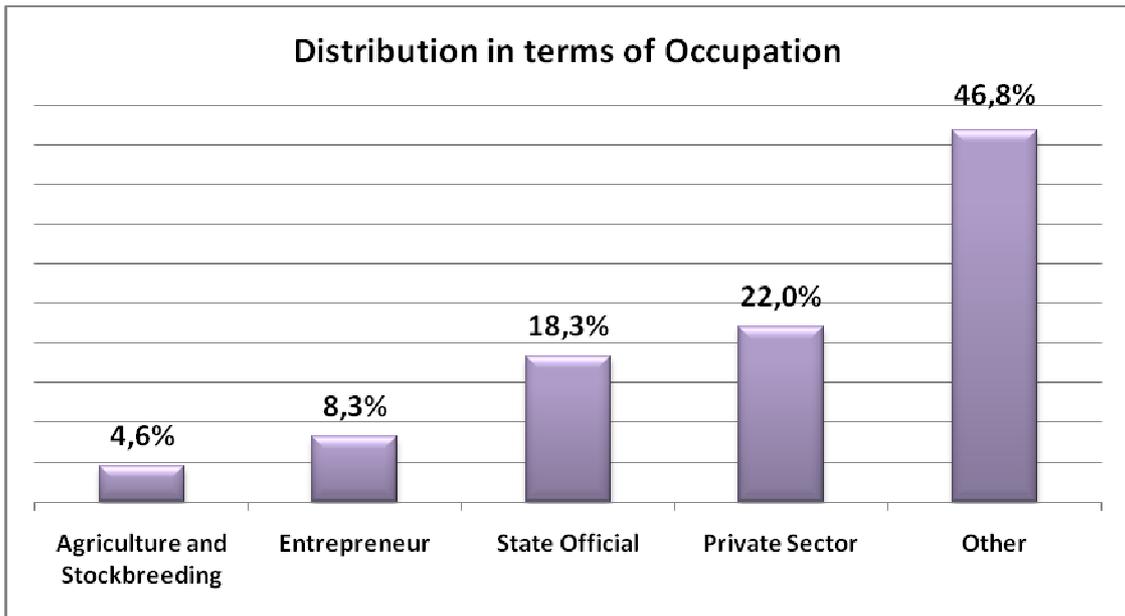


Figure 6 - Distribution of participants based on education

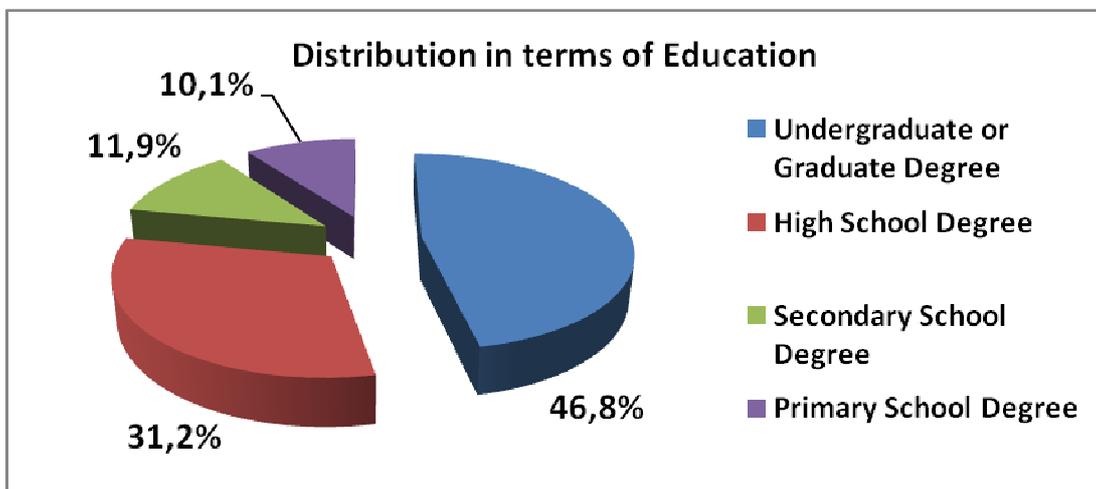


Figure 7 - Distribution of participants based on place of birth

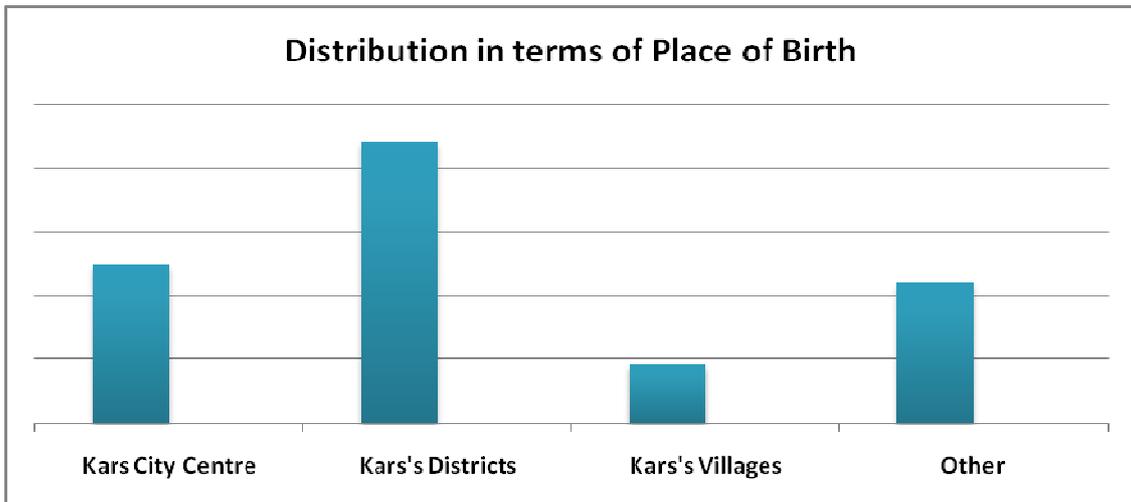
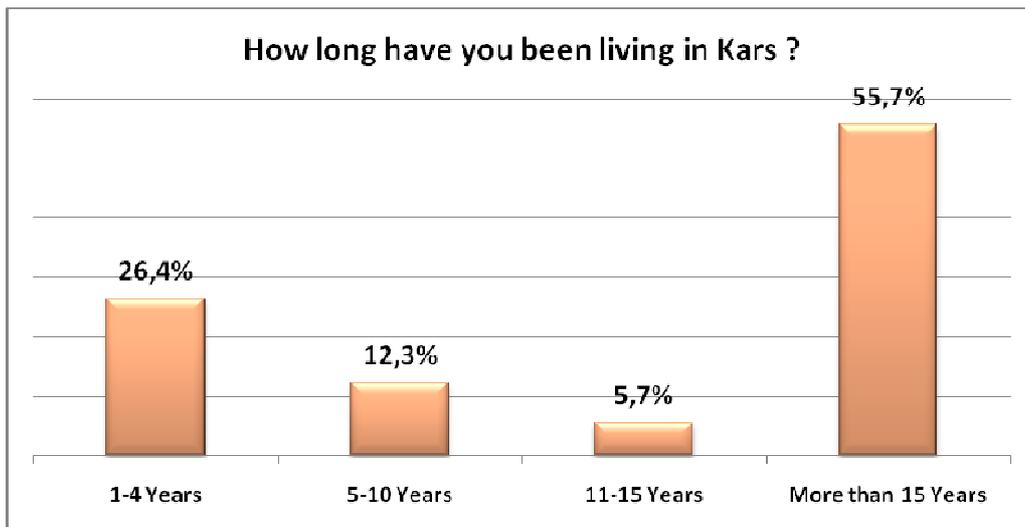


Figure 8 - Distribution of participants based on number of years lived in Kars region



Distribution of the participants' answers on each question:

Figure-9

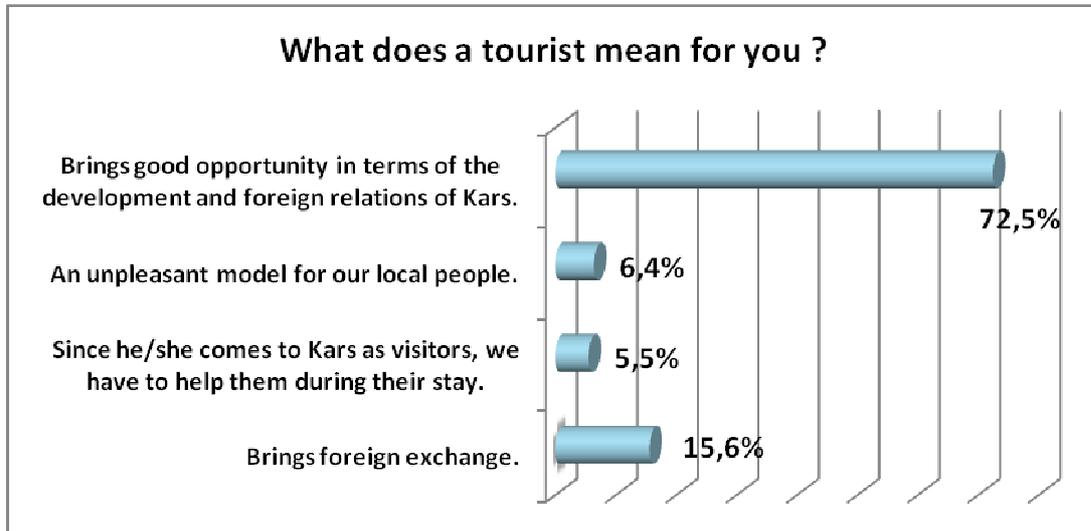


Figure-10

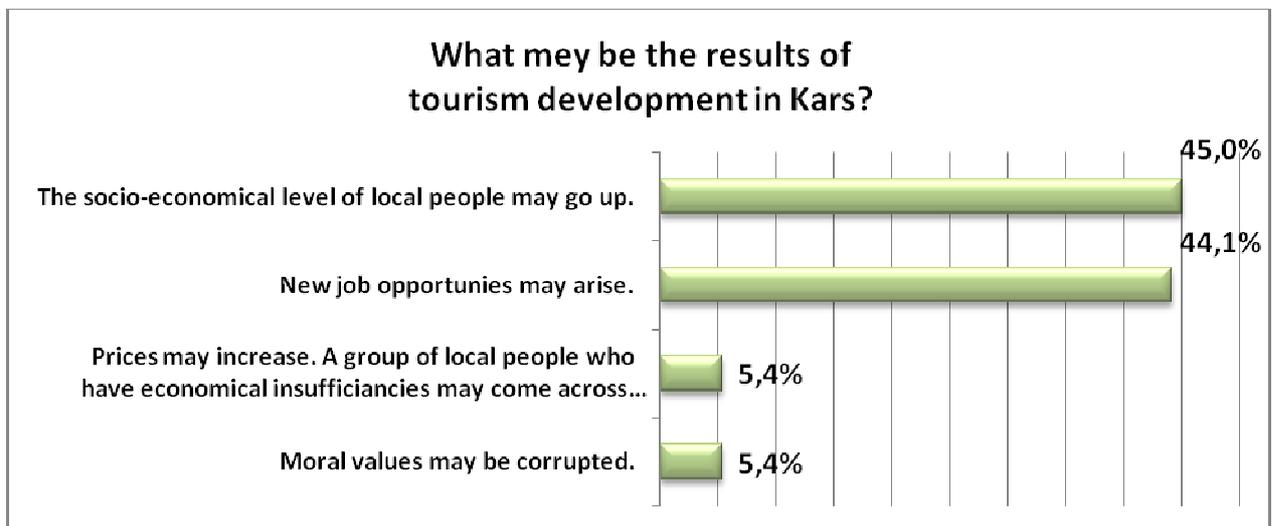


Figure-11

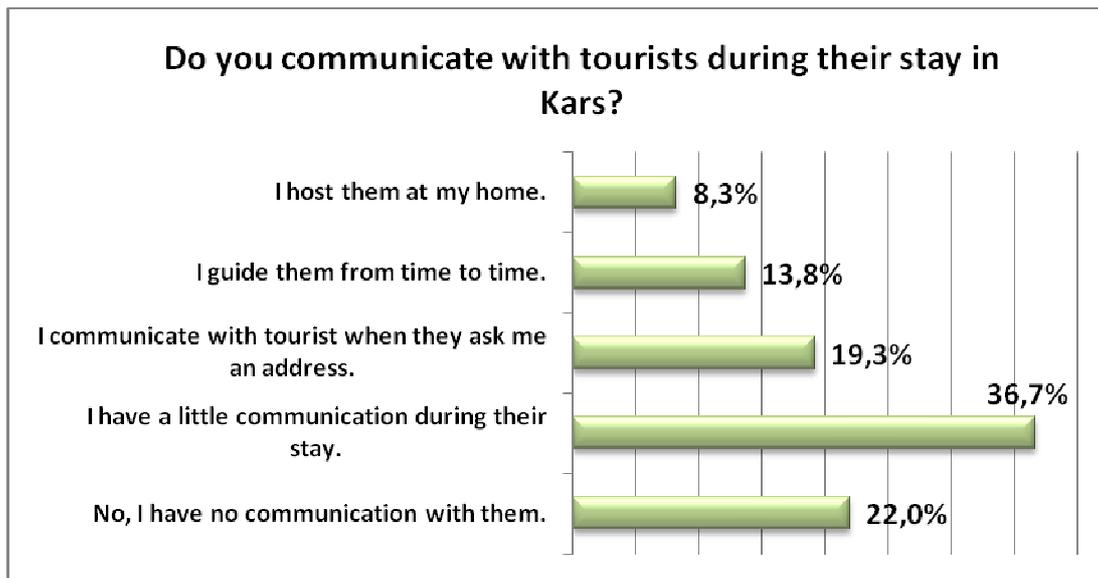


Figure-12

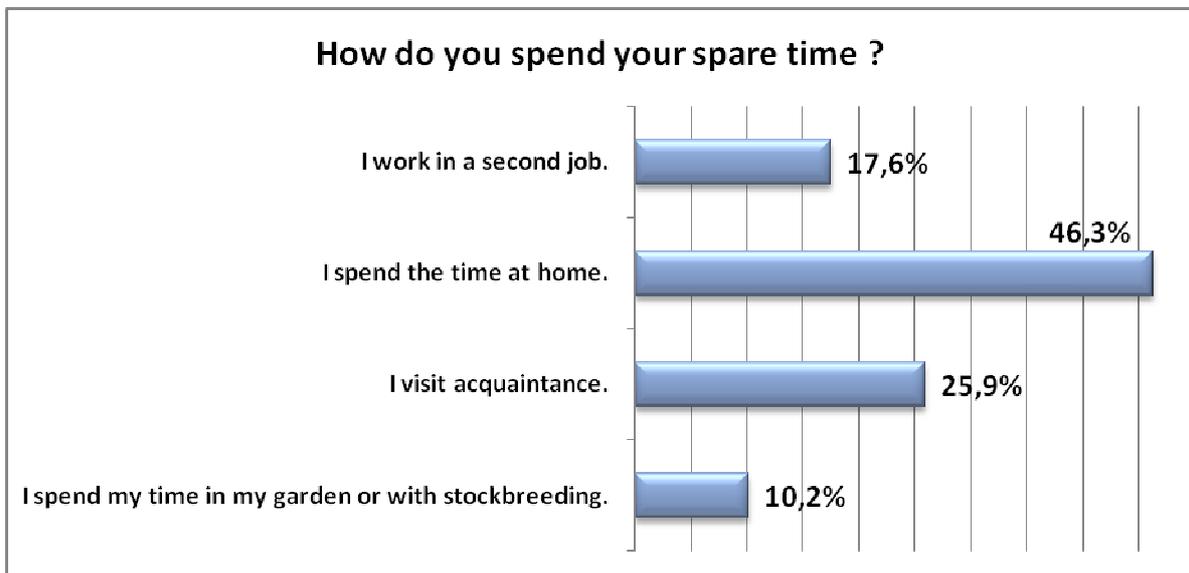


Figure-13

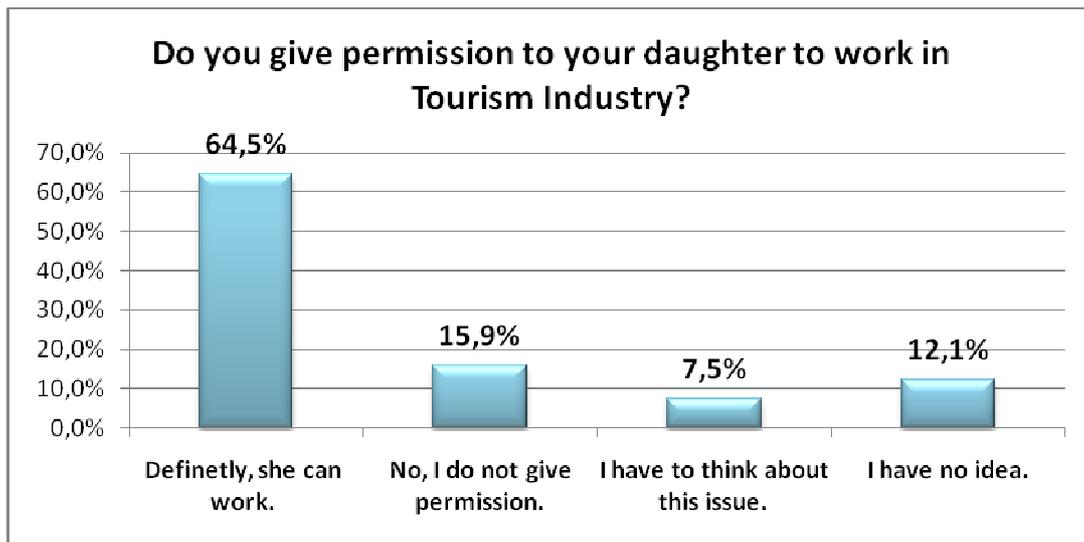


Figure-14



Figure-15

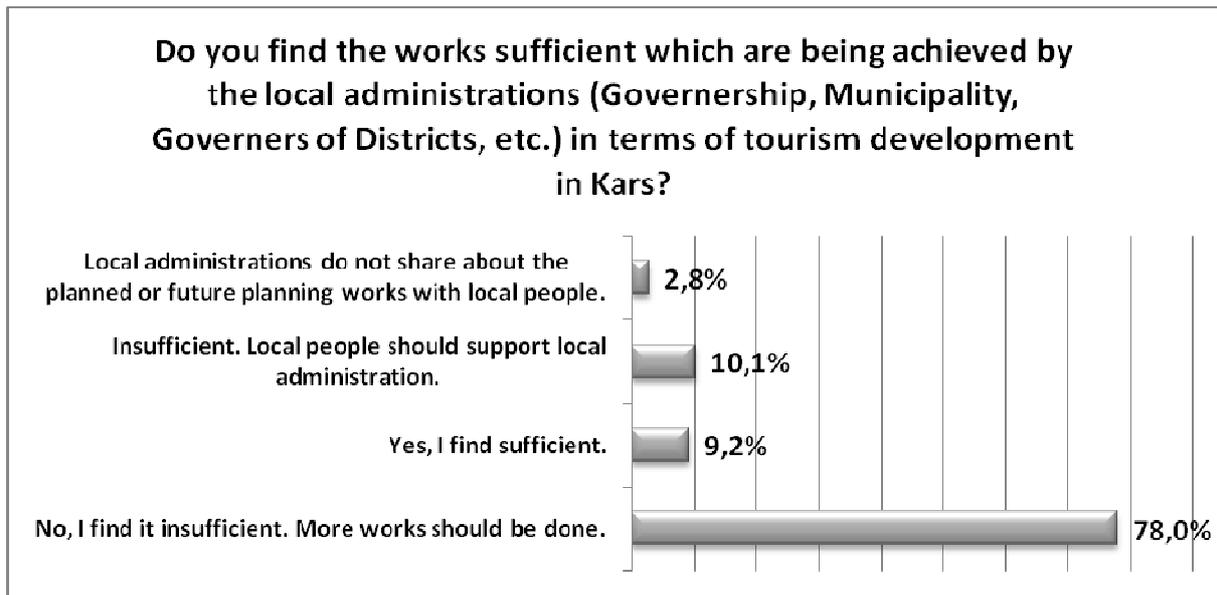
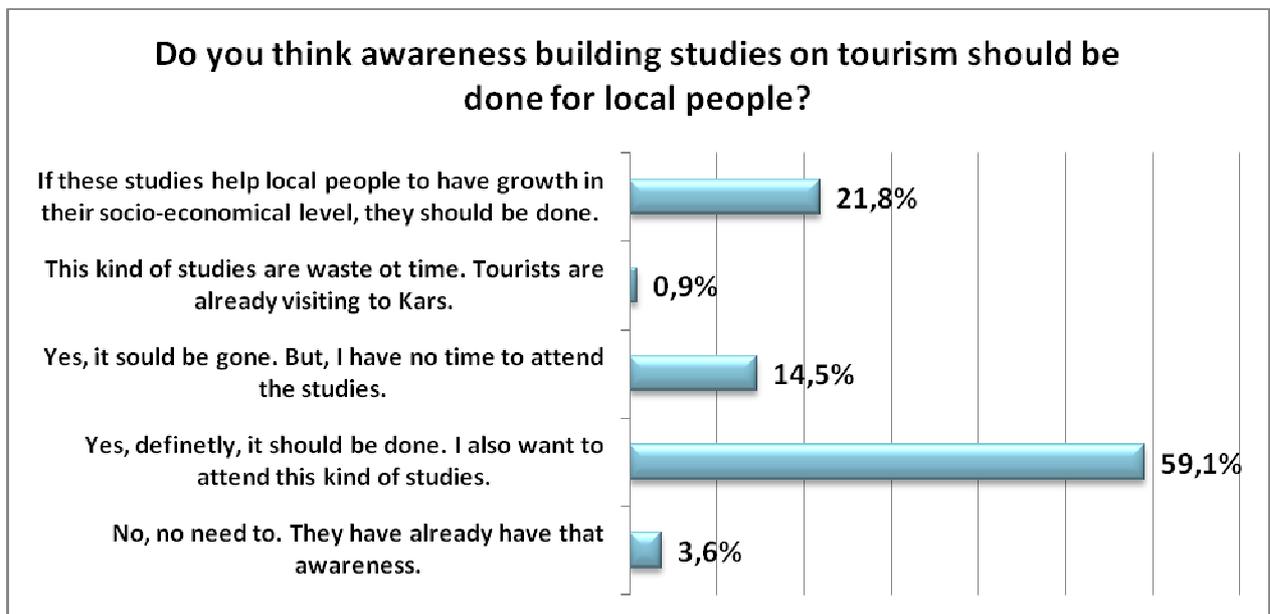


Figure-16



VI – GAPS NEED ANALYSIS ACCORDING TO SECTORAL – OCCUPATIONAL MATRIX

Sectoral – Occupational Matrix of Tourism in Kars

Sectors	High Level	Middle Level	Low Level	TOTAL
Accommodation	16	20	222	258
Food and Beverage	13	5	47	65
Travel Agencies ²	5	5	5	15
Transportation Companies ²	7	7	70	84
Local Administration	19	57	340	416
Guiding	-----	-----	-----	-----
Handicrafts	-----	-----	-----	-----

Notes on the matrix

Guiding and handicrafts services are currently not available in Kars

The local administration includes the municipality, representatives from the central government and the neighbourhood and village representatives of local people. There is no documentation in the local administration regarding human resources, including number of employees. The information was obtained by the researchers orally.

The number of people specifically responsible for tourism activities in Kars within the local administration is not well defined. Those that are responsible for tourism also have other responsibilities.

² These are estimated numbers based on the fieldwork

Achievements: Sectoral – Occupational Matrix of Tourism in Kars

Sectors	High Level	Middle Level	Low Level
Accommodation	-Low level knowledge of Front-office, Housekeeping operations and Food and Beverage Production.	-Low level knowledge of Front-office, Housekeeping operations and Food and Beverage Production. -A small number of employees are graduates of tourism vocational schools. -A small number of employees speak basic English	-Primary education
Food and Beverage	-Low level knowledge of Food and Beverage Service and Interpersonal Communication.	-Most restaurants are run by their owners and do not have middle management	-Primary education.
Travel Agencies	-No tourism and management related education.	-No tourism related education.	-Primary education
Transportation Companies	-No tourism and management related education.	-No tourism related education	-Primary education
Local Administration	-No tourism and management related education.	-No tourism related education	-Primary education
Guiding	-----	-----	-----
Handicrafts	-----	-----	-----

Needs: Sectoral – Occupational Matrix of Tourism in Kars

Sectors	High Level	Middle Level	Low Level
Accommodation	-Managerial and Operational skills -Vocational English	-Managerial and Operational skills -Vocational English	-Operational skills -Vocational English
Food and Beverage	-Managerial and Operational skills -Vocational English	For larger establishments where middle management is appropriate: -Managerial and Operational skills -Vocational English	-Operational skills -Vocational English
Travel Agencies	-Managerial and Operational skills -Historic value of Kars -Vocational English	-Managerial and Operational skills -Historic value of Kars -Vocational English	-Operational skills -Historic value of Kars -Vocational English
Transportation Companies	-Managerial and Operational skills -General tourism -Vocational English	-Managerial and Operational skills -General tourism -Vocational English	-Operational skills -General tourism -Vocational English
Local Administration	-Managerial skills -Vocational English -General tourism -Historic and touristic value of Kars	-Managerial and Operational skills -General tourism -Historic and touristic value of Kars -Vocational English	-Operational skills -General tourism -Historic and touristic value of Kars -Vocational English
Guiding	Currently, there is no guiding body in Kars. Once established all guides require the following trainings: -General tourism -Historic and touristic value of Kars -Interpersonal communication		
Handicrafts	Currently, there are no handicraft businesses. Once established, training should be aimed at generating authentic handicraft production.		
Local community	-General tourism -Historic and touristic value of Kars -House pension business		

Gaps: Sectoral – Occupational Matrix of Tourism in Kars

Sectors	High Level	Middle Level	Low Level
Accommodation	<ul style="list-style-type: none"> -Basic managerial competencies -Leadership -Motivation -Emotional intelligence -Change management -Teamwork -Guest relations and Interpersonal communication -All operational skills (i.e. front office, house keeping, f&, etc.) -Vocational English 	<ul style="list-style-type: none"> -Basic managerial competencies -Motivation -Emotional intelligence -Teamwork -Guest relations and interpersonal communication -Management skills related to the specific area of operations (i.e. front office, sales, housekeeping) - Vocational English 	<ul style="list-style-type: none"> -Front office operations -Housekeeping operations -F&B production -Hygiene & sanitation -Guest relations and interpersonal communication -Vocational English
Food and Beverage	<ul style="list-style-type: none"> -Restaurant management -Basic managerial competencies -Vocational English -Interpersonal communication -All operational skills (i.e. f&b production and service, hygiene and sanitation, etc.) 	<p>For larger establishments where middle management is appropriate:</p> <ul style="list-style-type: none"> -Restaurant management -Basic managerial competencies -F&B production -F&B service -Hygiene & sanitation -Interpersonal communication -Vocational English 	<ul style="list-style-type: none"> -F&B production -F&B service -Hygiene & sanitation -Interpersonal communication -Vocational English
Travel Agencies	<ul style="list-style-type: none"> -Basic managerial competencies -Interpersonal communication -Historic value of Kars -All operational skills (i.e. reservation systems, ticketing, etc.) -Vocational English 	<ul style="list-style-type: none"> -Basic managerial competencies -Interpersonal communication -Historic value of Kars -Reservation and ticketing -Vocational English 	<ul style="list-style-type: none"> -Historic value of Kars -Vocational English
Transportation Companies	<ul style="list-style-type: none"> -Basic managerial competencies -Interpersonal communication -General tourism -Safety and security -Vocational English 	<ul style="list-style-type: none"> -Basic managerial competencies -Interpersonal communication -General tourism -Safety and security -Vocational English 	<ul style="list-style-type: none"> -Interpersonal communication -Safety & security -General tourism -Vocational English
Local Administration	<ul style="list-style-type: none"> -General tourism -Historic and touristic value of Kars -Leadership -Teamwork 	<ul style="list-style-type: none"> -General tourism -Historic and touristic value of Kars 	<ul style="list-style-type: none"> -General tourism -Historic and touristic value of Kars
Guiding	<p>There are no established occupational levels in guiding. All guides require the following trainings:</p> <ul style="list-style-type: none"> -General tourism -Historic and touristic value of Kars -Interpersonal communication 		
Handicrafts	<p>. Training should be aimed at generating authentic handicraft production.</p>		
Local community	<ul style="list-style-type: none"> -General tourism -Historic and touristic value of Kars -House pension business 		

Notes on the matrix

The operational skills trainings provided to high level employees also have a “train the trainer” objective.

VII - TRAINING NEEDS FOR THE DEVELOPMENT OF KARS TOURISM

Based on the research conducted in Kars and examination of previously organized trainings, the authors of this report came to the point of recommending various training programs.

An important objective of the training programs should be aimed at increasing the current capacity of the tourism establishments in Kars, as well as establishing a middle level managerial capacity, as this is one of the main lacking areas. This is especially important for the accommodation organizations.

Previous training programs carried out by the joint program on kitchen, housekeeping, and reception need to be built upon with more comprehensive programs as detailed below.

One aspect that should be taken into consideration when designing and implementing these training programs is the high turnover rate of the employees in the sector. Therefore, any comprehensive training activity should be carried out in conjunction with other measures to reduce this turnover rate, through the diversification of the tourism product to increase the demand and reduce the seasonality. Within this perspective, it is important that upper management receives managerial skills training as detailed below.

Another important issue to consider is the timing of the training programs to be scheduled. There needs to be special care taken to ensure that current employees in the sector can attend the programs within their current working schedules. Furthermore, it is important to think about incentives that will help boost attendance to the education programs. For example, a certificate of attendance, together with a training certificate to be obtained upon the successful completion of certain requirements would provide an important incentive for sector employees to attend.

a. Training Programs for Hotels

Operational skill building programs

- *front-office operations*
- *house-keeping operations*
- *food and beverage production*
- *food and beverage service techniques*
- *Hygiene and Sanitation*

Duration: 24 hours each.

Participants: managers and staff working in relevant departments, and members of the local community who wish to work in hotels

Guest relations and interpersonal communication

Duration: 18 hours

Participants: All personnel of the hotel

Vocational English

Duration: 64 hours

Participants: All staff

Management Development

- *Basic managerial competencies*
- *Leadership*
- *Change Management*
- *Motivation*
- *Emotional Intelligence*
- *Teamwork*

Duration: 12 hours each.

Participants: owners and managerial staff of the hotels

b. Training Programs for Restaurants

Operational skill building programs

- *Food and Beverage Production*
- *Food and Beverage Service*
- *Hygiene and Sanitation*
- *Interpersonal Communication*

Duration: 24 hours each.

Participants: owners, managers and staff working in the restaurants, members of the local community who wish to work in restaurants

Vocational English

Duration: 64 hours

Participants: All staff

Restaurant Management

Duration: 24 hours

Participants: owners and managers of restaurants, members of the local community who wish to start a restaurant operation

Basic Managerial Competencies

Duration: 24 hours

Participants: owners and managers of restaurants.

c. Training Programs for Travel Agencies

Operational skill building programs

- *Reservations and ticketing*

Duration: 24 hours.

Participants: owners, managers and staff working in the travel agencies.

Vocational English

Duration: 64 hours

Participants: All staff

General tourism

Duration: 18 hours

Participants: managers and staff working in travel agencies

History and touristic Value of Kars

Duration 18 hours

Participants: all managers and staff working in travel agencies

Basic Managerial Competencies

Duration: 24 hours

Participants: owners and managers of travel agencies.

d. Training Programs for Transportation Companies

- *Interpersonal relations and communication*
- *Safety and Security*
- *General Tourism*

Duration: 24 hours each

Participants: Owners, managers and other staff including drivers, service attendants, ticket sales staff.

Basic Managerial Competencies

Duration: 24 hours

Participants: owners and managers of transportation companies.

Vocational English

Duration: 32 hours

Participants: Drivers, service attendants, ticket sales staff

e. Training Programs for the Local Administration

General tourism

Duration: 18 hours

Participants: local administration officials

History and touristic Value of Kars

Duration 18 hours

Participants: local administration officials

Managerial development

- *Leadership*
- *Teamwork*

Duration: 12 hours each.

Participants: Upper local administration officials

f. Training Programs for Other Stakeholders of the Tourism Industry

General tourism

Duration: 18 hours

Participants: museum staff, guards of historical sites, NGOs, taxi drivers, employees of hotels and restaurants, local community

History and touristic Value of Kars

Duration 18 hours

Participants: museum staff, guards of historical sites, NGOs, taxi drivers, employees of hotels and restaurants, local community

House Pension Business

These education programs about the house pension business could complement with more specific training the awareness raising seminars for house pension that have already been carried out by the joint program in 5 different villages.

Duration: 30 hours

Participants: Local community members from the city and villages (in Ocak, Kuyucuk, Boğatepe, Taşbaşı, etc. villages)

Handcraft and Souvenir production

Duration: continuously

Participants: Female members of the local community, physically disable citizens.

This training could be coordinated with the existing NGOs that deal with women's issues and disabled citizens.

VII – AVAILABILITY OF TRAINING MATERIALS

The Ministry of Culture and Tourism has been using a series of training materials, including topics such as housekeeping, food and beverage service, food and beverage preparation and front office. However, these training materials are outdated (from 1993) and not very adequate for the current trainings.

The training courses that have been carried out so far by the joint program in Kars have used the specific knowledge and experience of the trainers, who did not benefit from the above mentioned materials. Each trainer developed and used his/her own specific training materials.

In other projects in which Boğaziçi University has been participating, a certain amount of current training material is available. However, this material has been prepared by the individual trainers and is currently the property of these trainers.

Although there seems to be a need for comprehensive and current training material that can be used by the Ministry of Culture and Tourism for subsequent training exercises, the preparation of such material would definitely lengthen the implementation of the training and education courses. Another issue is that the material needs to be adapted to the specific circumstances of the place where the training will be implemented.

VII – CONCLUSION

The aim of this report is to provide a picture of the current situation of the tourism industry in Kars, and to evaluate the need for training at different levels. Although time constraints have prevented a more detailed analysis, the researchers believe that the current research provides an accurate and adequate picture to reflect the situation of the tourism industry in Kars.

The analysis has determined the low level of education of those employed in the sector, including the accommodation and the food and beverage establishments. The lack of vocational tourism training of the staff, and the lack of managerial skills of the managers and owners of the establishments represent some points that need to receive attention, before Kars can be developed as a tourism destination.

In particular, the lack of middle management in the accommodation and food and beverage establishments is worth attention, so that a certain effort in capacity building should be aimed in this direction.

Furthermore, the insufficient number of local inhabitants and current tourism employees who have a sufficient level of English knowledge is also an area that requires attention. This point should also be considered when creating a tourism information centre, as planned by the joint program.

Some training and education programs have been proposed within the scope of this program, taking into consideration the immediate needs. Furthermore, incentives for attendees should be developed to ensure adequate participation and motivation of the trainees. Attention should also be provided to the timing of the courses and their promotion and communication to potential participants.