

- **Ayubowan** -
“May You Live Longer”



Theme: Training of Human Resources and Capacity Development in Tourism

Topic: A Public-Private-People Partnership (PPPP) Model for Human Resource Development for Tourism and Hospitality Industry – A Case Study of Sri Lanka

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Tehran, Islamic Republic of Iran**

Dr. D.A.C. Silva

*Director of the Center for Economic Research and Industry Policy Analysis (CERIPA) and
Former Director General of Ministry of Economic Development, Sri Lanka Tourism
Senior Lecturer and Coordinator of Tourism Studies, University of Colombo
E mail: drsuranga3@gmail.com*

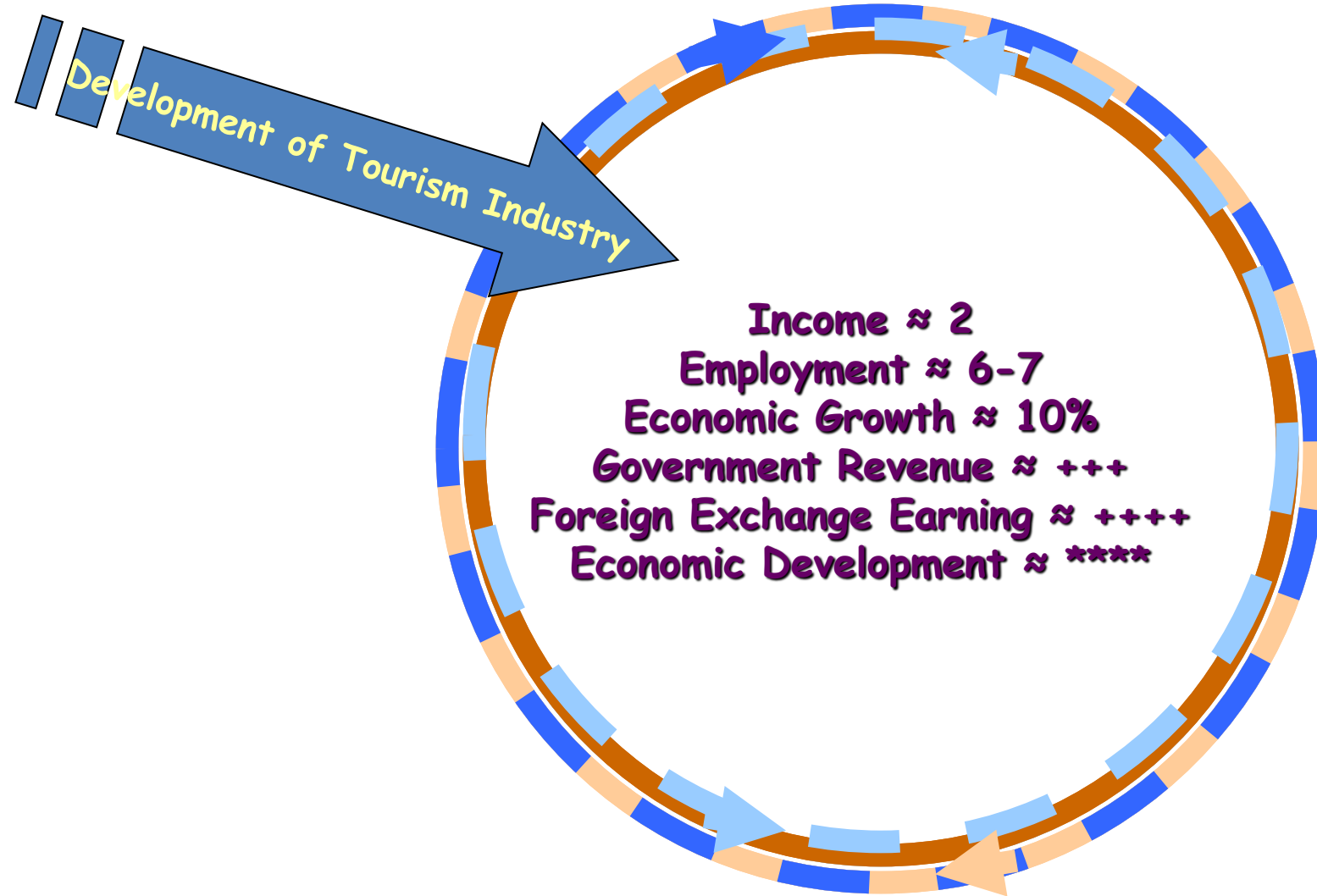
Specific Objectives of this Study

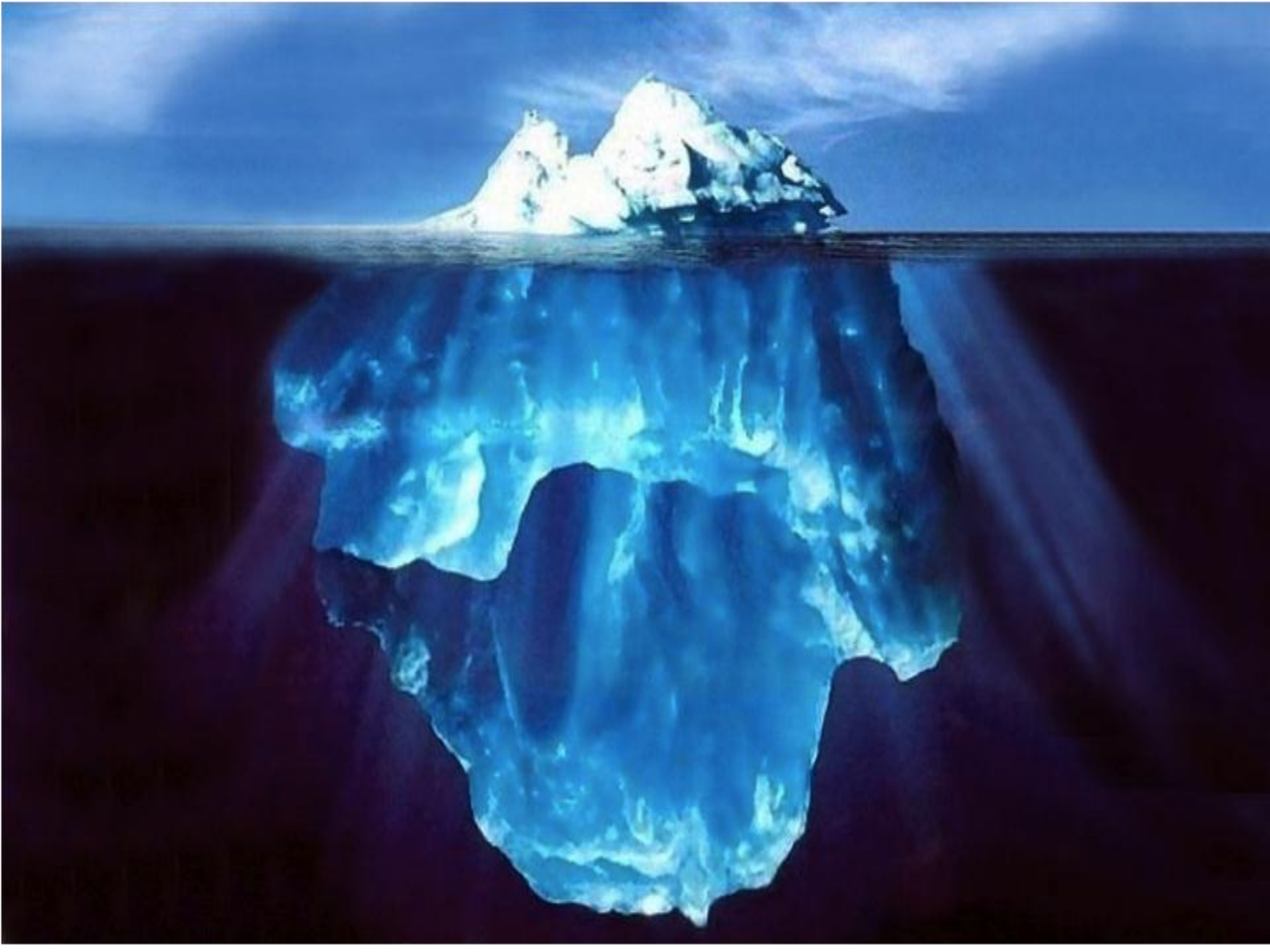
- Examine the major challenges for manpower development for tourism industry in Sri Lanka
- Explore the possible contribution of Public, Private and People Partnership (PPPP) to provide the required manpower for tourism industry in Sri Lanka

Methodology

- Data Collected from:
 - Secondary Source
 - Annual reports and other publications
 - Primary Sources
 - Questionnaire and discussion:
 - Community members
 - Key informants
 - Training institutes

The Direct, Indirect and Induced Effects



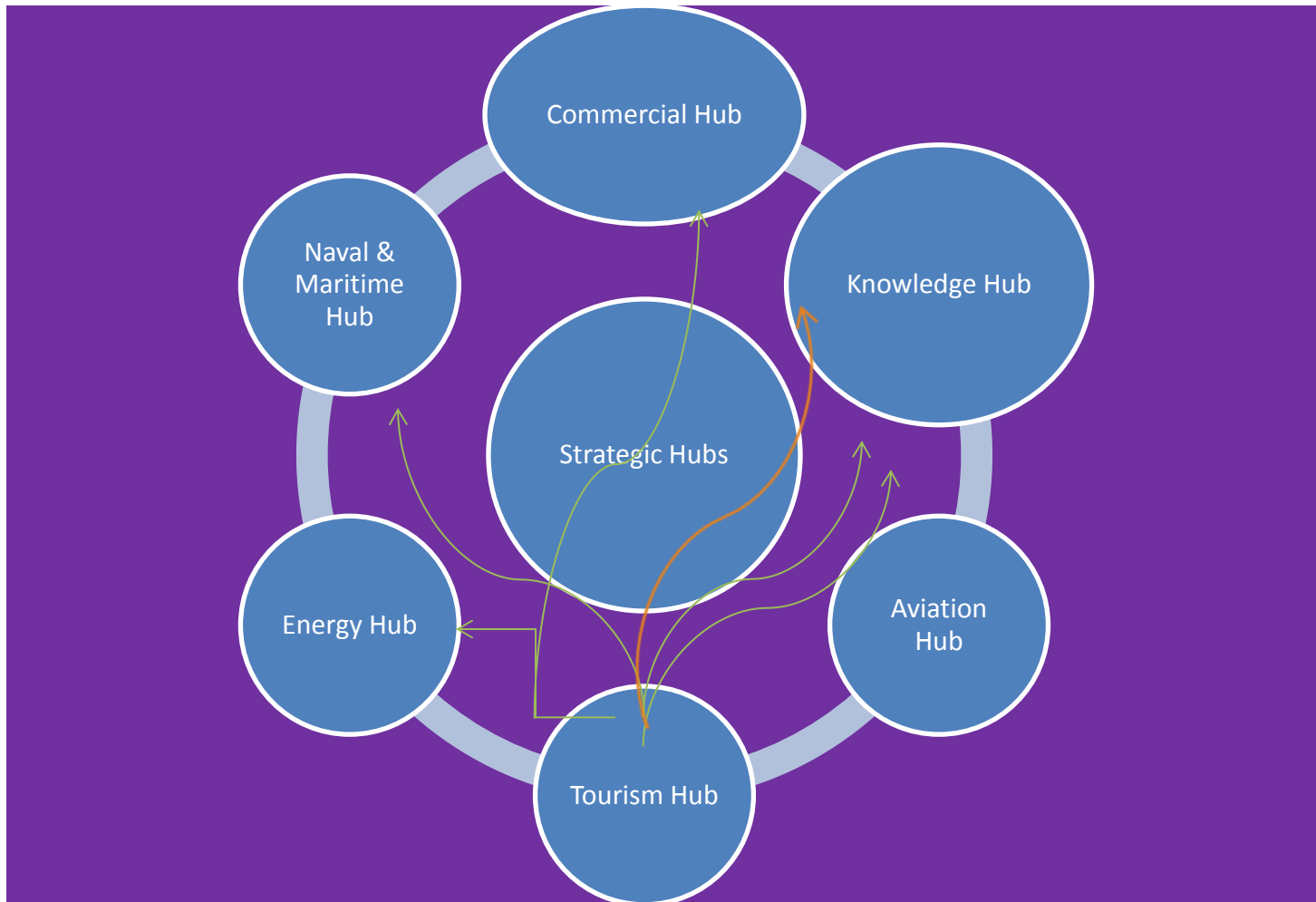


Great Expectations and High Vulnerability

More Than Ever Before

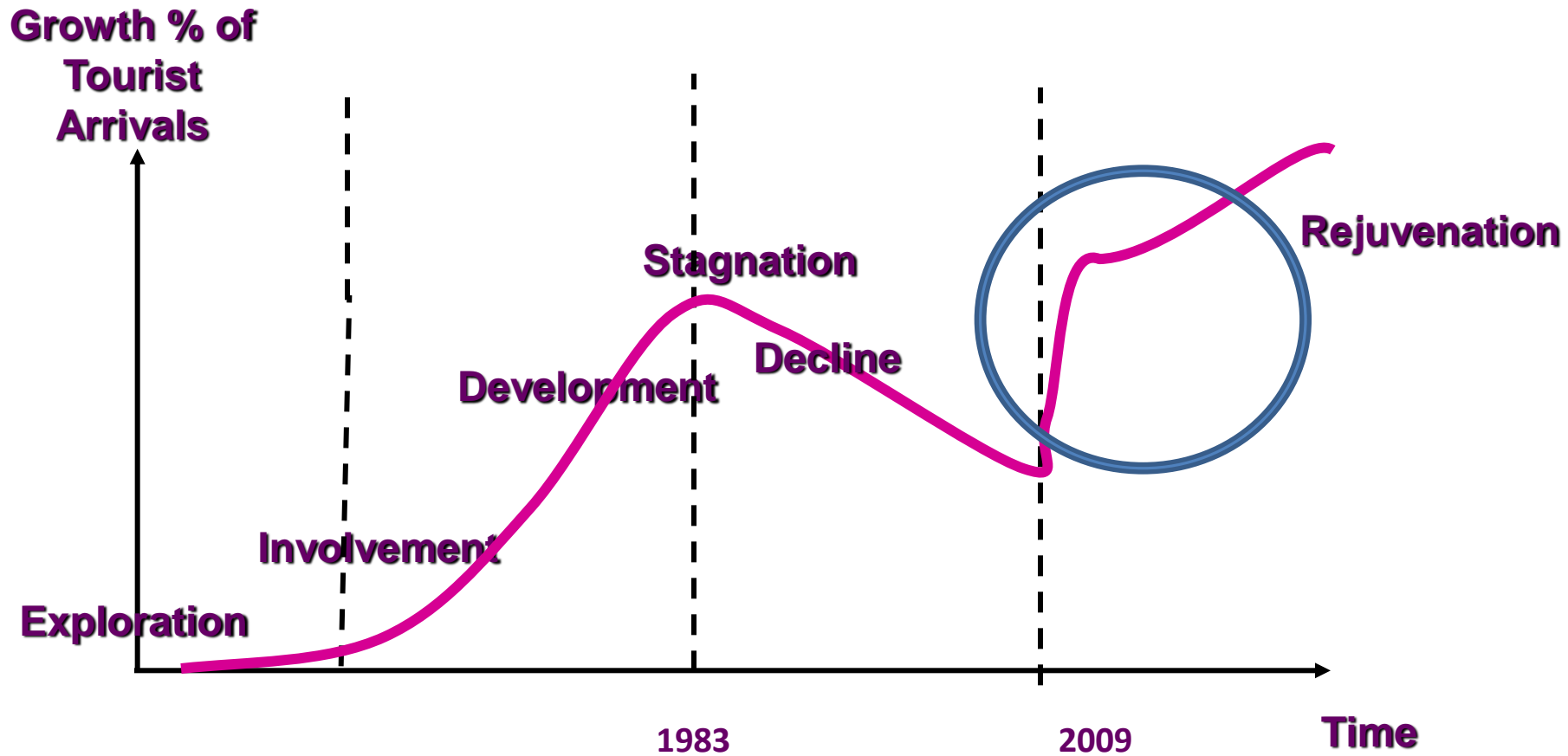


Five to Six Hubs

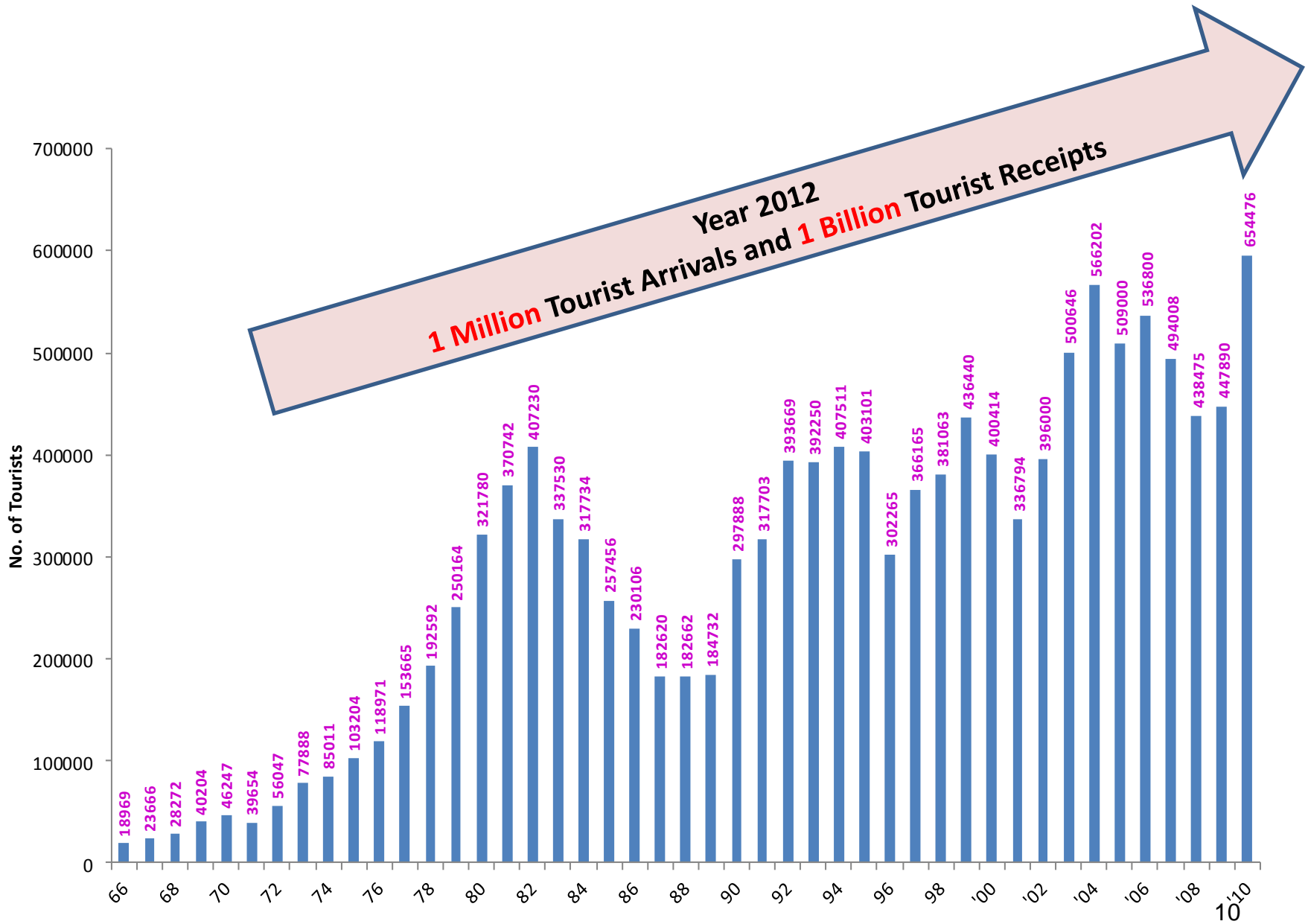


**US\$ 4,000+ per capita income and a US\$ 100 billion
Mahinda Chintana –Vision for the Future**

Sri Lanka Tourism Growth Life Cycle



Peace and Sri Lanka Tourism Development



Recent Achievements of Sri Lanka Tourism

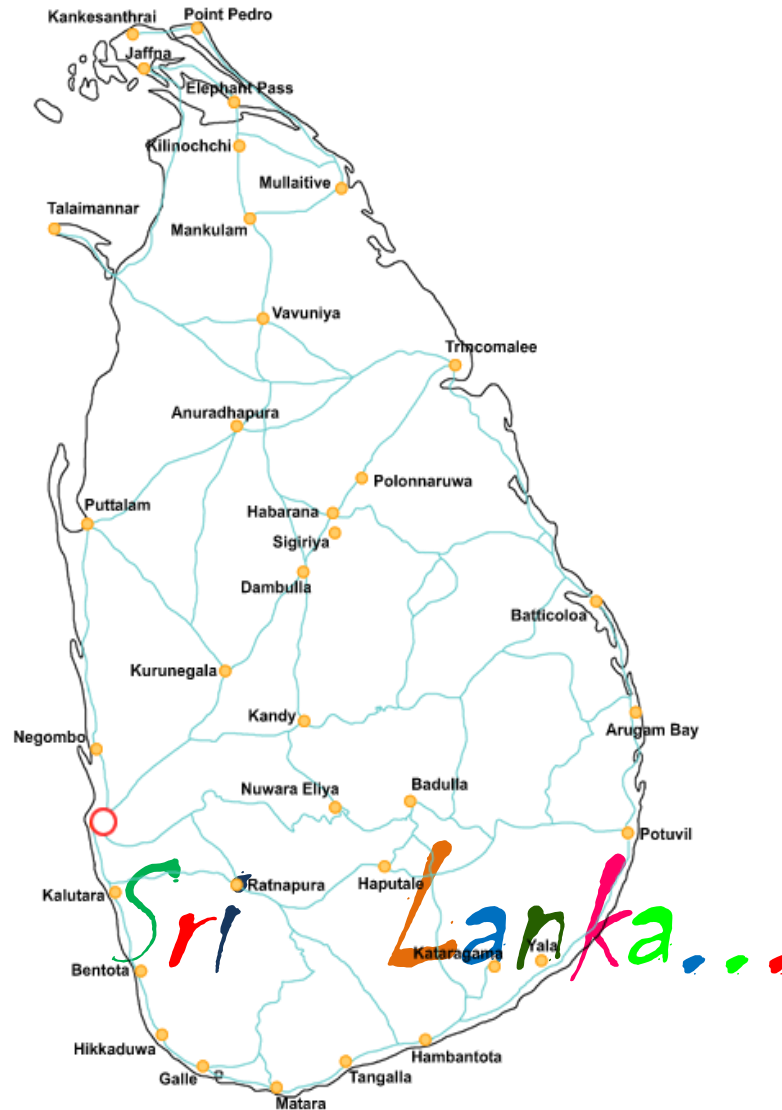
One Million Tourist Arrivals and USD One Billion Tourism Receipts

1 Hundred US\$ Per Capita Daily Spending (Per Tourist Per Day)

Our Destination

*On leaving
the Island of
Andoman and
sailing a thousand
miles,
a little south of west,
the traveler reaches
Ceylon,
which is undoubtedly
the finest Island of its
size in the entire
world*

- Marco Polo -



A Case Study of Sri Lanka: “So Much in So Little”

- **Uniqueness,**
- ***Diversity,***
- ***Compactness,***
- ***Authenticity***
- ***Friendliness***

World’s Most Renowned and Largest Travel Guide Book and Digital Media Publisher – “The Lonely Planet”

<http://www.lonelyplanet.com/sri-lanka>

Sri Lanka among world’s best six Tourist destinations – National Geographic :

<http://med.gov.lk/english/?p=9130#sthash.GkFjTANH.dpuf>

Key Focused Areas in Sri Lanka Tourism Development

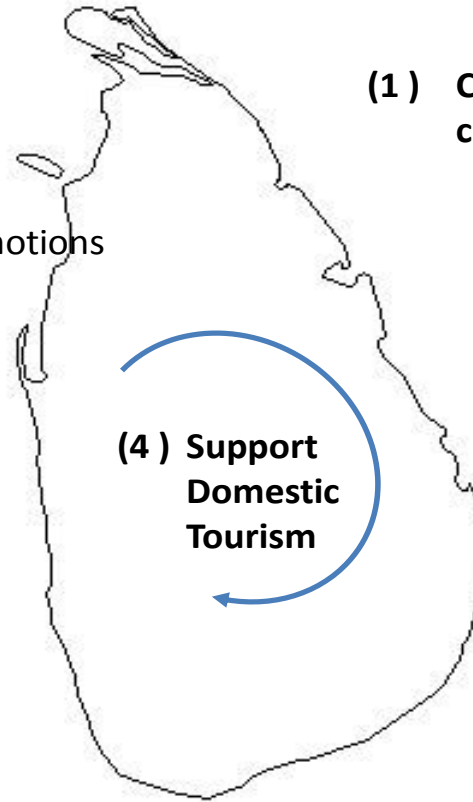
THE GOALS AND WAYS TO REALIZE THE VISION

(2) Attracting new tourists

- Identifying target markets
- Marketing communications & promotions
- Facilitating the visit

(3) Ensuring that departing tourists are happy

- Superior value chain
- Tourist information
- Public support
- Tourist safety



(1) Creating an environment conducive to tourism promotion

- Policy Framework
- Infrastructure
- Transport
- Attractions & Events
- Service Standards
- Manpower

(5) Creating awareness & positive perceptions globally

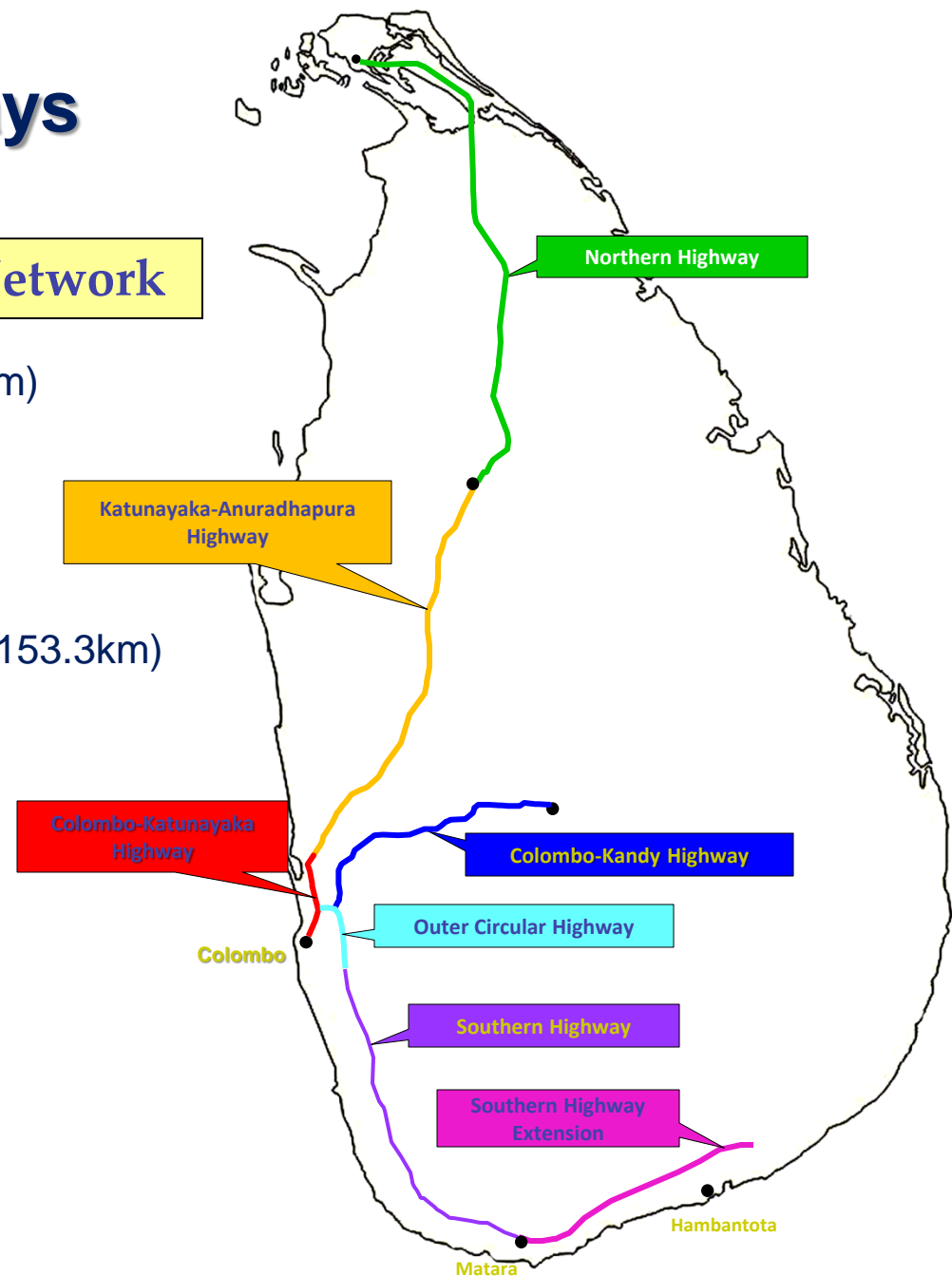
- Involving foreign missions
- Involving Diaspora
- International public relations



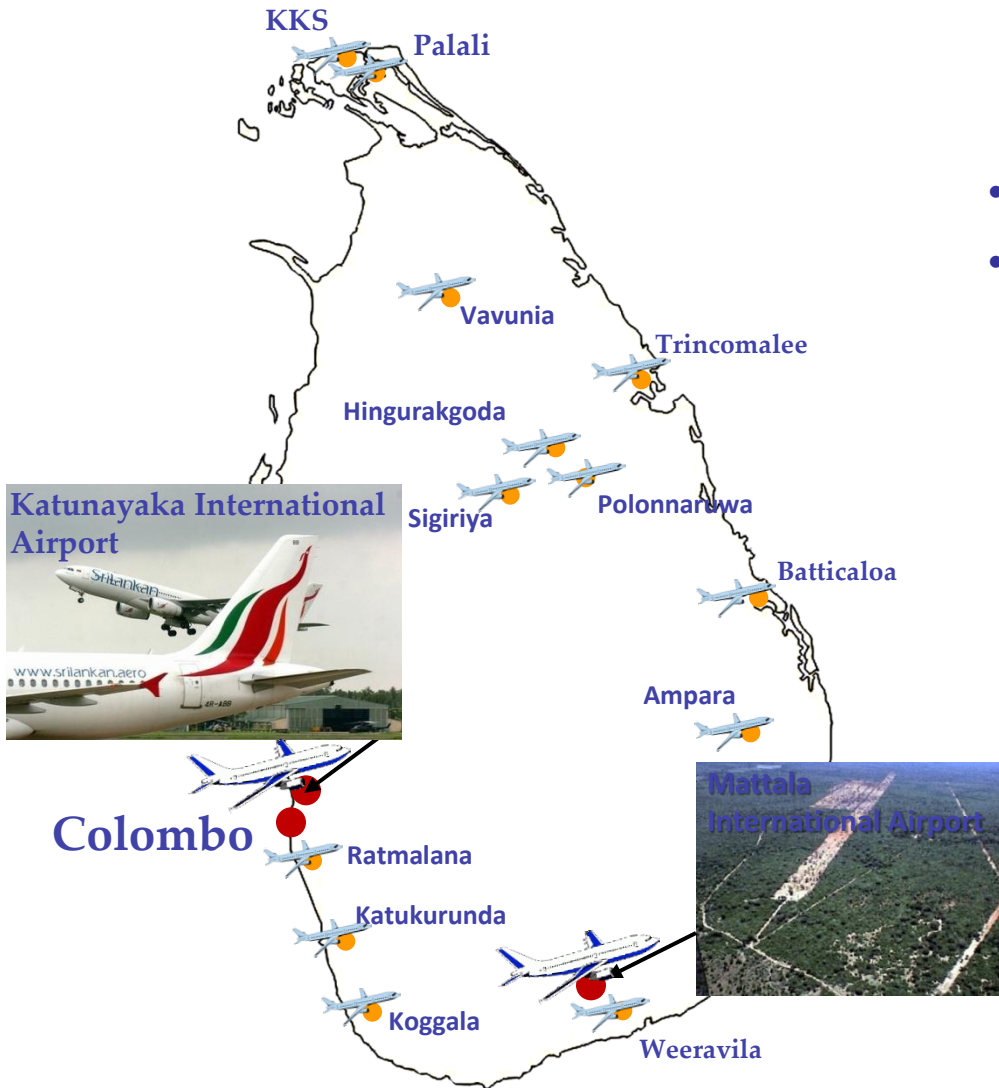
Expressways & Highways

Development of High Mobility Network

- Colombo - Katunayake Expressway (25km)
- Southern Highway (130km)
- Outer Circular Highway (28km)
- Colombo - Kandy Highway (98km)
- Katunayake - Padeniya - Anuradhapura (153.3km)



New Airports of Sri Lanka



Aviation Hub

- Mattala – 2nd international airport
- Modernisation of the Katunayake International Airport



Mattala International Airport

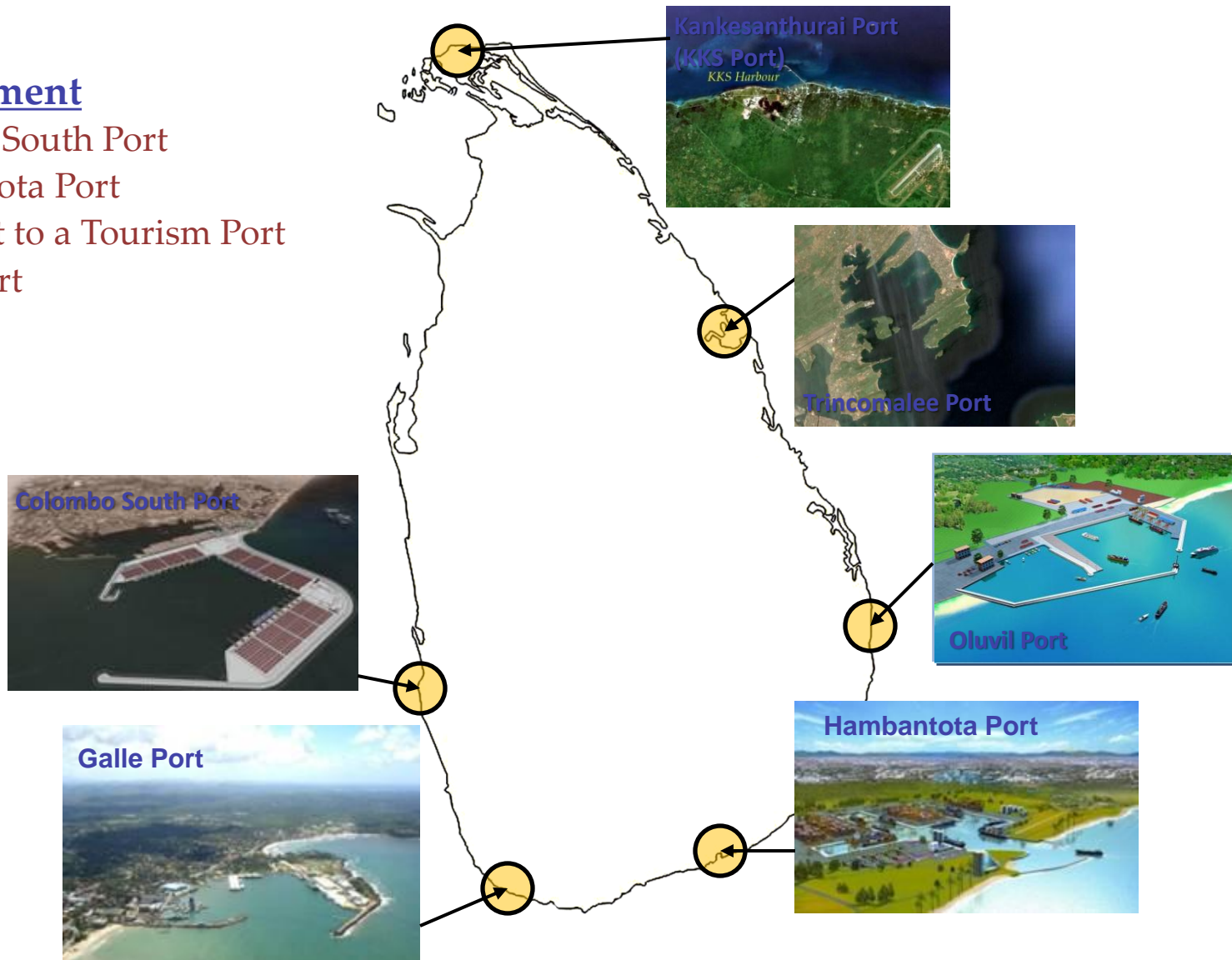


Domestic Airports to be renovated

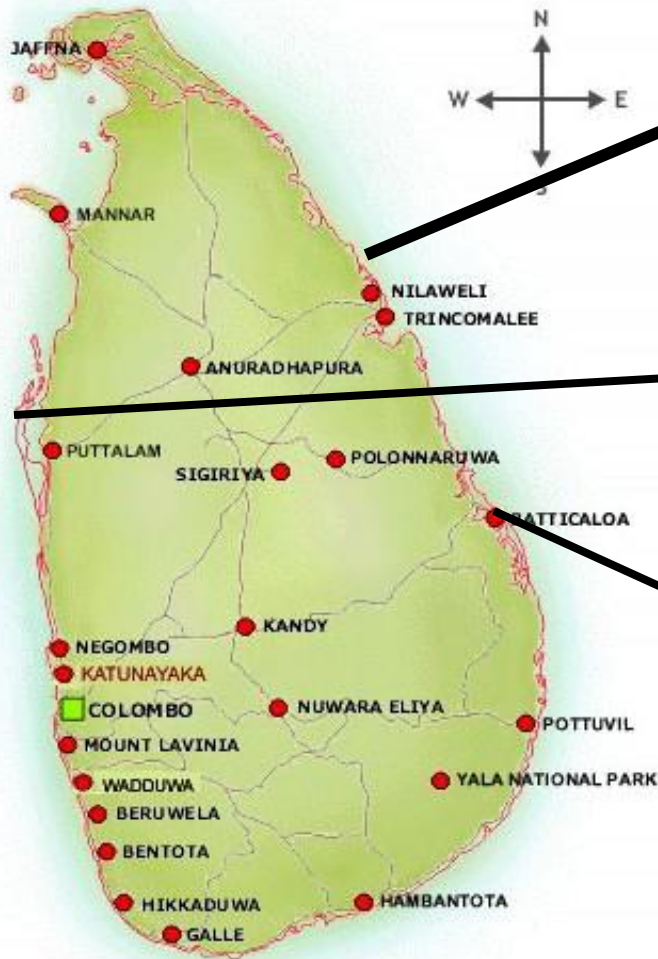
New Ports of Sri Lanka

Ports Development

- Colombo South Port
- Hambantota Port
- Galle Port to a Tourism Port
- Oluvil Port
- KKS Port



Proposed Resorts Development



Kuchchavelli

Kalpitiya

Passekudah

Kalpitiya Dutch Bay Resort



- Total land extent is 4,000 acres.
- It consists of Dutch Bay, Portugal Bay and the most attractive islands namely, Karaiitive, Ippantive, Periyarachchi, Eramative and Sinnerarachchial, Oddakareltivu, Battalanguduwa, Palliyawatta, Vellai, etc.
- The major tourist attractions are beach, coral reefs, whale and dolphin watching, bird watching, wildlife, shipwrecks, etc.

New Resort
Development

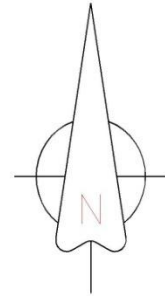
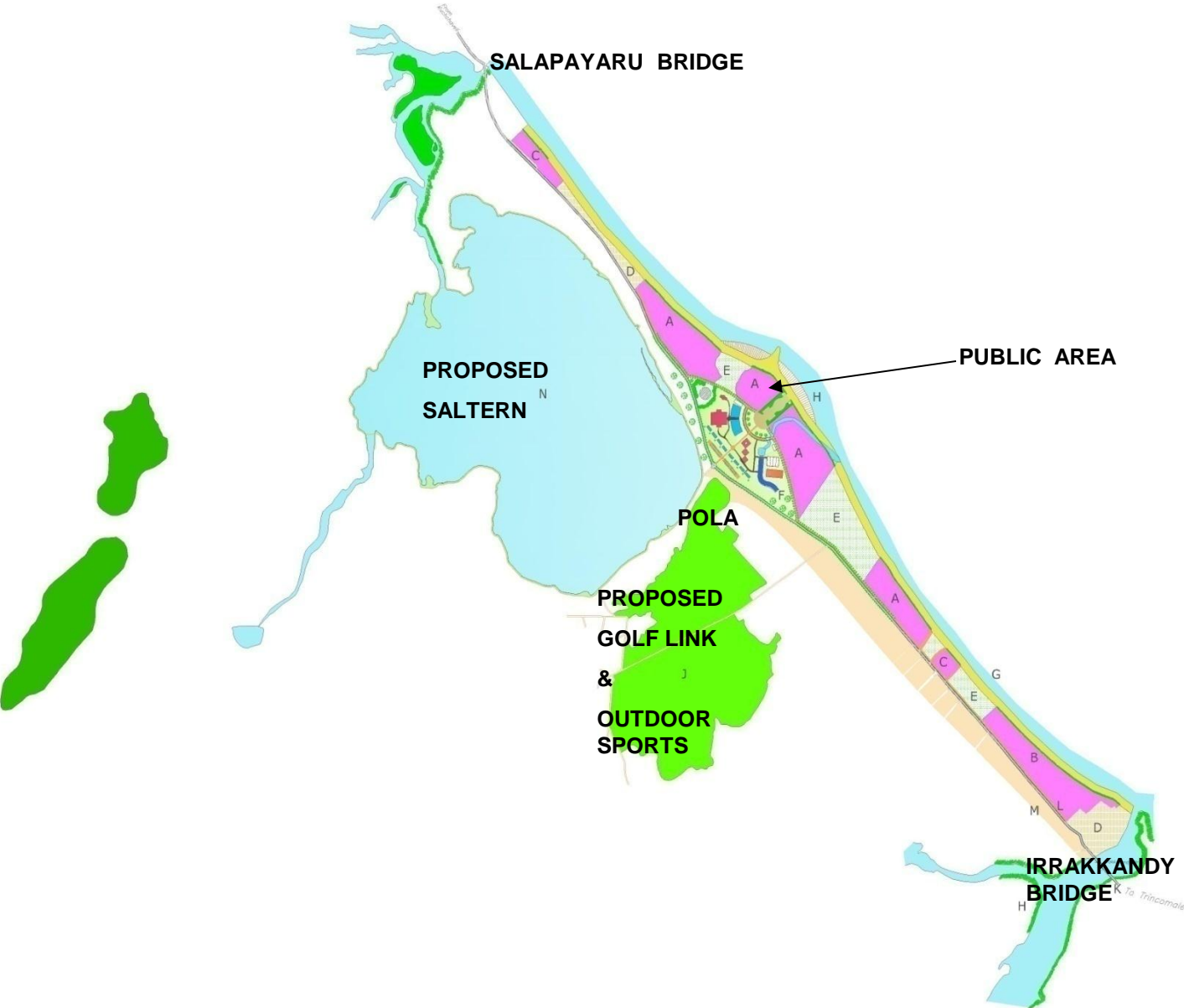
Integrated Resort Development



- An integrated resort expanded over 5,000 acres with beach front in West Coast - Kalpitiya



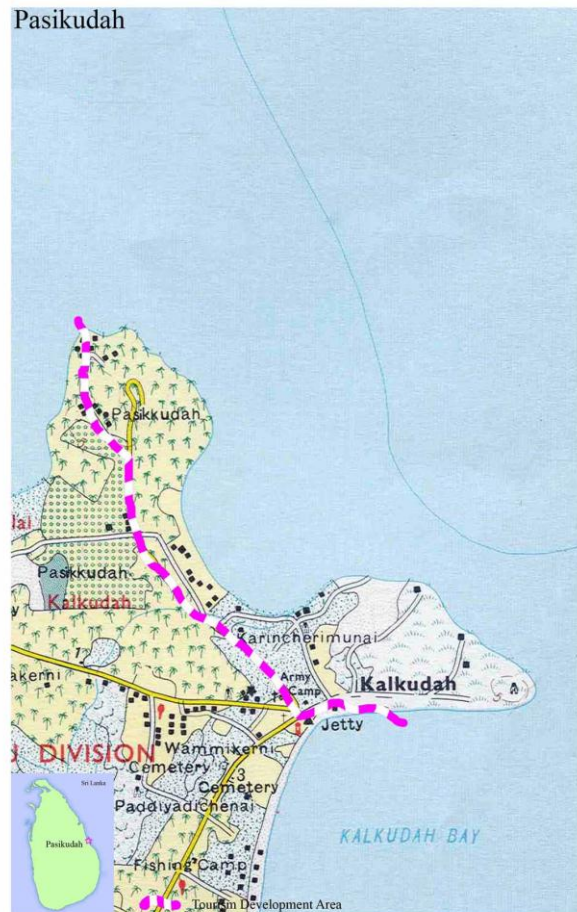
Master Plan for Kuchchaweli Project Area



KEY

- A 4 TO 5 STAR HOTELS (175 Acres)
- B 2 TO 3 STAR HOTELS (70 Acres)
- C OTHER CATEGORY (25 Acres)
- D FISHING
- E BUFFER ZONE
- F PUBLIC AREA (140 Acres)
- G SEA RESERVATION
- H WATER SPORTS ACTIVITIES
- J GOLF GROUND
- K TRINCO - PULMODDAI HIGH WAY
- L INTERNAL PARALLEL ROAD
- M HOME GARDEN
- N PROPOSED SALTERN

Passikudah Resort



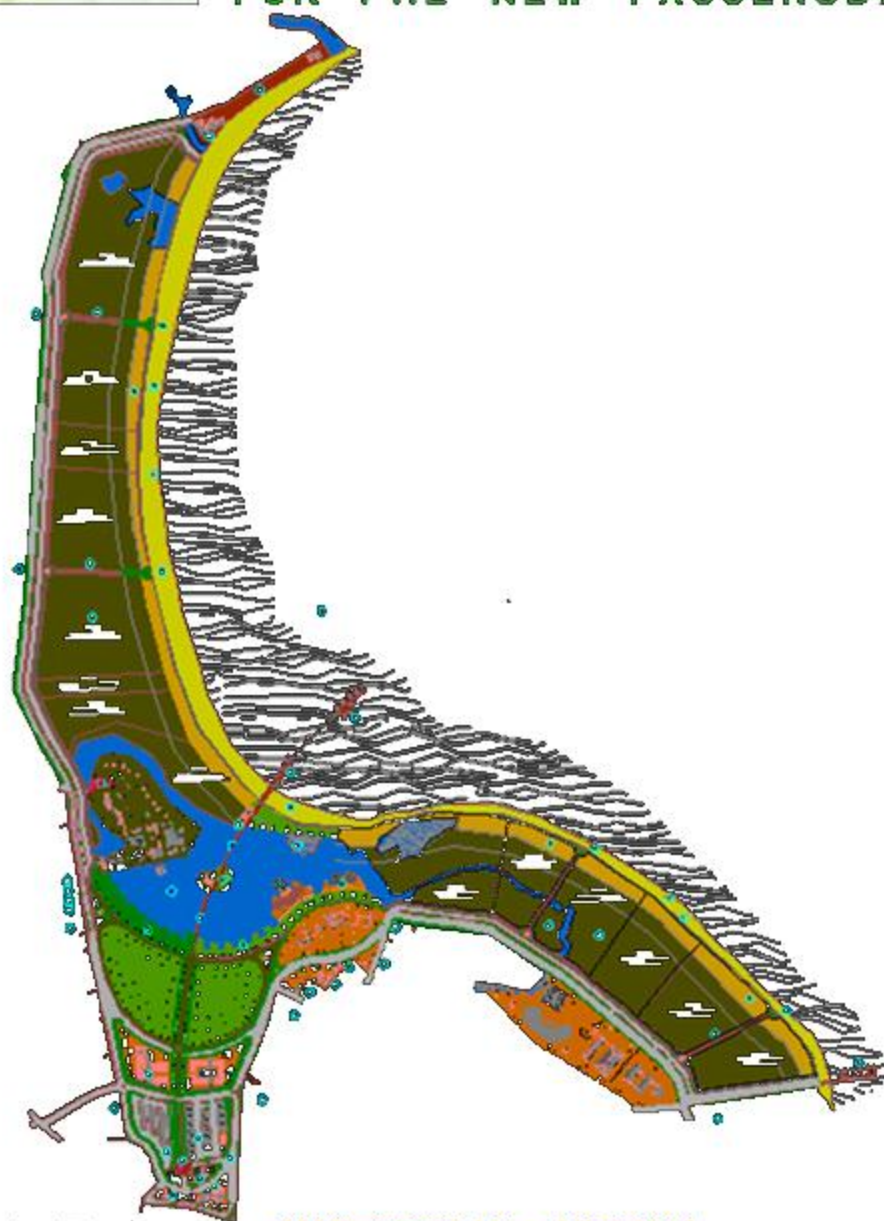
- 13 hotel projects
- Public area development
- To reinstate water supply from Valachcheni
- Infrastructure Development
- To setup changing room and Toilet block under the NECCDEP





CONCEPTUAL MASTER PLAN PROPOSAL

FOR THE NEW PASSEKUDAH TOURIST DEVELOPMENT AREA



MASTER PLAN - OPTION 1

- | | |
|--|--|
| 1.LAKE | 23.HELICOPTER PAD |
| 2.ISLAND | 24.MEDICAL CENTER |
| 3.TIMBER BRIDGE | 25.SEWER TREATMENT PLANT |
| 4.SPILL OVER BASIN | 26.SERVICES (TRANSFORMER/ CBS / COMMUNICATION TOWER / TELECOM) |
| 5.PUBLIC COURT | 27.SPORTS FACILITIES |
| 6.BEACH | 28.HOTEL STAFF QUARTERS |
| 7.EXTENDED / PRIVATE BEACH | 29.LIFE GUARD TOWERS |
| 8.DINGY PIER | 30.HOTELS |
| 9.TSUNAMI MEMORIAL TOWER | 31.CYCLE PATH & GOLF CART ROUTE |
| 10.MAIN PEDESTRIAN ACCESS | 32.PEDESTRIAN PATH |
| 11.OPEN AIR THEATRE | 33.GREEN BELT |
| 12.AQUARIUM | 34.VEHICULAR ROAD |
| 13.ART GALLERY | 35.CHANGING ROOMS |
| 14.PERFORMANCE ART GALLERY | 36.AMBALAMA |
| 15.RESTAURANT & TEA CENTER | 37.ACCESS WAYS TO BEACH |
| 16.SLIDA OFFICE | 38.PONTOON |
| 17.TSUNAMI WARNING CENTER | 39.SEA PLANE JETTY |
| 18.TOURIST POLICE | 40.WATER TANK & SUMP |
| 19.COMMUNICATION FACILITY / TOURIST INFORMATION CENTER | 41.FISHING COMMUNITY |
| 20.SHOPPING BAZAAR | 42.SALES & COMMUNITY GATHERING HALL |
| 21.CAR PARK | 43.SEA |
| 22.BUS PARK | |



CONCEPTUAL MASTER PLAN PROPOSAL FOR THE NEW PASSEKUDAH TOURIST DEVELOPMENT AREA



PERSPECTIVE VIEW

A night view of a modern resort building with a swimming pool and a wooden table with a lantern in the foreground. The building is illuminated from within, and the pool reflects the lights. The foreground shows a wooden table with a lit lantern and a wooden chair. The background features palm trees and other tropical vegetation.

SRI LANKA. THE WONDER OF ASIA

Investment Opportunities

Room Capacity to be increased by 35,000 within 5 years, opportunities in mega tourism resort development projects , resort hotels, city hotels, boutique hotels, apartment etc.

Other Investment Opportunities

- Domestic airlines
- Convention and exhibition centres
- Recreational Facilities i.e. Theme parks, golf parks, water sports, cable cars, night entertainment etc.
- Restaurants
- Training schools

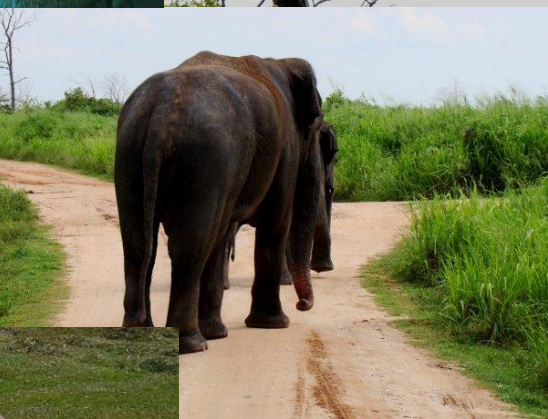
Incentives for Investments



- One of the most peaceful and stable countries in the region
- A potential trading and logistics hub in the region
- Attractive tax holidays, exemptions from duty & For Ex controls
- No restriction on repatriation of earnings
- Safety of foreign investment guaranteed by constitution
- Double taxation avoidance treaty with 37 countries
- Minimum investment of \$ 500,000 to qualify for BOI
- One stop shop for investment processing





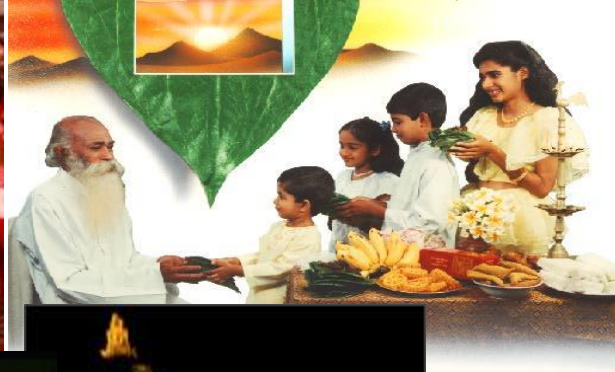






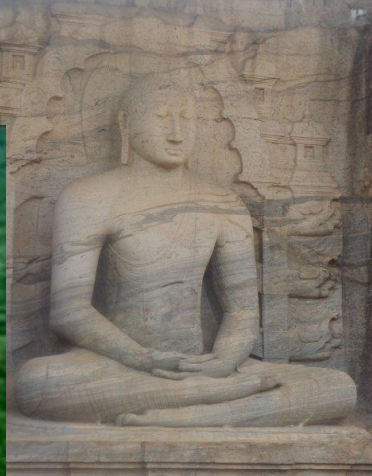
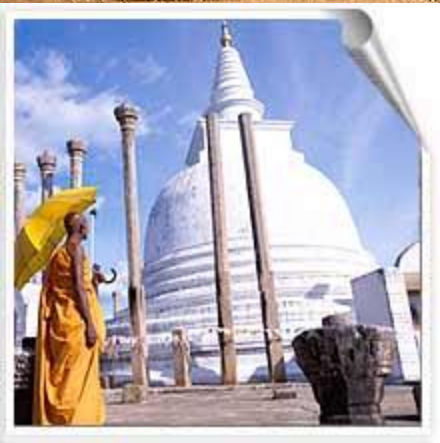
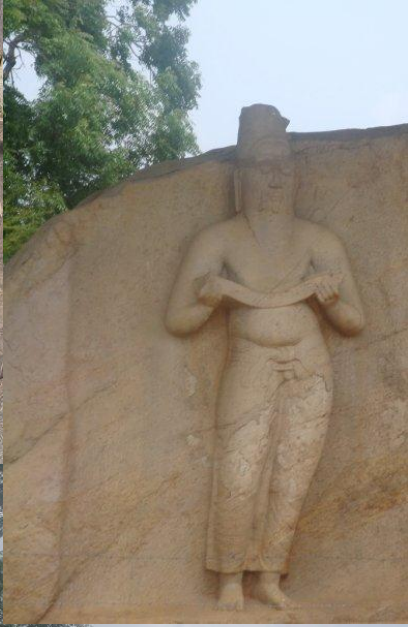
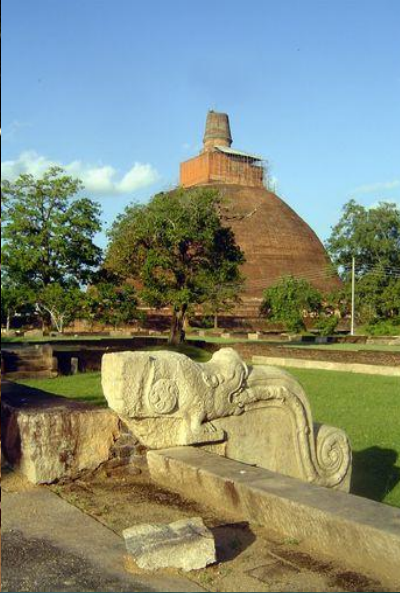
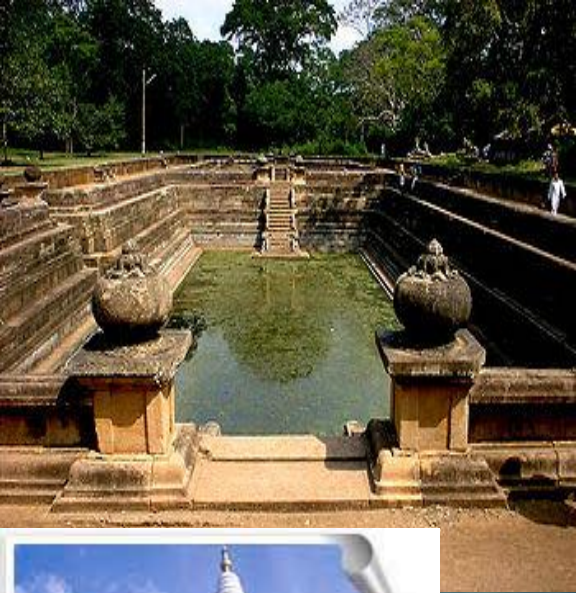


Kataragama Perahera



Traditional dances





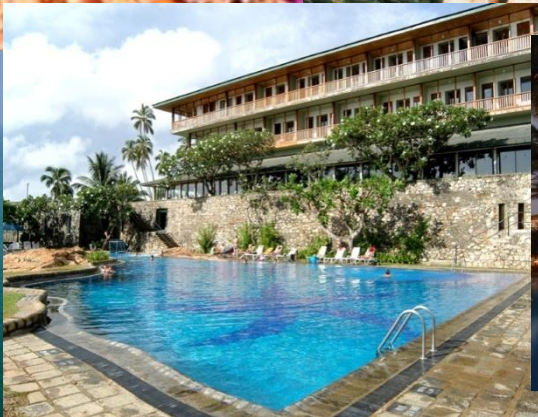


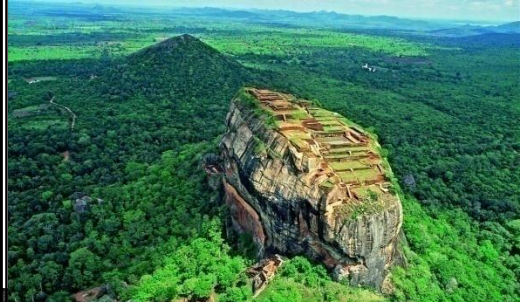


Islam



Buddhism





RECENT TOURISM INFRASTRUCTURE DEVELOPMENT

One Stop Shop Project

Electronic Travel Authorization (ETA) System - Increased tourism revenue

DEVELOP KEY AREAS FOR TOURISM

Northeastern Coast - Kuchchaveli in Trincomalee district

East Coast - Passikudah

Northwestern Coast - Kalpitiya consisting 14 Island

Southwestern Coast - Deeduwa wetland near Maduganga in Benthota

New Hotel Projects

Avani,

Six Senses,

Hyatt

Marriott

Mövenpick

Starwood

Onyx

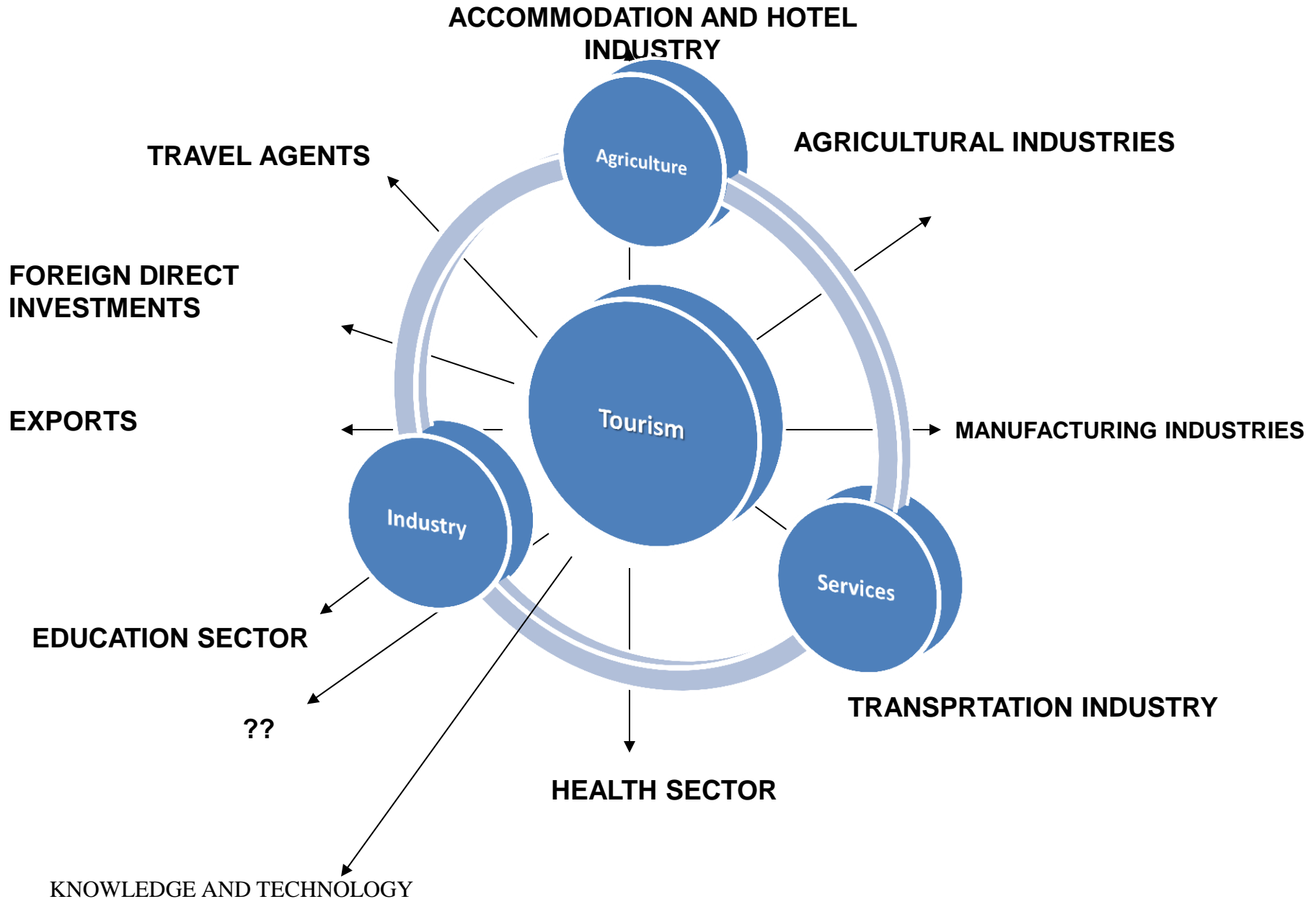
Shangri-La

ITC

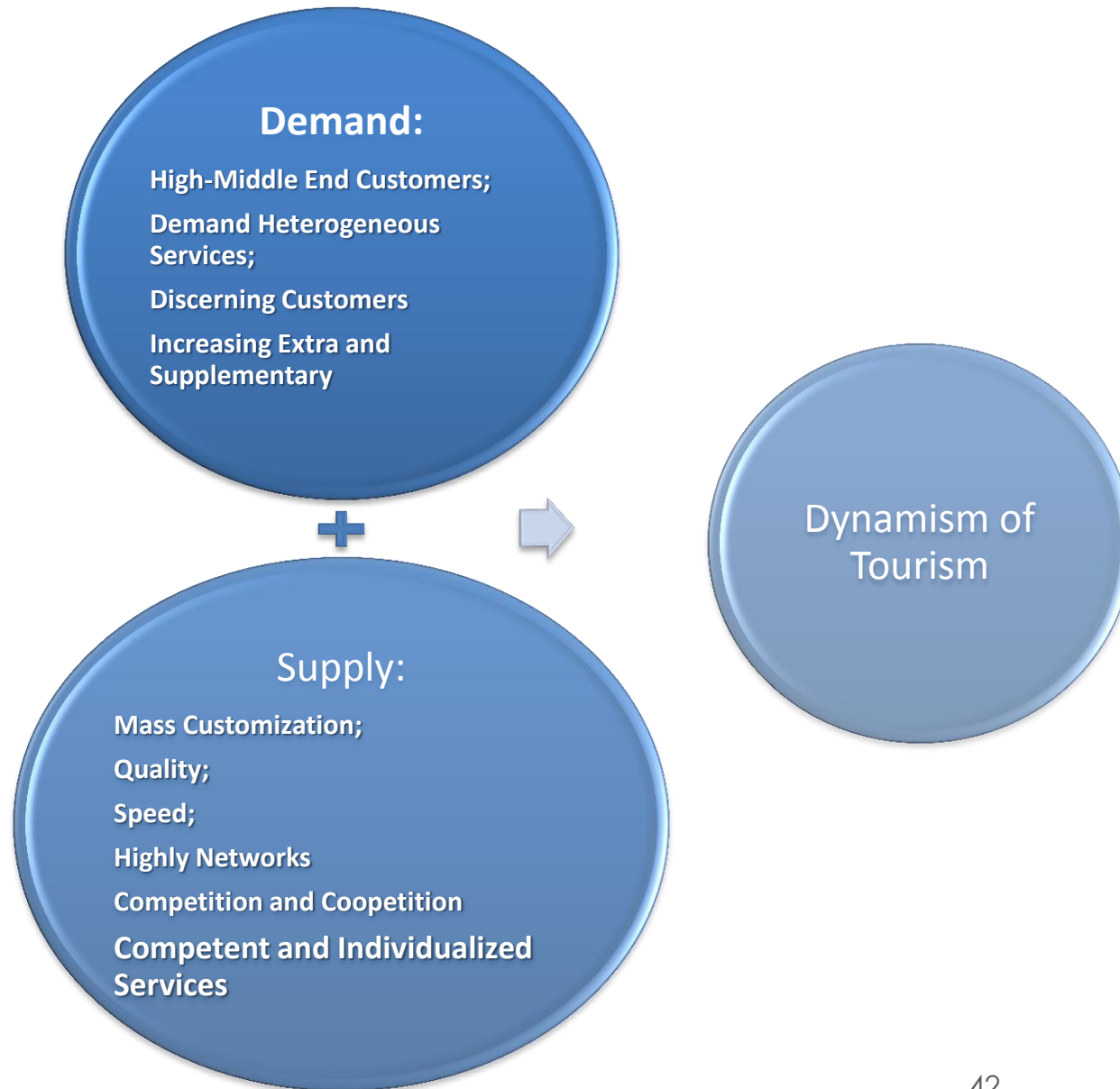
Multi-dimensional, Interconnected and Interdependent Nature of Tourism



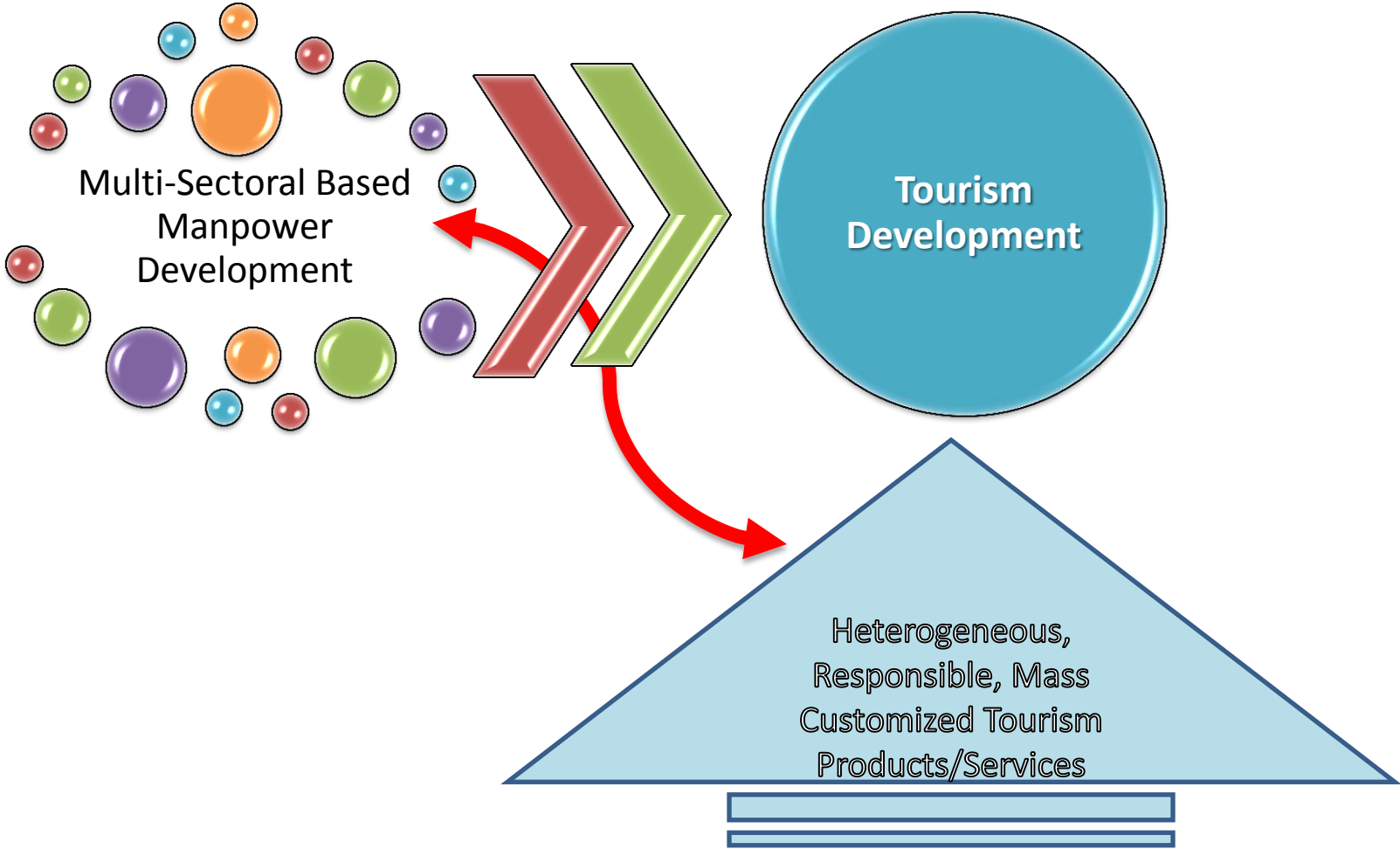
Strong Backward and Forward Leakages



Drive-Forces of Modern Tourism Development



Importance of Manpower Development



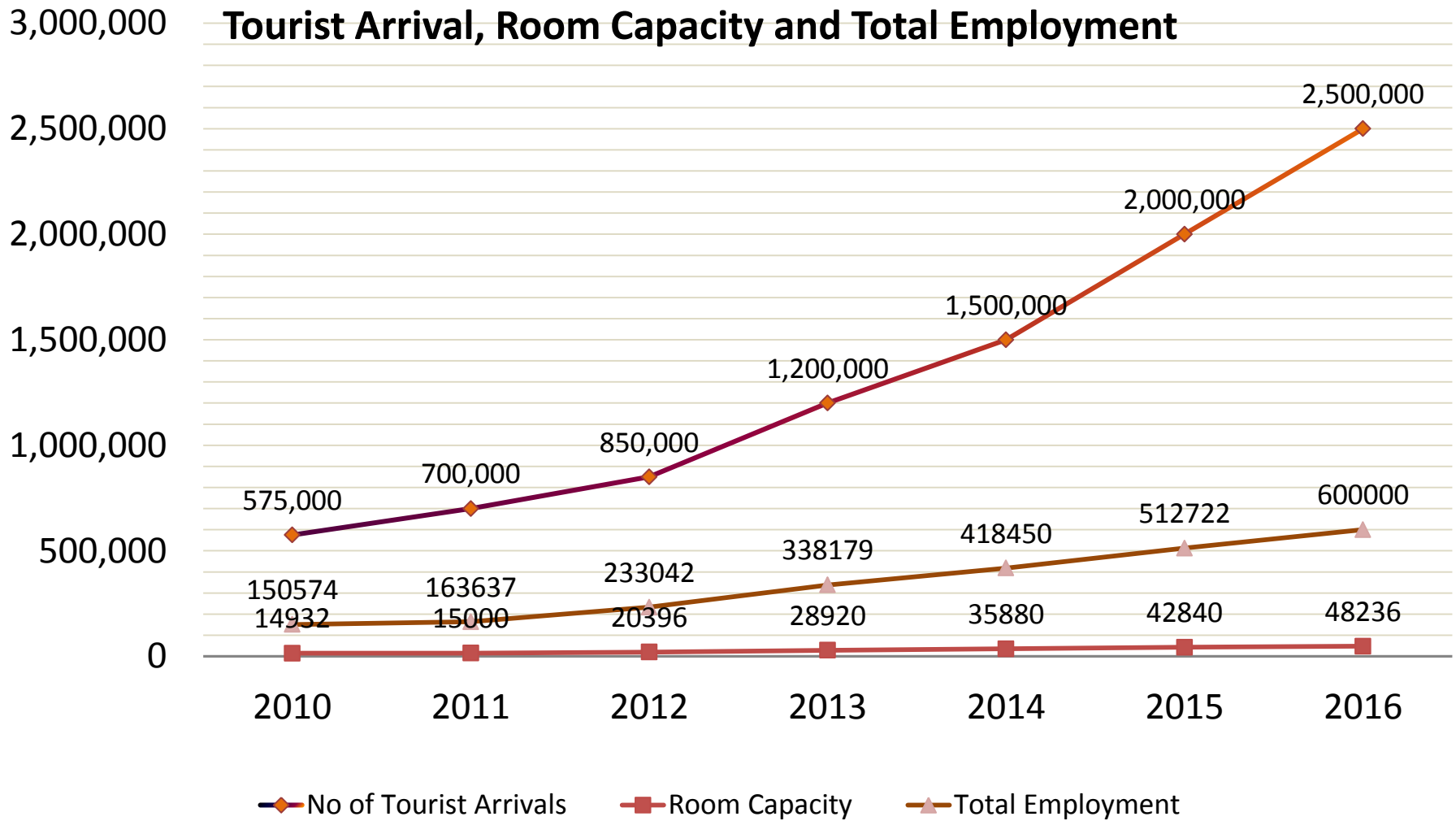
Meeting the Manpower Requirement for Achieving Tourism Targets

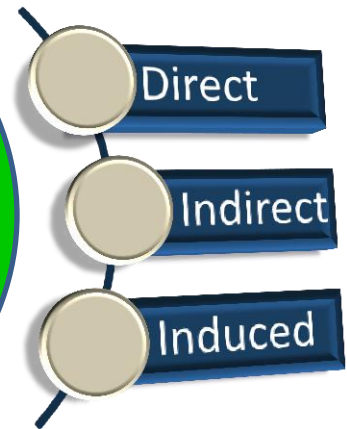
- Highly manpower intensive and people sensitive industry
- 6 to 7 tourist arrivals generate at least one tourism related job.
- Hospitality, friendliness and continuous human touch decisive for service attraction
- Providing required training and to maintain the standards and quality assurance of the industry

Targets on Sri Lanka Tourism Development (2010-2016)

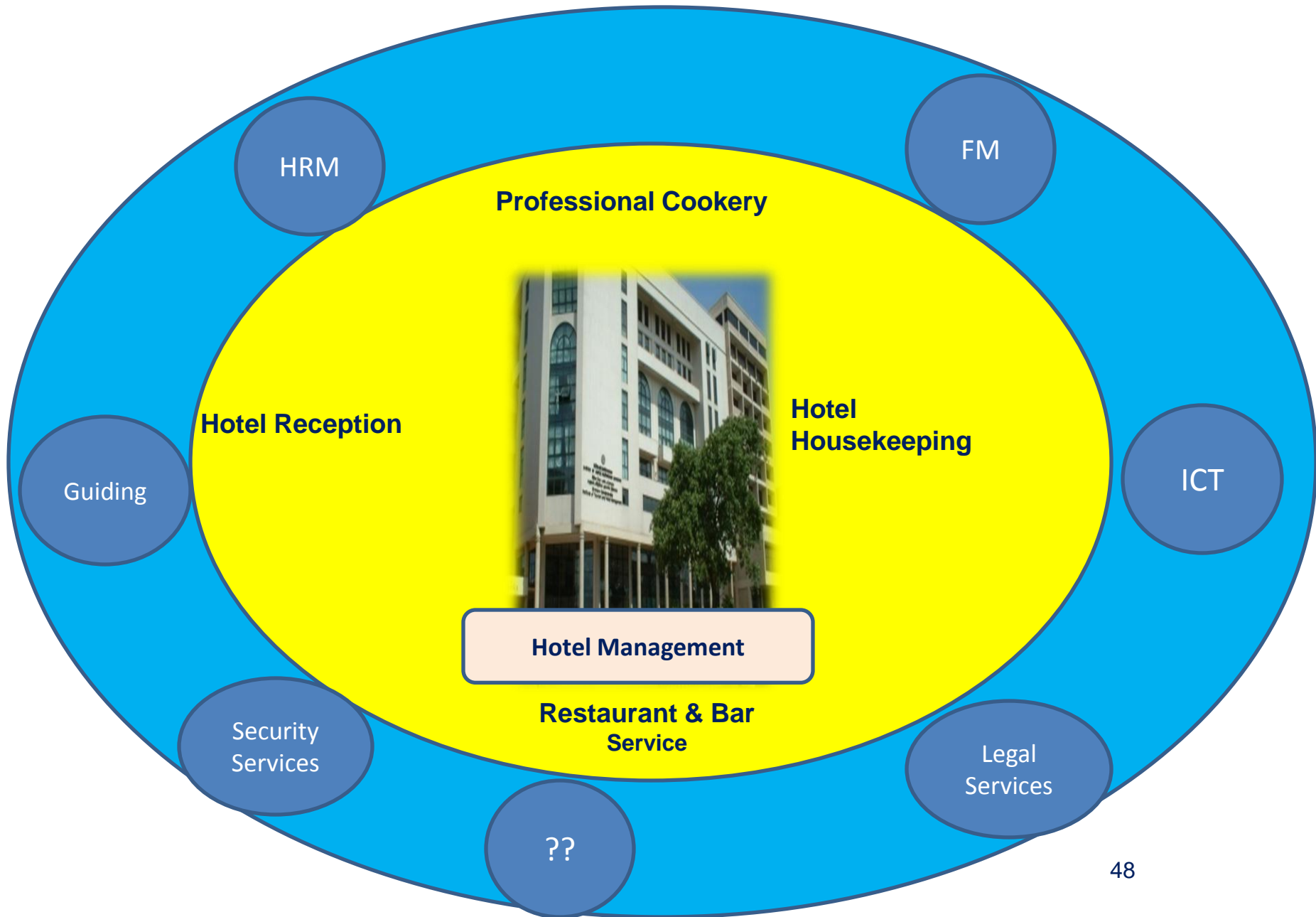
Category	2010	2011	2012	2013	2014	2015	2016
Arrivals	575,000	700,000	910,000	1,183,000	1,537,900	1,999,270	2,500,000
Employment							
Direct Employment	48300	58800	76440	99372	129184	167939	210000
Indirect Employment	66700	81200	105560	137228	178396	231915	290000
Total Employment	115000	140000	182000	236600	307580	399854	500000
Avg. Duration (nights)	8.9	8.6	8.3	8.0	7.7	7.4	7.0
Rooms Capacity	14,932	15,000	21,960	28,920	35,880	42,840	48,236
Foreign Ex Earnings (US \$ Mn)	506.1	600.0	980.0	1,360.0	1,740.0	2,120.0	2,500.0
Avg spending per tourist per day (US \$)	90.3	97.1	103.9	110.7	117.5	124.3	130.0

Tourist Arrival, Room Capacity and Total Employment





Key Human Resource Departments of Hotel Industry



TOURISM INDUSTRY - INTRODUCTION

Three Key Sectors in Hotel and Tourism Industry

Supportive Tourism And Hospitality Roles

- A. Airlines
- B. Information Communication Technology
- C. Railways
- D. Arts and Culture
- E. Retail shopping
- F. Researchers
- G. Teachers and Trainers
- H. Others (non-specified)

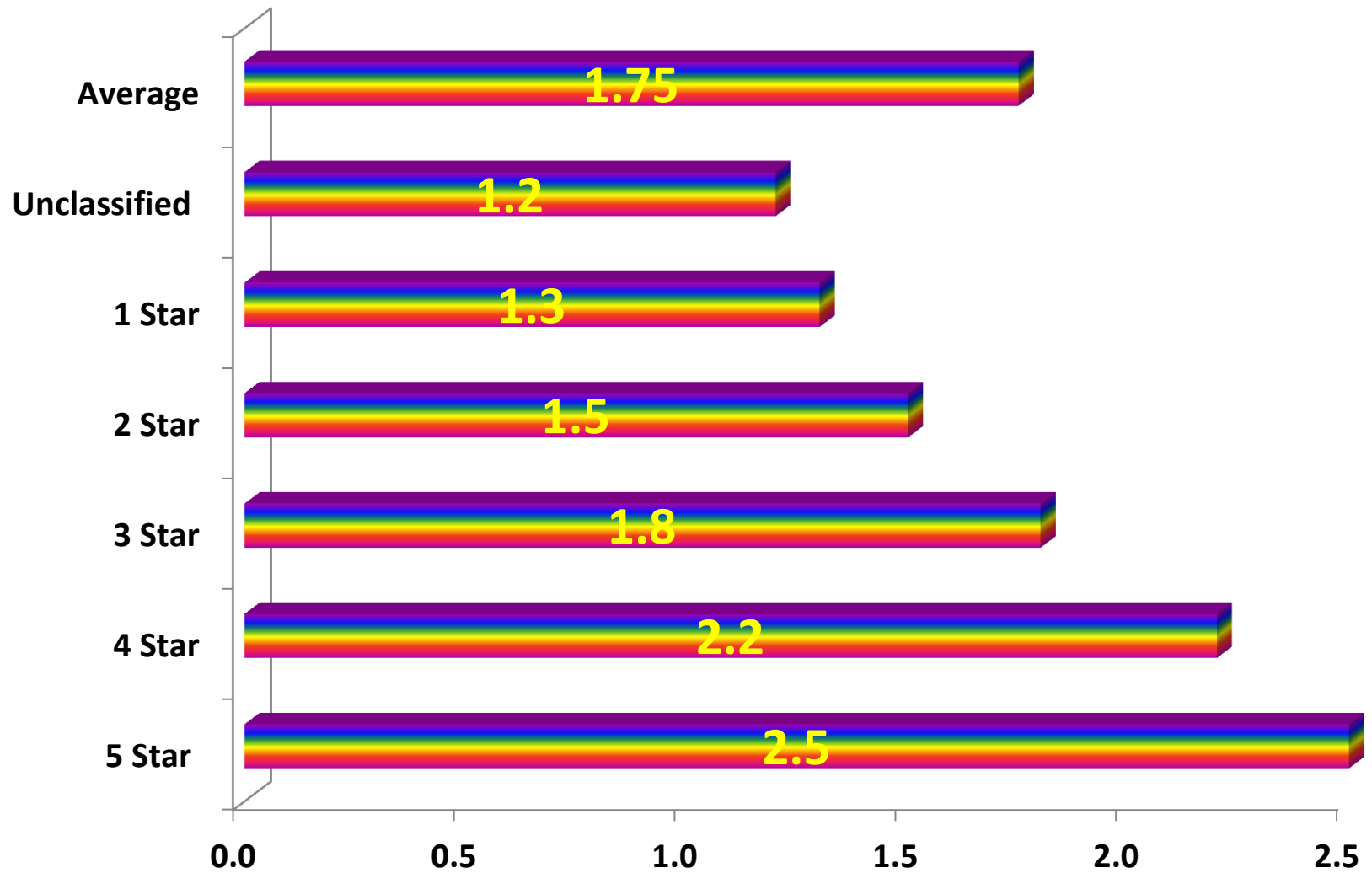
Ancillary Tourism and Hospitality Roles

- A. Charter boat operators
- B. Limousine and Taxi Drivers
- C. Adventure and Dive
- D. Sales and Marketing
- E. Accounting
- F. Human Resources
- G. Electricians
- H. Caravan Park Operators
- I. Cruise shipping
- J. Others (non-specified)

Essential Tourism And Hospitality Service Roles

- A. Housekeeping
- B. Food and Beverages
- C. Kitchen / Catering Operations
- D. Tour Guides
- E. Front Office duties
- F. Public area cleaning
- G. Gaming Attendant
- H. Concierge
- I. Cellar

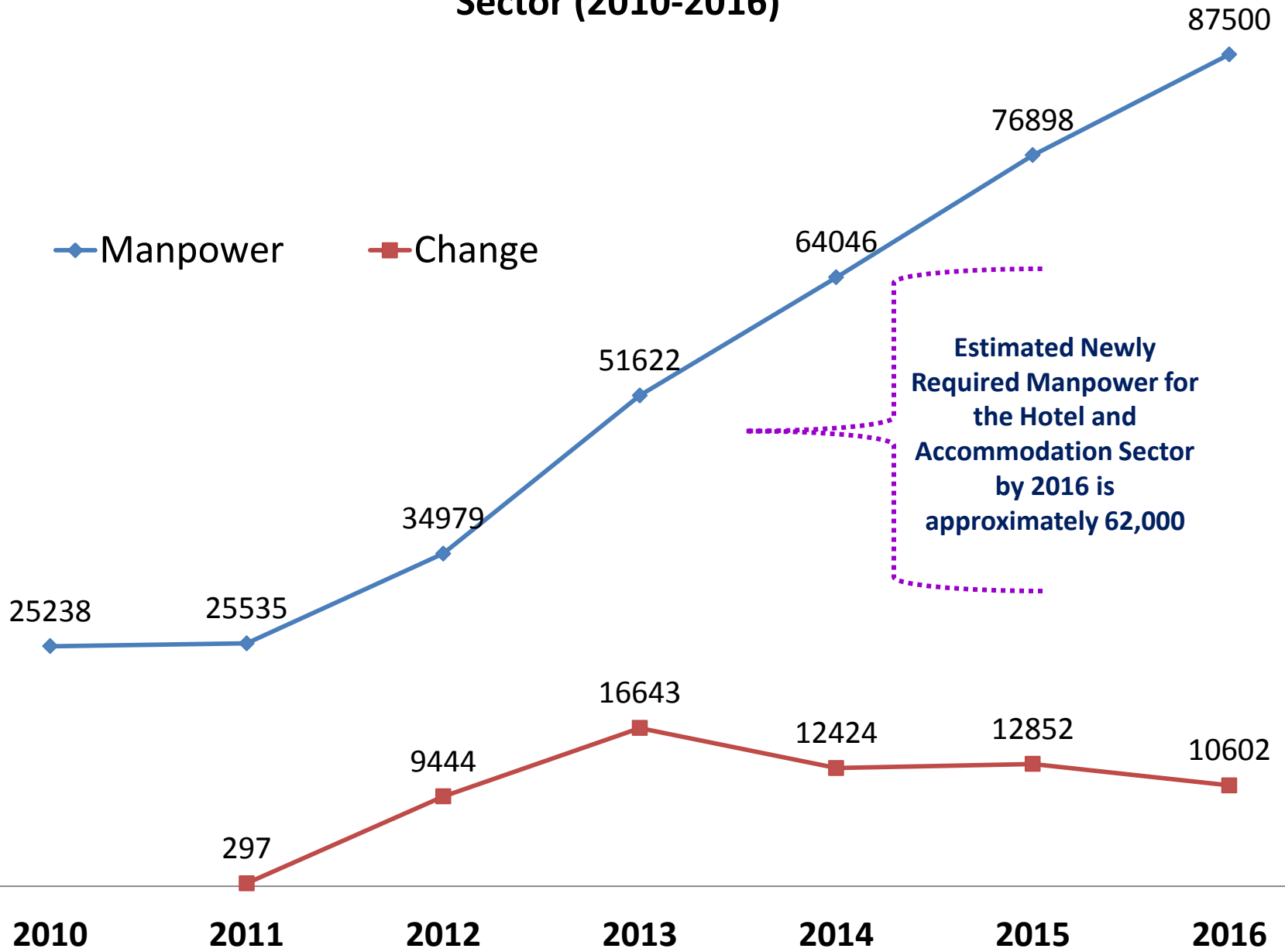
Employees Per Room BY Classifications of Accommodation



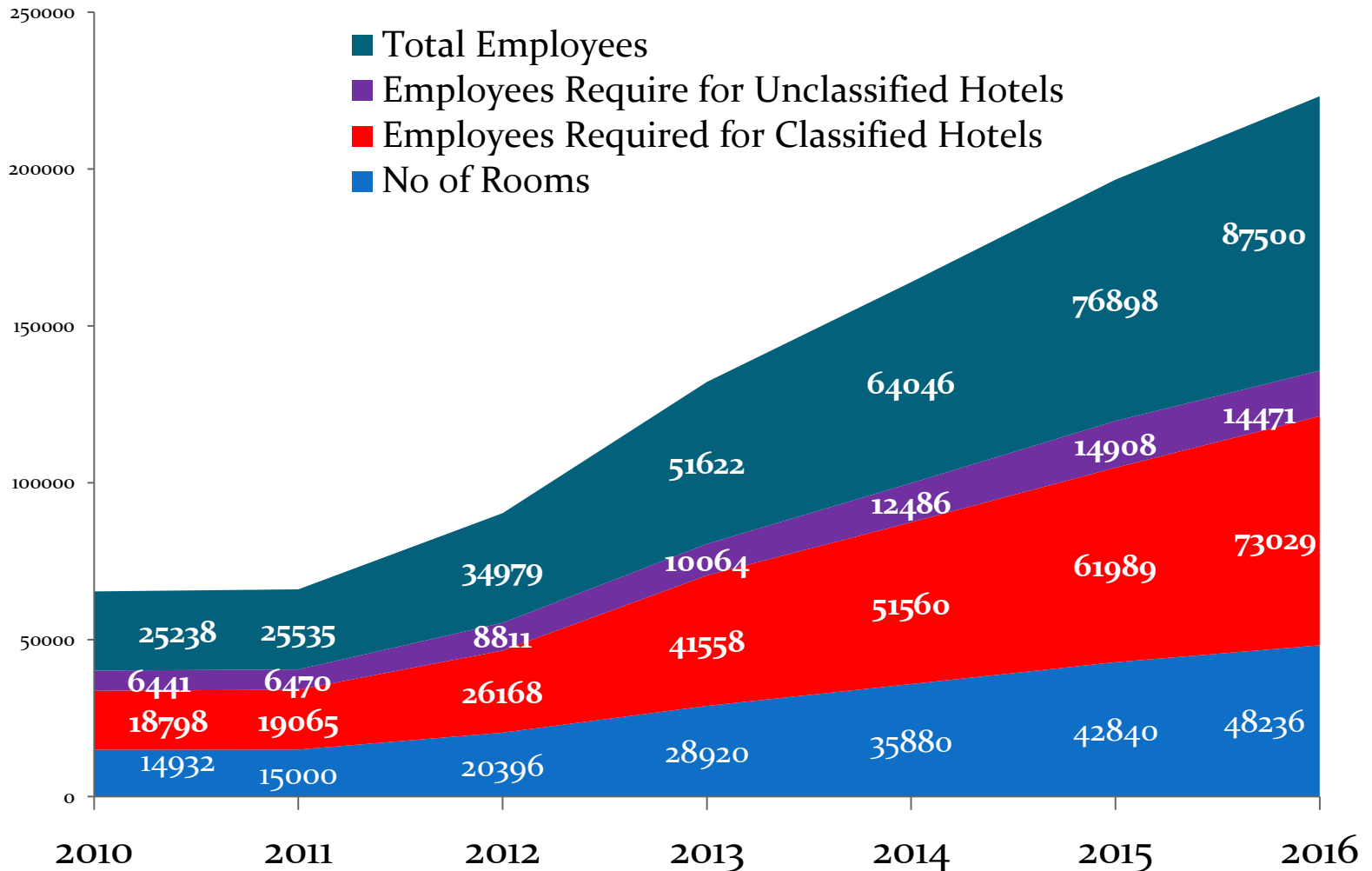
Expected Human Resource Development of Sri Lanka Hotel Industry



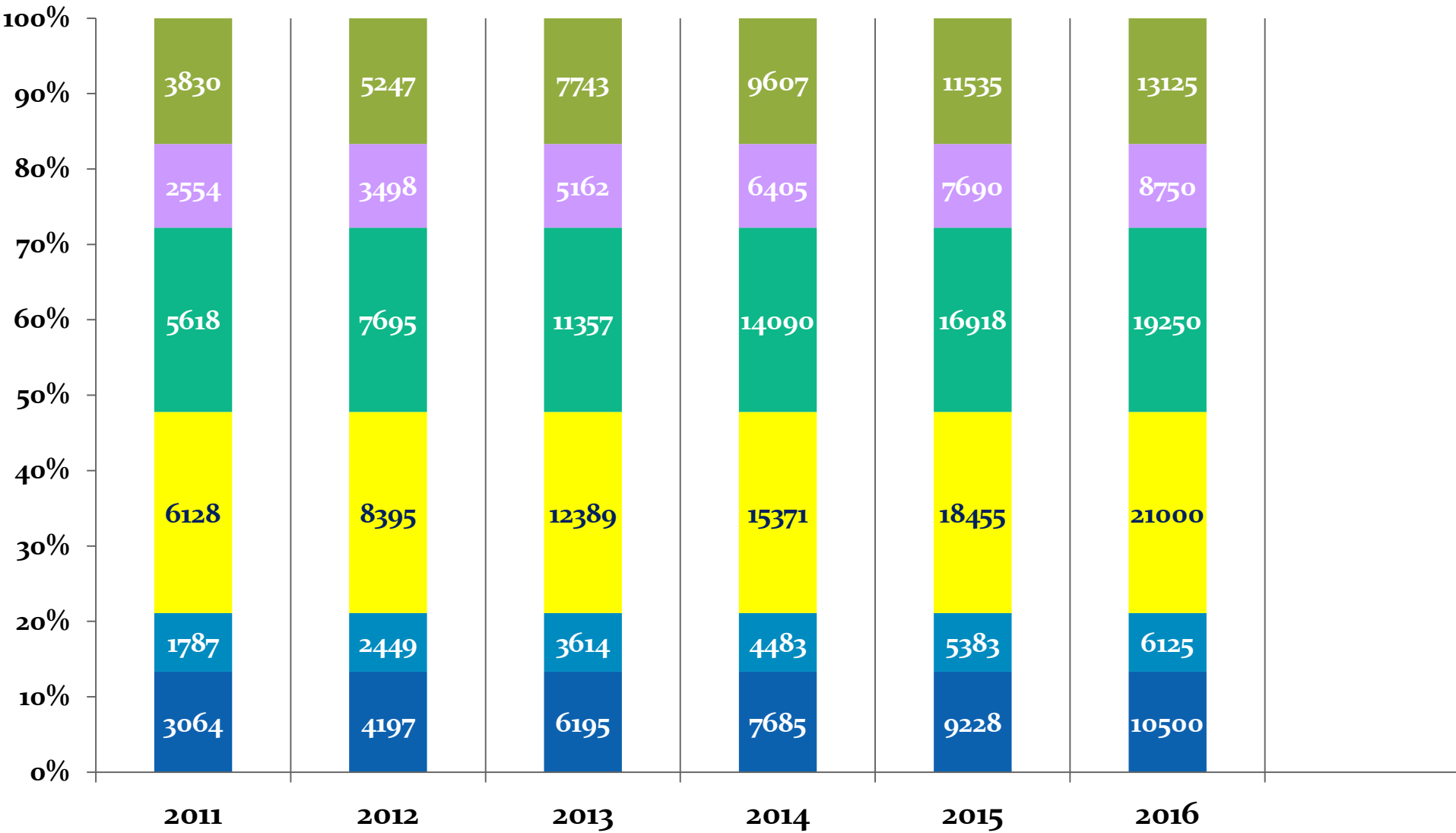
Manpower Requirement for the Hotel and Accommodation Sector (2010-2016)



No of Trained Employees and Forecasted Accommodation Services (2010-2016)



Classification of Employment by Different Departments



■ Housekeeping (12 %)

■ Front Office (7 %)

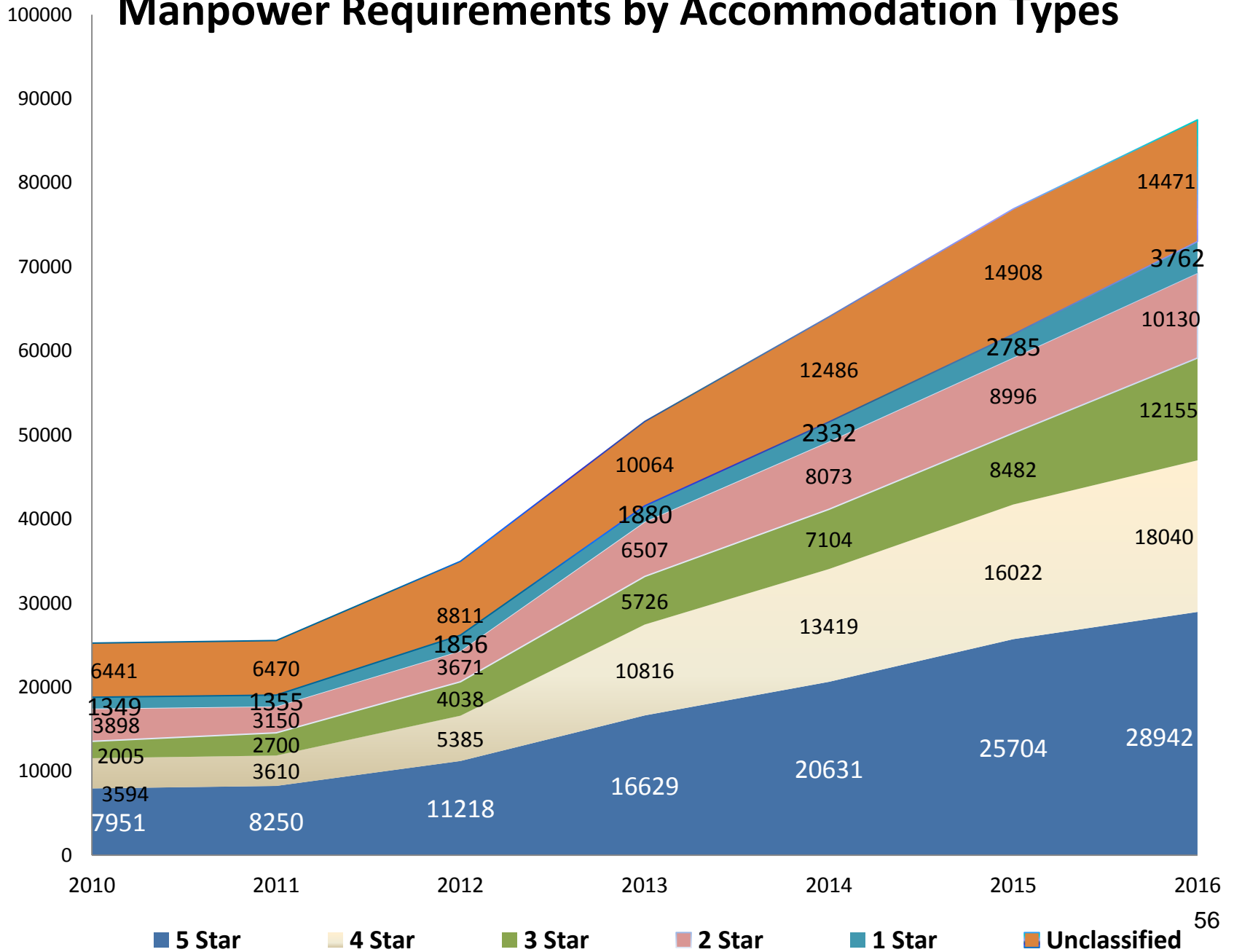
■ F&B (24 %)

■ Coockery (22 %)

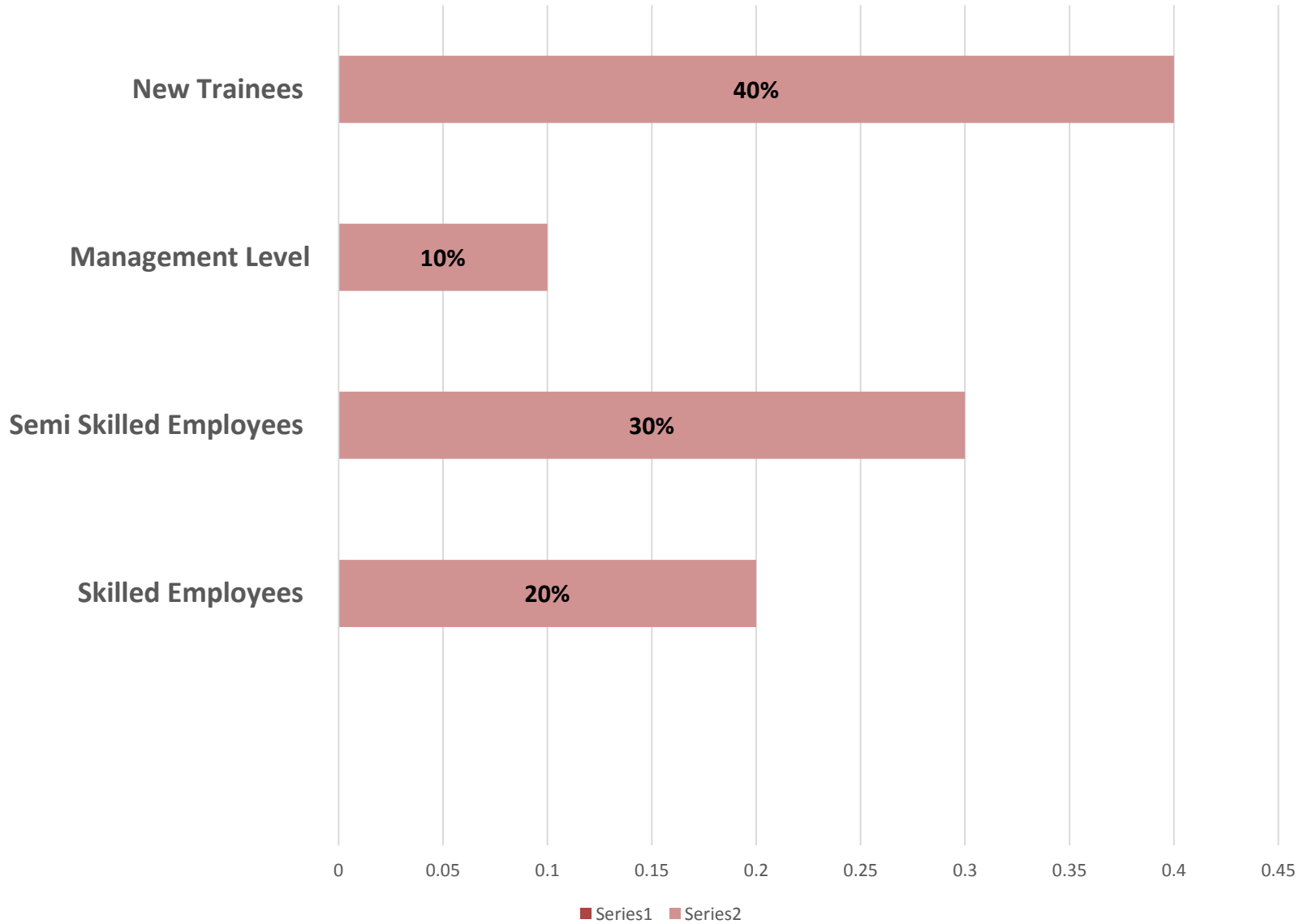
■ Finance & Account (10 %)

■ Maintance (15 %)

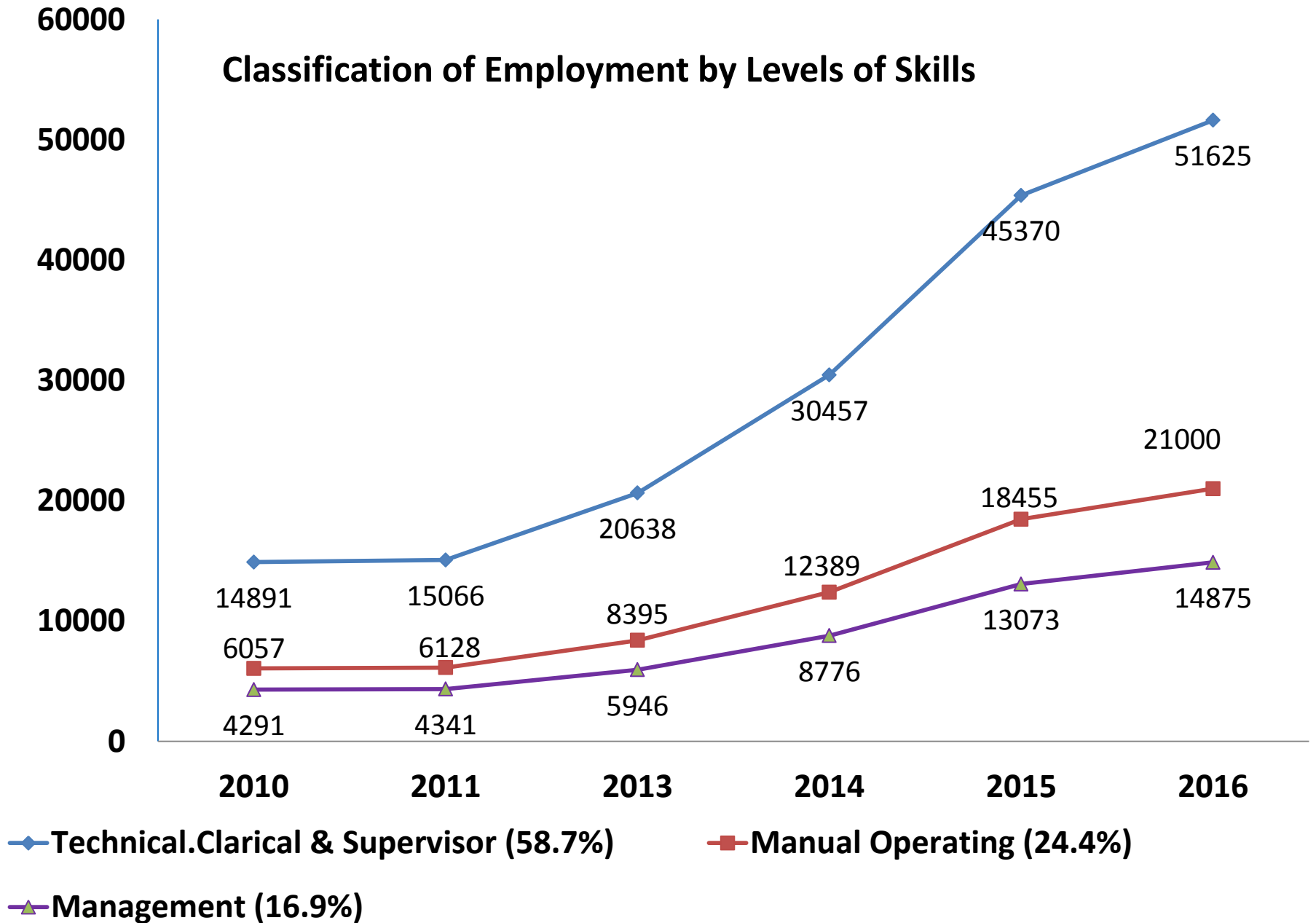
Manpower Requirements by Accommodation Types



Tourism Manpower Requirement by Different Skill Levels



Classification of Employment by Levels of Skills



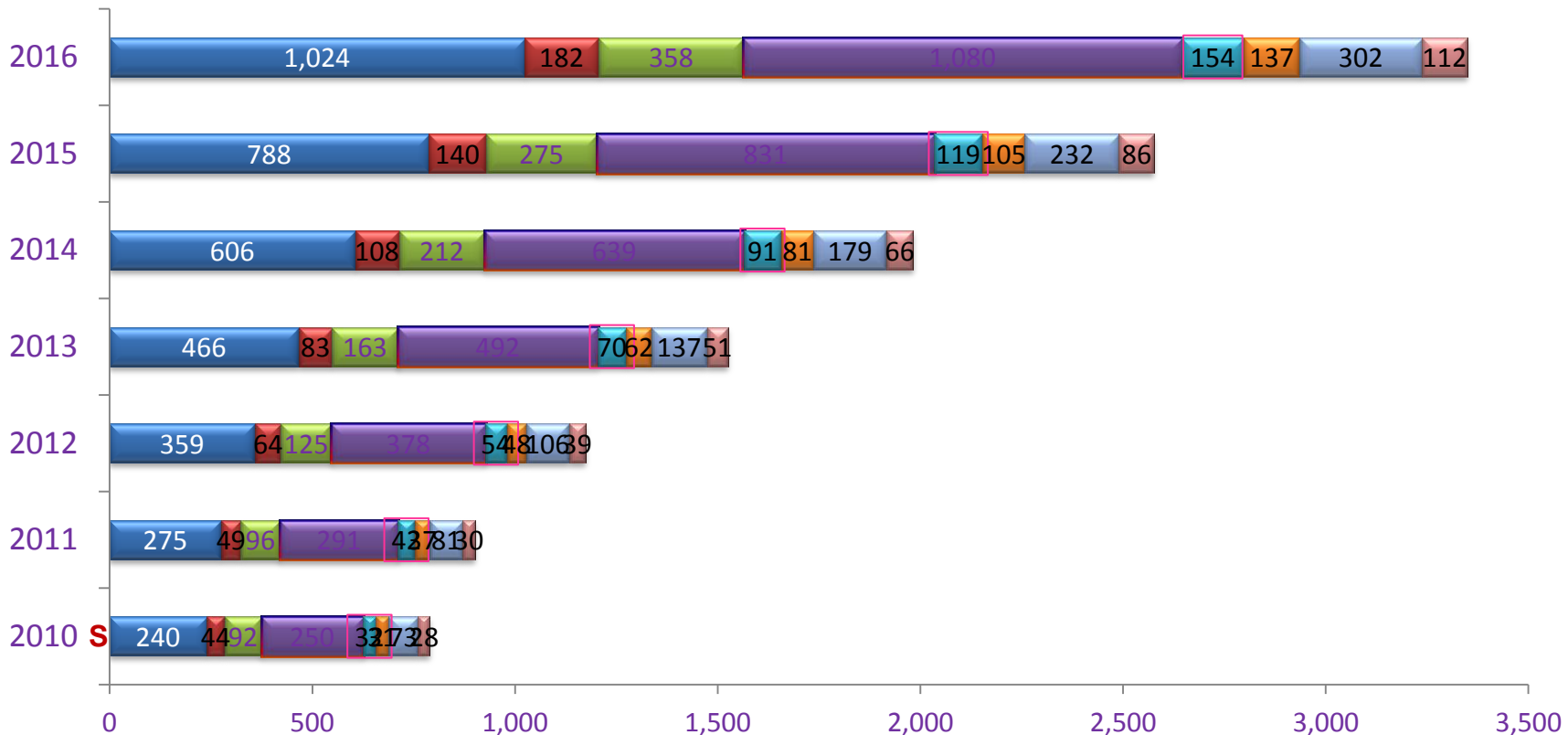
Required National and Chauffer Guides by 2016

	2009	2010	2011	2012	2013	2014	2015	2016
Tourist Arrivals (000)	448	575	700	910	1,183	1537	1,999	2,500
Arrival growth rates			20.10%	21.40%	29.20%	20%	25%	20%
Forecasted Supply of guides		2380	2540	2780	3020	3260	3500	
Required No of Guides		1198	1458	1896	2465	3204	4165	5208



Required Number of Tour Guides for Different Tourist Origin Countries/Nations

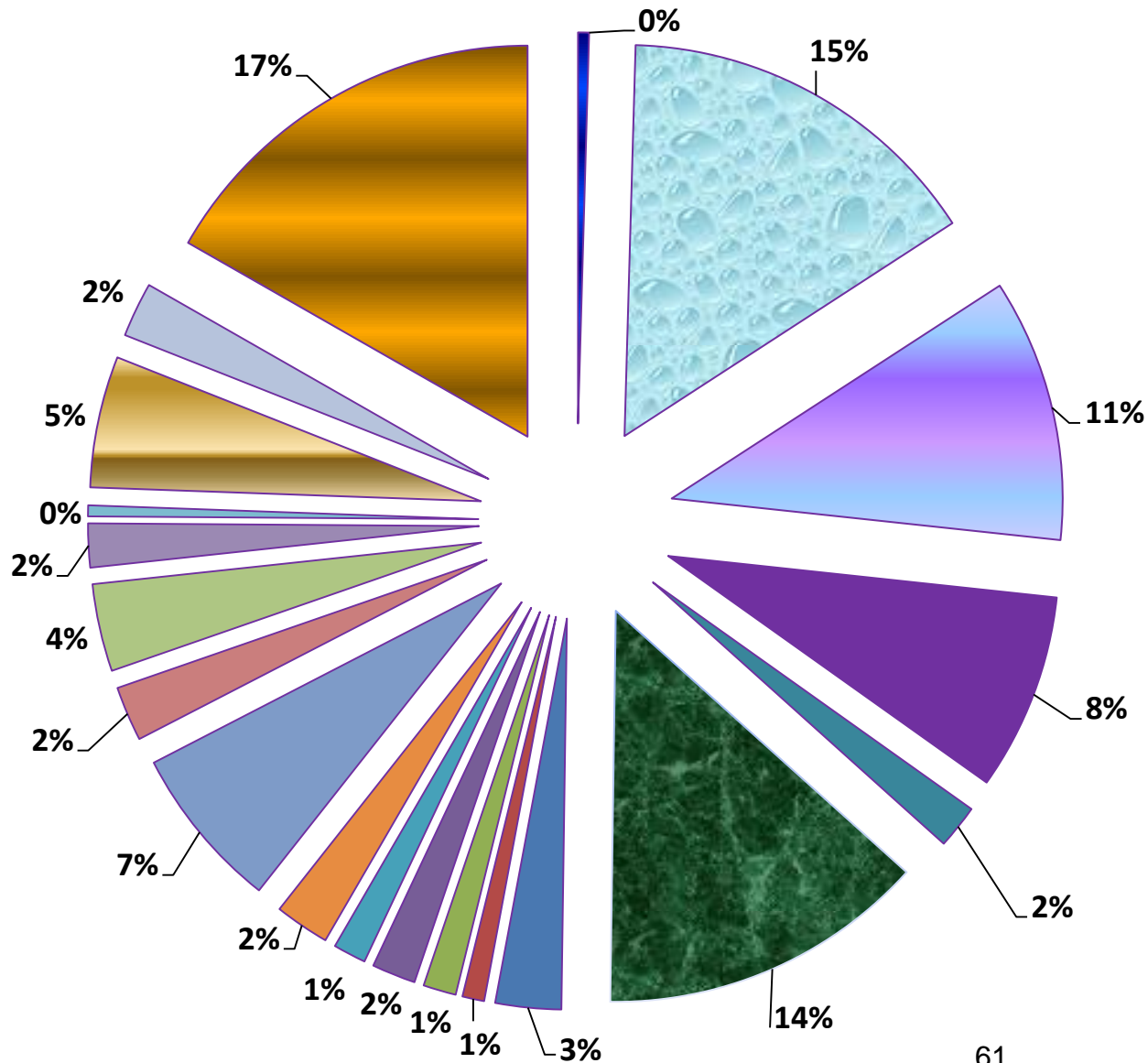
United Kingdom France Germany India Russia Japan Middle East China



The Findings of News Paper Survey

(03rd January 2013 to 13 August 2013)

- Super manager level
- Manager level
- Executive
- Office related
- Executive Chef
- Chef
- Cooks
- Housekeepers
- Barman
- F&B
- Waiters/Waitresses
- Receptionists
- Stewards
- Trainees
- Maintaince
- Guest relation
- Hostesses
- Supervisors
- Room Boys
- Others



Current Annual Average Manpower Training for Hotel Management in Sri Lanka

- **Current Total Manpower Training \approx 5000**
 - SLITHM \approx 1500 personnel
 - Other Government Institutes/Organizations \approx 1500 personnel
 - Private sector tourism training and education Institutes \approx 1000 personnel
 - In-House Hotel Operation \approx 1000
- **Required Manpower Training (Annually Average) \approx 13000**

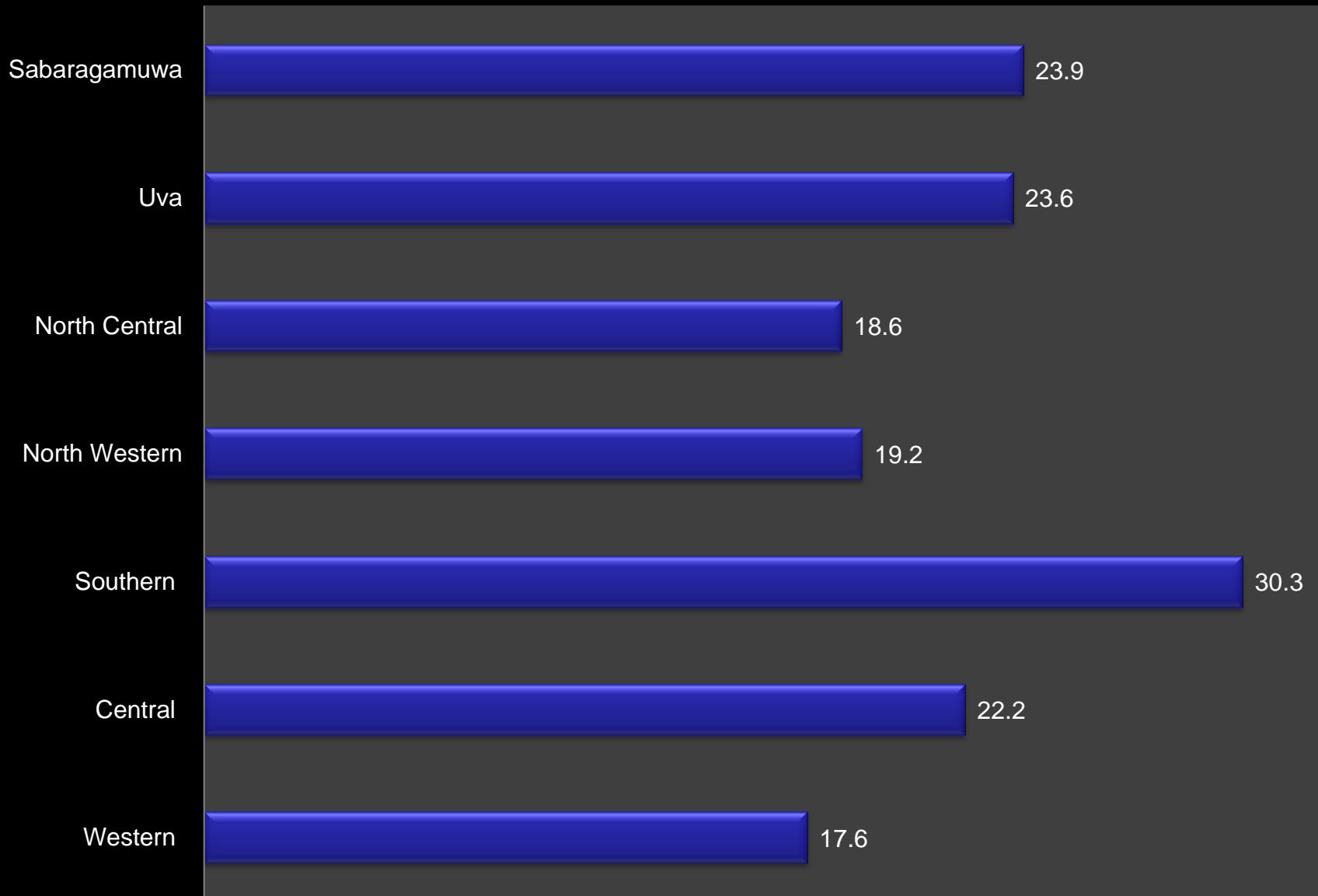
It is important to examine whether Sri Lanka can meet this manpower requirement or not?

- **What are the major challenges to be faced?**
- **What are the most effective strategies that can be used to meet such challenges?**
- **How do the private and public sectors responsibly react with such challenges?**
- **What is the role of communities involved with tourism in this context?**

Major Challenges

- **Low paid and low wages jobs**
- **Seasonal and temporary jobs**
- **Lack of training facilities**
- **Lack of private sector investments and involvement**
- **High labour turnover**
- **Social biasness and language barriers**
- **Negative social attitudes on tourism employment, more specifically in women employment..**

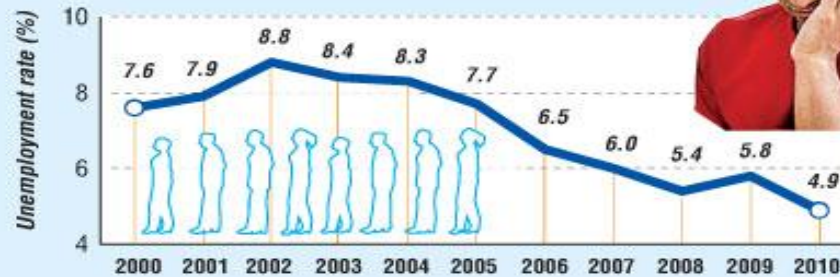
Unemployment Rate of Young People Aged (Between 15 - 24 years) in rural area is significantly high



UNEMPLOYMENT SITUATION IN SRI LANKA



► In 2010, estimated economically active population is around eight million and about five million (66%) of them are males. Majority among the economically inactive population are females (70%).



► Unemployment rate by age group and sex

Age group	Total	Male	Female
15 - 24	19.4	16.3	24.7
25 - 29	9.2	4.7	17.8
30 - 39	3.1	1.7	5.8
Over 40	1.0	0.8	1.4

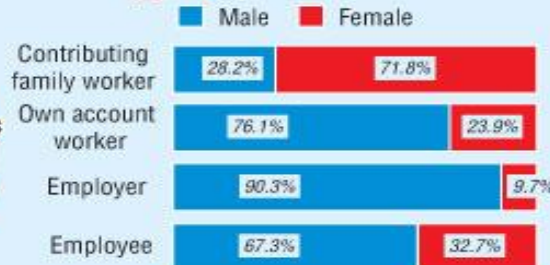
► Unemployment rate by sex



► Distribution of employed population by main industry



► Percentage distribution of employment status by gender - 2010



⊙ Unemployment rate among the educated group [G.C.E(A/L) and above] is reported to be 11.6 percent. It is 7.9 percent and 15.8 percent for male and female respectively. This reveals that the problem of unemployment is more acute in the case of educated females than males

Level of education	Unemployment rate		
	Total	Male	Female
Total	4.9	3.5	7.7
Grade 6-10	3.6	2.8	5.8
G.C.E. (O/L)	6.9	5.4	10.1
G.C.E. (A/L) & above	11.6	7.9	15.8

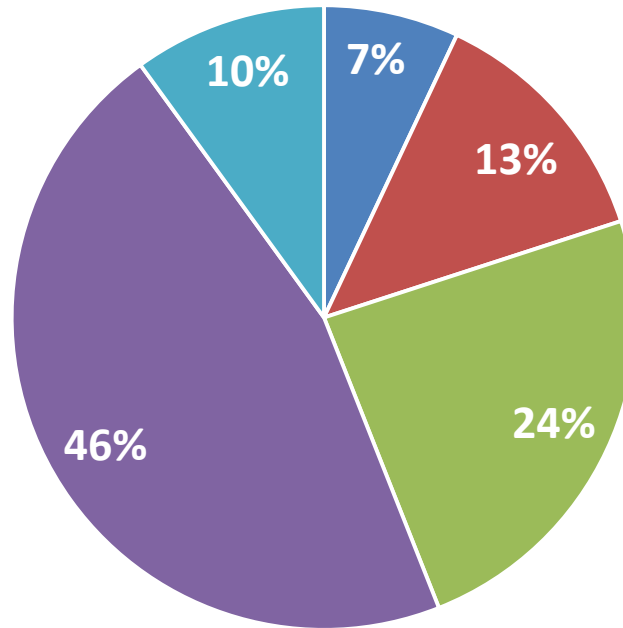


Foreign Labour Migration and Annual Manpower Training Outputs

Occupation	Annual manpower training by training institutes (a)	Foreign Employment*	Foreign employment as % of annual manpower training output
Chef	167	109	65%
Housekeeping	1800	51	3%
Cook	2650	577	22%
Waiter	2900	645	22%
Total	7517	1382	18%

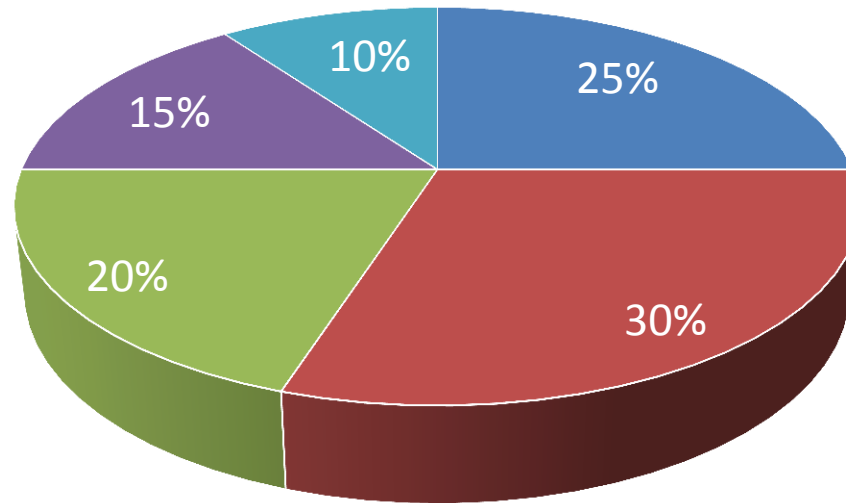
* Source: Findings of Survey (2011) and Labour market information bulleting (December 2010)

Community Awareness on Tourism Job Opportunities



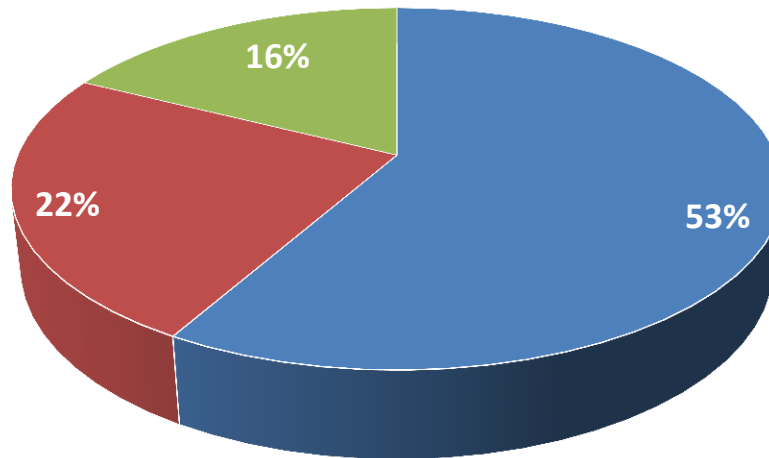
■ Very High ■ High ■ Reasonable ■ Poor ■ Very poor

Barriers to Obtain jobs in Hotel Industry



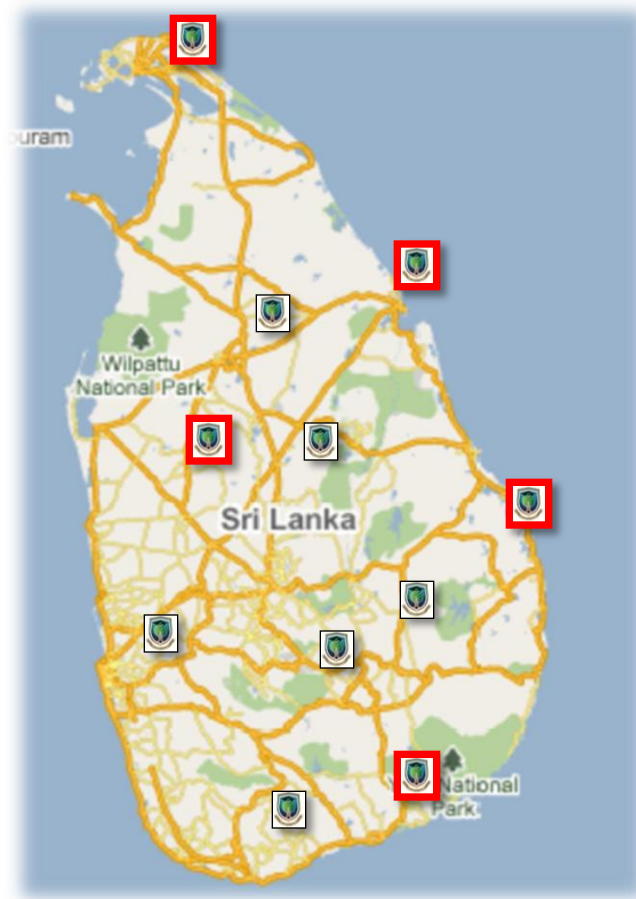
- Poor communication through English language
- Lack of training facilities
- Less acceptance by the society
- Lack of income and job insecurity
- Other reasons

Community Views On: Three major suggestions for higher community involvement

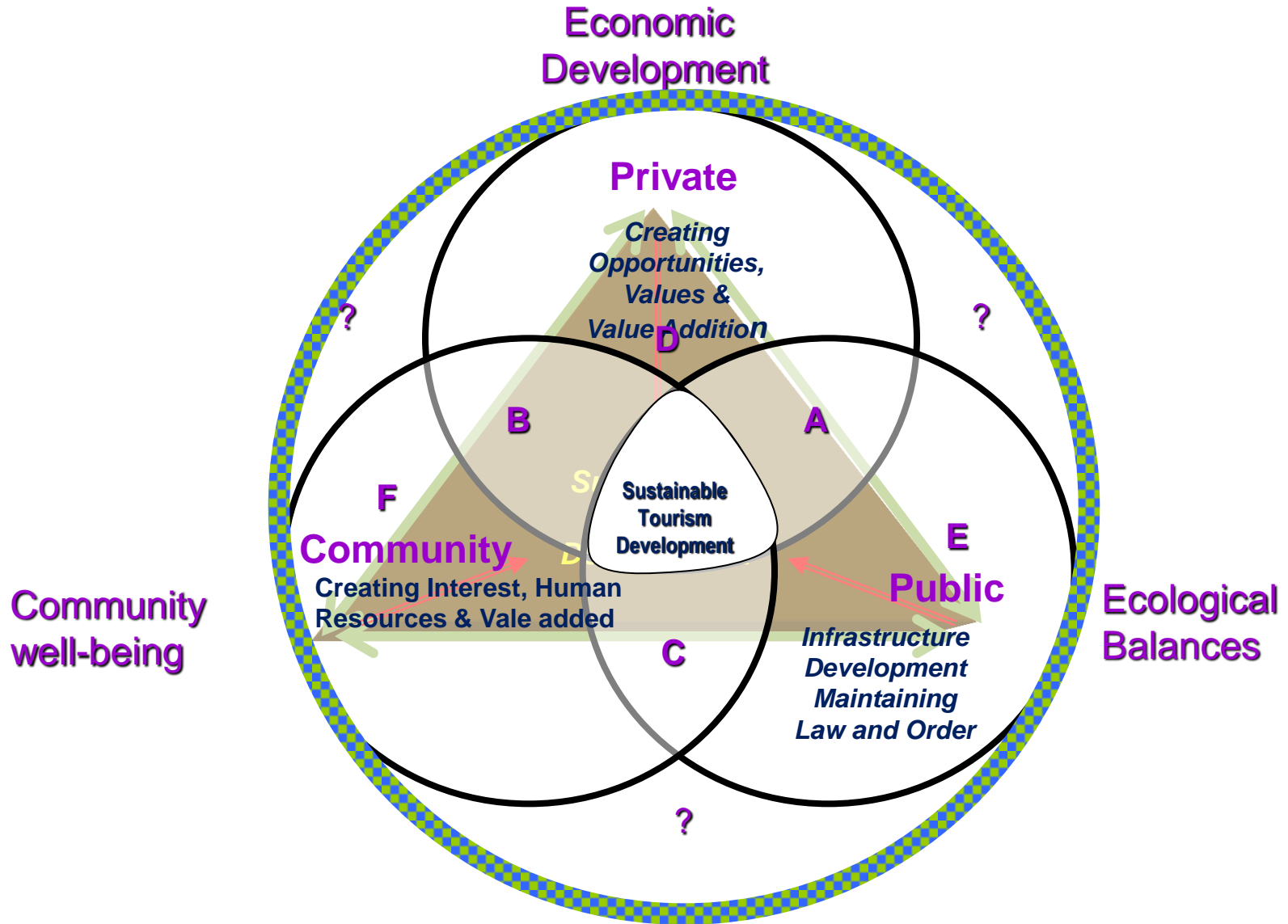


- Improve the training facilities including for foreign languages and educational programmes
- Develop new opportunities for community involvement and empower community organizations
- Ensure better income and job security

Required Tourism Manpower Training Centers



Public-Private and People Partnership (PPPP) for Manpower Development for Tourism Industry

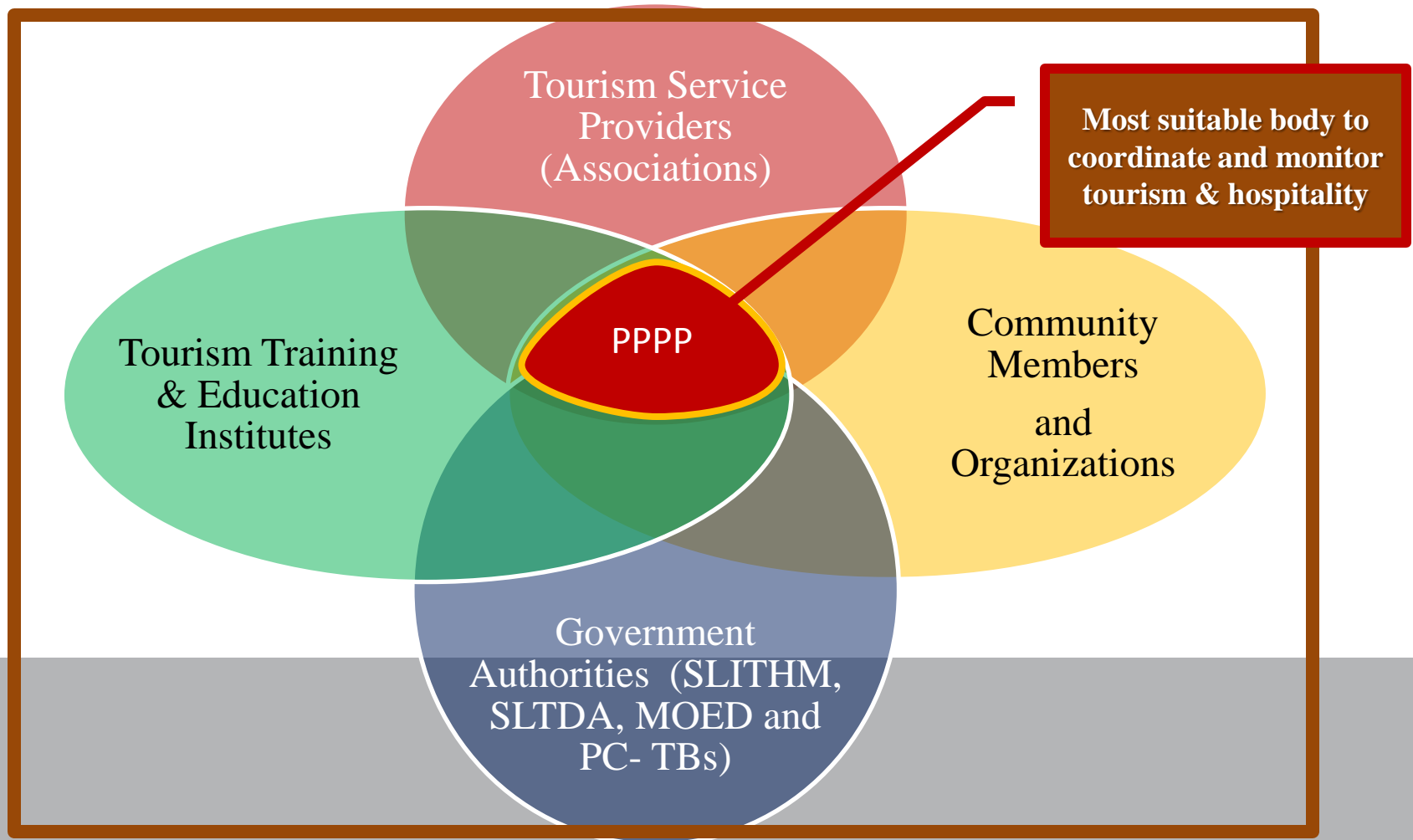


KEY STRATEGIES FOR MANPOWER DEVELOPMENT



CONCLUSIONS AND RECOMMENDATIONS

✦ Key Stakeholders for Tourism Manpower Development in Sri Lanka



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Thank You.

