



## TOURISM IN THE NETHERLANDS



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## 1.0 TOURISM IN THE NETHERLANDS

### 1.1 The tourism sector in The Netherlands

#### Dutch travel & tourism market (domestic & outgoing)

81% of all Dutch people go on holiday with an average frequency of 2.79 holidays, resulting in 35.6 million holidays. Among domestic tourists the North Sea resorts and beaches are the most popular (12%), followed by the nature park the Veluwe (12%), the Northern provinces (11%). 75% of all spent is on long holidays abroad (11.7 billion), on short holidays 0.9 billion is spent. On domestic travel 65% is spent on long holidays (1.8 billion) and 35% on short travel. Evidently the biggest expenditure is done during summertime 9.6 billion (8.8 billion on long, 0.8 on short holidays) compared to 5.8 billion during wintertime (4.7 billion long vs 1.1 billion short).

Table 1.1.1 Dutch tourism market

Dutch tourists	Long (> 4 days) in million	Short(1-3 days) in million	Total in million	Expenditures in billion
Domestic:	8.3	9.2	17.5	2.8
Winter	2.8	4.6	7.4	
Summer	5.5	4.6	10.1	
Abroad	14.5	3.6	18.1	12.6
Winter	5.2	2.2	7.4	
Summer	9.2	1.5	10.7	
Total	22.8	12.8	35.6	15.4

Source: CBS, 2014 & NRIT Media, 2014

#### Incoming / foreign tourism market in the Netherlands

There were 12.8 million foreign tourists originating primarily from European countries (81%), headed by the neighbouring countries: Germany (27.3%), Belgium (13.1%) and the U.K. (13.1%).

Among foreign tourists the provinces North and South Holland are the most popular with 87% of all foreign tourists and 84% of all foreign overnights; 52% of all foreign tourists stay in the province North-Holland, with Amsterdam as the most popular destination. South Holland follows as second best with 1,5 million arrivals (13%). Third rank both the provinces Brabant and Zeeland with each 800.000 foreign tourists.

Table 1.1.2 Incoming tourism market

Foreign tourists	in million	Average spent/stay
Leisure	9.6	
Business	3.2	
Individual	75%	507 euro
MICE	25%	701 euro
Total	12.8	

Source: CBS, 2014 & NRIT Media, 2014

The majority of the business travellers come from Great Britain, Belgium and the USA, as well as from Germany and France, both also important tourist providers.

North-Holland has the biggest share of all business travel with 6.7 million overnights i.e.

42% of all business travel thanks to the fact that Amsterdam welcome 25% of all business travel overnights. In general, 43% of the registered overnights derive from business travel.

The total spending of the Dutch tourism sector is 65 billion euro. This amount includes the spent for outgoing travel booked/bought in the Netherlands. The total added value is 23 billion, i.e. 3.6% of GDP.

The most important trends within the hospitality industry:

**Internationalization**

- International market players, more international guests, global developments: professionals have to be able to cope with international context and translate this to needs and wishes at local circumstances and individuals

**Technology & innovation**

- Rise of new technology and digitalization
- New media
- Hybridization – hybrid networks & business models
- Experience economy

**Sustainability**

- CSR (corporate social responsibility)
- Increase of costs due to ecology trends
- Sustainability

**Labour market**

- High interest in low qualified employees, less attractive to high qualified people – less managerial jobs, displacement of low qualified staff by high qualified
- Increase of flexible work staff

**Profile of professionals**

- Able to empathize with wishes of guests/clients and to think and handle in added value & original concepts – eye for cultural, age-related and financial differences between people.
- Need to be able to think innovatively, disruptive innovations
- People management – to be able to motivate others
- Global thinking, translating in local needs & wishes
- Entrepreneurship
- Maintaining of stakeholder management (networks)
- Able to think over boundaries of own profession/sector

Table 1.1.3 SWOT Analysis of tourism in The Netherlands

<b>SWOT ANALYSIS</b>	
<b>STRENGTHS</b>	<b>WEAKNESSES</b>
<ul style="list-style-type: none"> <li>• Growth sector</li> <li>• Diversified &amp; high quality offer</li> <li>• Qualified employees on various levels</li> </ul>	<ul style="list-style-type: none"> <li>• Adaptability to changed needs &amp; wishes</li> <li>• A lot of small, family managed companies</li> <li>•</li> </ul>
<b>OPPORTUNITIES</b>	<b>THREATS</b>
<ul style="list-style-type: none"> <li>• Need for low qualified staff</li> <li>• Cross-sectorial developments</li> <li>• Internationalization (guests as well as labour market)</li> <li>• New products and services</li> <li>•</li> </ul>	<ul style="list-style-type: none"> <li>• Competition (offer as well as labour market)</li> <li>• Inflexibility to adapt quick enough (education as well as market)</li> <li>•</li> </ul>

## 1.2 Tourism employment and skills

In 2013 the tourism sector provides 590.000 jobs, equalling 357.000 FTE's. Tourism sector provides 5.1% of total employment (CBS, 2014).

### Employment

In 2013 the tourism sector provided 590.000 jobs, equalling 357.000 FTE's. Tourism sector provided 5.1% of total employment (CBS, 2014).

Table 1.2.1 Percentages of employees Figure 1 Employees per sector per sector

Employees within hospitality industry	%	FTE X 1000
Hotel & catering industry	47%	168
Sport, recreation	12%	43
Art & culture, hobby's	10%	36
Airlines, travel & tourism companies	6%	21
Other supporting hospitality industry	25%	89
<b>Total</b>		<b>357</b>

Source: CBS, 2014 & NRIT Media, 2014

### Hotel & Catering Industry

The hotel & catering industry counts more than 45.000 companies, a number still growing, providing almost 332.000 jobs equalling 170.000 Fte's. 60% of these jobs may be found in restaurants and bars (Research, 2015).

Simultaneously and in contrast to this, the number of bankruptcies also increased strongly. Especially the sector of bars and caf es shows a big decrease of the number of bars/caf es (12% in period 2009-2014). In the party catering there is an increase in companies with a probable shift of people employed into people working as independent caterers.

53% of the employees are female and this percentage is even higher in the sectors fast service and party catering.

The average age in this hotel & catering industry is 31 year. Average income is 18.000 euro/year being the net income for 1 Fte.

Table 1.2.2 Jobs in hotel & catering industry

Hotel & catering industry	Number of jobs in 2014	%
Bars, caf�es	95.362	29
Restaurants	101.122	30
Fast service	64.607	20
Hotel	62.625	19
Party catering	8.022	2
<b>Total</b>	<b>331.738</b>	<b>100</b>

Source: ABF Research, 2015

### Travel & Tourism industry<sup>1</sup>

In 2013 there were 3240 travel & tourism organisations: 2060 travel bureau's /agencies and 1180 tour operators. 47% of these were member/partner of a franchise-formula or a purchase-association/collaboration. The number of organisations is growing while the size (number of employees per company) is diminishing.

Some other data:

- The number of employees working in the industry is 11.800 Fte. This number lowered enormously due to several (big) bankruptcies in 2013. A small growth is forecasted for 2014.
- The entrance, rotation, and leaving, in short, the mobility of employees was reduced to 50% of its mobility level in 2003: employees choose for job security and did not leave their employer<sup>2</sup>.
- In 2014 there is an increase of vacancies; employees for automation/ICT vacancies within hospitality industry are difficult to provide.
- Absenteeism is far beyond the national average and is stable at 2.1% at a historical low.
- Part time contract has been decreasing in 2013. The percentage of part-timers increased to 54%.
- Traditionally the industry employs a high percentage of women: 76%.
- In the travel & tourism industry the number of independent travel agents is steadily growing. In 2013 there were approximately 500 independent travel agents. Many of them are member of the ANVR<sup>3</sup>.
- Although the number of sales and after sales employees is still considerable, the number is strongly diminishing due to the increase of Internet bookings. Within the sales and after-sales function there is a shift from reception desk employee to call centre employee.
- Part time contract has been decreasing in 2013. The percentage of part timers increased to 54%.
- Percentage of highly educated employees is growing: in 2012 34% had a higher vocational education (university of applied sciences or university) compared to 28% in 2003. This percentage is increasing steadily.  
(Reiswerk, 2015)
- In the hotel & catering industry there will be a growth of approximately 2000 jobs  
(UWV, 2015)

Table 1.2.3 Jobs in travel & tourism industry

Travel & tourism sector	2013
Purchase, product management etc.	8%
Logistics (traffic, yield en allotment policies etc.)	4%
Sales and after sales (reception desk, call centre, client service, complaint handling etc.)	52%
Subdivided in:	
Reception desk	16%
Call centre	36%

<sup>1</sup> All data for the travel & tourism industry come from the Reiswerk dashboard (Reiswerk, 2013).

<sup>2</sup> Labour law and employee law are traditionally very well organised in the Netherlands in favour of the employee. Under the actual coalition in the government some substantial changes are being made.

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<sup>3</sup> The Dutch association of travel & tourism organisations

Support (HRM, administration, facility etc.)	9%
Automation/ICT	5%
Health & Safety	0%
Marketing (online & offline)	4%
Legal	0%
Sales- & account management	5%
Quality & project management	1%
Direction/management	9%
Other	4%

Source: Reiswerk dashbord, 2015

### Leisure & Recreation<sup>4</sup> (L&R)

The L&R sector may be divided in

1. Accommodation recreation sector and the day/sport recreation sector;
2. Water sport industry;
3. ANWB & VVV<sup>5</sup>.

In the accommodation recreation sector (1), there are 5.145 companies such as camping's, holiday houses & youth hostels. The day/sport recreation sector counts 310 swimming pools, 795 sport accommodations, 320 outdoor sport companies and 305 attraction parks. 50% of the employees working in these companies are low educated whereas a few years ago the majority had an average education level (Kenwerk, 2015).

In the water sport industry (2) there are 4000 companies: shipyards, marina's, sailing schools, architects, importers of motors, yachts, etc., experts, maintenance companies etc. (Hiswa, 2014); 11.656 people worked in it (Ecorys, 2014).

Reservation- and travel & tourist information offices are part of the ANWB and VVV organisations with 1.090 offices in 2013. ANWB shops decreased from 112 to 76 shops/offices in 3 years time; the number of employees was stable with approx. 4.832 employees. The VVV had a bigger decrease in shops/offices: from 238 to 167 in 2013. They focus on digitalization of information. (Kenwerk, 2015)

In the sector culture and recreation there will be no growth but a stabilization of jobs (UWV, 2015).

The most important skill gaps or shortages of skilled labour in the whole hospitality industry mentioned are:

- Soft skills – empathy, understanding the guests/clients, eye for customer needs
- Analytical skills, ability to critical thinking
- Knowledge of big data, data mining, ICT etc.

Source: information from interviews and interviews of former research (Telgte, Vork, & Lombarts, 2013; Vork & Lombarts, 2014).

<sup>4</sup> The Leisure & recreation industry embraces a very broad spectrum of activities and companies. The SCP (Social Cultural Planburo) analyses the activities and changes in the pattern of leisure & recreation activities of Dutch people. Together with the CBS (Central Buro of Statistics) they provide information on L&R. This information also contains the number of people working amongst others in cultural organisations such as museums, theatres & concert halls and sport organisations.

<sup>5</sup> Both ANWB and VVV are associations for travellers and tourists; amongst others they are providing services and information.

## **2.0 THE TOURISM EDUCATION AND TRAINING SYSTEM**

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### **2.1 Overview of the national education and training system**

**This section will be provided by CSES.**

### **2.2 Planning of tourism education and training**

The planning of hospitality education and training is done at various levels and with various forums.

'Gastvrij Nederland' is the National Council for tourism, recreation, hotel & catering, and leisure industry. The most important hospitality organisations are member of this council (for a list see annex B). The council published a 'sector or industry vision' in which it emphasizes the importance of the industry for the labour market. It also emphasizes that the quality of the service level within the industry can still be improved. There is a need for a future-proof labour market and education policy especially in the light of the forthcoming rejuvenation and ageing of this labour market. It furthermore states that although the industry pays a lot of time and energy in the collaboration with education institutes, the various (levels of) education still lack a satisfactorily connection with the industry/labour market (Nederland & Nationale Raad toerisme, 2011). In the consecutive report (Gastvrijheidseconomie, 2014) the executive board of this Council published the need for a Human Capital agenda focussing on life long learning in the industry. The planning for 2015 foresees the set up of such a program (personal communication with one of the Topteam members). The Centre of Expertise Tourism & Leisure will be in the lead of this program. Other participating stakeholders are:

- Education institutes at middle and higher vocational level (MBO and HBO)
- Industry associations
- Employers
- Employees
- Trade unions

Whereas the 'Gastvrij Nederland' covers the whole Dutch hospitality sector, the cluster Tourism and Conventions of the Amsterdam Economic Board published a Human Capital Agenda for the hospitality industry in the so-called Amsterdam metropolis (Great Amsterdam region) (Amsterdam Economic Board Cluster T&C, 2012). In close collaboration with representatives of the industry, local industry associations and education institutes the needs and urgencies with regards to the labour market and education policies were inventoried and recommendations were done.

In sum: the national level forecasting, strategic planning, dialogue mechanisms and performance assessment procedures are being set up. At the local level, with Amsterdam in the lead, a human capital agenda has been made and its action points are being executed.

### **2.3 Role of tourism employers and other stakeholders**

The main industry associations are important partners for the education institutes when discussing needs and wishes of (future) professionals for employers and labour market. The industry associations are representing the industry and its companies.

Each sector (hotel & catering, travel & tourism, and leisure & recreation) has formulated vocational competence profiles for its sector. A vocational competence profile describes the tasks and roles of a function and the knowledge and experience one needs to be able

to execute this function or job. These profiles are made in collaboration with social partners such as the trade unions and industry associations. These profiles are the basis of the vocational education competence profiles in which the start qualifications of future professionals are defined (see chapter 3).

#### Hotel & Catering industry

ABF Research (2015) executed a labour market analysis commissioned by the social partners of the hotel & catering industry<sup>6</sup>. KHN and Veneca are industry associations representing the companies in the industry and the other partners are representing employees working in the industry (trade unions). The report looks into 1) the industry (size, labour market, characteristics employees etc.), and 2) the educational field (which education institutes are there specifically for the industry) It gives labour market prognoses (3): development of labour market, same per sector/type and region, dynamics of market and the connectivition of the education with the labour market.

#### Travel & tourism industry

Reiswerk is the collaboration between the association of (employer's) travel & tourism organisations (ANVR) and the employee unions (FNV, CNV, De Unie). Member of this organisation is the ANVR, the representative association for employers in this industry. It provides information of labour market policies, education and employability in the travel & tourism sector.

Its main goal is to provide the travel & tourism industry with adequately qualified employees. Reiswerk formulates strategic goals of the labour market policies hence it is involved in the forecasting and strategic planning for the travel & tourism industry. In a dashboard the progress of the different subjects can be monitored. The dashboard gives information about the needs of labour (from the perspective from employers) and the offer of employment (from within and outside the industry as well as from the perspective of graduates)

Linked to the Strategic goals are several programs in order to achieve the goals. The various programs focus on attracting students, potential employees as well actual employees as ex- employees to start, stay or come back to work in the tourism sector.

#### Leisure & recreation

In the Dutch recreation sector the association SFRecreation represents the branches 'accommodation hospitality' (camping's, bungalow parks and group accommodations) and swimming pools. The board of the association exists of representatives of Recron (the industry association representing the employers) and of employees (represented by the trade union FNV Recreation, CNV and Abvakabo FNV). The association has 1600 company-members employing 31.000 employees during high season. Main goals are:

- \* Education & development;
- \* Labour market & labour conditions

Next to that the Atrium Group executed a research for the branches 'accommodation hospitality/contract catering and the water sport industry. For all of these three (sub)sectors they made an inventory of the needs and wishes of employers and employees working in these sectors as well as the future developments and expectations. For all three sectors the social partners were involved at the research (industry and trade associations). (Atrium, 2014).

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<sup>6</sup> The social partners are Koninklijke Horeca Nederland (KHN), Veneca, FNV Horecabond and CNV Vakmensen.

At the vocational level (both levels, higher and middle) the hospitality industry cooperates with the education institutes by offering trainee- and internships varying from 4 days a week throughout the year at the BBL level (see 3.2.1) to several weeks (average 10 weeks) at the third/fourth year at the universities of applied sciences.

Practical learning or learning on the job is an important aspect of vocational studies at the MBO level. The traineeships or apprenticeships have to be followed at recognized training companies. The organization 'Kenwerk' is the knowledge centre of the vocational education of the work field for the sectors Hotel & Catering, Travel & Tourism, Leisure & Recreation and Facility Services. Its role is to assure that the various sectors obtain qualified employees and that young people have a fair chance on the labour market to obtain a job (see also 3.2). Kenwerk manages the register of recognized training companies.

At the HBO level, education institutes and students are responsible to provide their own traineeships.

The various industry associations either provide trainings in their sector themselves or collaborate with other specialised organizations providing trainings, in-house or extern. Next to that, a lot of companies work together with the various education institutes; they provide traineeships or have students doing research for their thesis in their organization.

#### Best practices

Some companies even go further. A few examples are given hereunder.

Vacance Soleil the biggest supplier of luxury camping holidays in Europe has a special Vacansoleil Leisure Academy. This organisation collaborates with four ROC's in the Netherlands. They offer various programs on the level MBO 2, 3 and 4. They train the future professionals to become an all round hotel & catering employee or a front office employee or manager. Duration of the course: 3 years with traineeships included.

Another example is the Arkefly Academy. Arke collaborates with the ROC of Amsterdam to educate students to become steward or stewardess, to work in security, logistics, and/or facility management

To ROC of Amsterdam (hotel & catering) also works together with the College hotel, a five star hotel where students learn the ins and outs of luxury hotel business. Similar examples exist for example the Cas Spijkers academy in Twente. This famous chef cook was the first to introduce top level cooking at a greater public.

Apart from these best practices, there are a lot of initiatives to involve students in special projects such as the renowned Sail event; the organisation of Sail collaborates with MBO and HBO education institutes and students during the event.

Another example was the involvement of HBO students of the Hotel Management School The Hague during the WK Hockey in 2014 in The Hague.

## 3.0 MAIN FORMS OF PROVISION

Hereunder the different types of education and training are indicated by their Dutch abbreviation. In the lexicon you may find the English name and explication (Annex B).

### 3.1 Higher education

The Dutch system for higher education knows two different types i.e. the HBO and WO. HBO stands for the higher vocational education, WO for scientific education or university. Internationally and slowly but surely also in the Netherlands, HBO education institutes are better known as universities of Applied Science. We will use the abbreviation HBO throughout this report.

As a result of the Bologna treaty of 1999, the so-called BAMA structure (bachelor-master structure) system is applied since 2002. HBO-students are undergraduate-students. After accomplishing the four-year HBO program, they receive the international recognized title Bachelor or 'B.' Former Dutch titles such as 'ing' and 'bc.' are also still being used. WO-students are graduate-students and they receive the title Master or 'M' after finishing their studies.

Table 3.1.1 HBO/WO students in hospitality industry

Type	2013-2014	%
Hotel & catering industry	6.815	31%
Tourism	5.664	26%
Leisure & recreation	9.235	43%
Total hospitality industry	21.714	
Total HBO/WO students	698.247	3% of all HBO/WO students in hospitality industry

Sources: Kences, 2015; ABF Research, 2015; HBO start, 2015; VSNU, 2015

Whereas the HBO-level offers specific hospitality studies, the WO-system does not or just a few (three). The NHTV in Breda offers for instance a master of leisure studies in collaboration with the Tilburg University. Wageningen offers Master Leisure, Tourism and Environment. The Erasmus University in Rotterdam offers in cooperation with the Hotel Management School The Hague a Professional Master in Hospitality Management (for a complete overview of specific Masters in Hospitality see Annex B).

Other Dutch universities offer subjects that may be applied within the hospitality industry such as arts history, heritage studies, architecture or more generic studies such as IT or Finance. The various disciplines providing subjects to potential hospitality employees are to be found among several departments and/or universities. Because this spectrum is too broad, it is not included in this study.

At the HBO level, the main subjects forming the basis of all HBO hospitality education competence profiles are:

- Accounting
- Business Law ethics
- Economics
- Quantitative techniques
- Finance Management Information systems

- Marketing
- Organizational behavior
- Strategic Management

Source: LOLTM, 2013, 2014; Bernasco, 2011

Students should be able to fulfil the roles and functions hereunder with the theoretical knowledge obtained of these subjects.

The vocational education or competence profile of the five Hotel Management Education institutes<sup>7</sup> is on the basis of the abovementioned subjects. They made one vocational education profile for all five institutes. The areas of expertise are a selection from the general management areas such as organization theory, marketing, HRM, business administration, financial management, communication, foreign languages.

The Hotel Management professional operates as an independent entrepreneur or as part of an enterprise, in partnership with hospitality entrepreneurs and organisations, in so-called junctions of booking/transport/accommodation/ location/ entertainment/ leisure/conference, fair and event locations/restaurants/food services:

- Accommodation: business and leisure accommodation, for example hotels, holiday parks, cruise ships, campsites, spa's & wellness centres, conference rooms & halls, fairs and congress centres, open air venues, health care accommodations;
- Restaurants, cafés, clubs, fast service, catering;
- Entertainment and leisure, theme and amusement parks, theatres, museums, events industry;
- Intermediary organisations: online travel agencies and tour operators;
- Tourism agencies, industry organisations;
- Transport and mobility: bicycle, car, taxi, bus, train, plane, boat;
- Nature and the public space.

Table 3.1.2 Hotel & Catering Industry (Hotel Management studies)

Typical functions or occupations in the hotel & catering industry:

Restaurant manager  
 Reception manager  
 Manager of conference organiser  
 Event manager  
 Manager in de financial sector  
 General manager  
 Food & Beverage manager  
 Rooms Division manager  
 Marketing manager  
 Banqueting manager  
 Sales manager

Source: Bernasco, 2011

Six universities of applied sciences have combined forces and formed a special cooperative body (LOLTM)<sup>8</sup> to develop a vocational education or competence profile for both Tourism and Leisure education institutes.

<sup>7</sup> Zuyd Hogeschool, Stenden, Hotelschool The Hague, NHTV, Saxion Hogeschool

<sup>8</sup> These six universities are: NHTV, Stenden, Saxion, Inholland, HZ and Tio. They are the main providers of Tourism and Leisure education. The last two, HZ and Tio did not participate yet in the collaboration when the Leisure profile was made.

Table 3.1.3 Tourism studies (HTRO)

Start functions or occupations in the tourism industry (junior):	Start functions or occupations in the tourism industry (junior):
Coordinator	Coordinator
PR-employee	Policy advisor
Employee planning	Product manager
Coordinator Reservations	Office manager
Product manager (assistant)	Retail and/or region manager
Marketing & communication employee	Area and/or Region manager
Account manager	Call center/contact center manager
Employee logistics	E-Commerce Manager
(Assistant) Contract Manager	Team manager
Aftersales employee	Project manager
Coordinating employee	Process manager
Manager: depending of the organization: Office-Unit-, Team-, Store-, Location-, etc.	Manager
Front office manager	Contract manager
Travel consultant	Marketing manager
Travel planner / coordinator	Manager operations
Marketing & communication employee	Yield manager
Supervisor	Manager public relations / communications
Product manager	Trainer / coach
Leisure & hospitality executive	Advisor/consultant
Junior policy employee	Concept developer
Junior market researcher	Independent entrepreneur
	Franchisee
	Business unit manager
	Business travel consult

Source: LOLTM, 2014

Table 3.1.3 Leisure & recreation (Leisure Management)

Start functions or occupations in the leisure & recreation industry (junior):	Advanced functions or occupations (senior, specialist, expert):
Production assistant	Concept- and product developer
(Assistant) project employee	Project leader
(Assistant) event coordinator	Director own company/enterprise
(Assistant) account manager	Consultant
(Starting) independent entrepreneur	Policy advisor
Junior/trainee policy officer	Market researcher
Junior/trainee market researcher	General manager
Junior/trainee marketer	Sales manager
Junior product manager	Sales manager
Marketing assistant	Product manager
Communication employee	Marketing manager
	Communication advisor

Source: LOLTM, 2013

Industry partners have advised the education institutes for all three vocational competence profiles; representatives of the most important industry associations and key

figures of the corporate industry participated. Furthermore, teachers from the industry have been participating in the development of these profiles. Additional information was received from international partners and partner universities abroad.

Traineeships are an important aspect of studies at HBO level. During the third year all students have a traineeship of half a year to 10 months. During the final year, all students are obliged to write a thesis with research questions deriving from the sector.

The organisation 'DUO' registers and publishes the information of the institutes in the CROHO (Central register Higher Education)(DUO, 2015).

The quality control mechanism is executed by the NVAO (Dutch Flemish accreditation organisation). The accreditation is the quality check that expresses the quality of the education. The accreditation is done among bachelor- and master education (courses with minimum duration of one year).

There are 3 steps in the accreditation process:

- 1) Critical self evaluation:
  - a. What are the goals of the education? (Targeted final qualifications)
  - b. How are these realized? (Education context and environment)
  - c. Are the final qualifications achieved? (Checking and realized final qualifications)
- 2) Visitation to the institute done by the commission of experts; resulting in a written of the self-evaluation and the visit. Judgment in terms ;of 'excellent', 'good', 'adequate', 'inadequate'.
- 3) Visitation report

Source: NVAO & accreditatieorganisatie, 2015

### 3.2 Vocational education and training

MBO stands for intermediate vocational education or intermediate vocational training, in short vocational education. There are in total 70 education institutes at the MBO level with 3 type of institutes:

- ROC: regional education centre
- Vocational school – education specialized in one sector f.i. maritime industry
- AOC: agricultural education centre

The ROC is the type of institute offering the education in the Hospitality industry.

Table 3.2.1 Types of education at vocational level

Type of education	ROC's offering the type
Hotel & catering	41
Travel & tourism	32
Leisure & recreation	38

MBO offers educational programs at 4 levels:

- Level 1: assistant education for simple executive (1 year)
- Level 2: basic vocational education for executive practical work (1 to 2 years)
- Level 3: vocational education to become independent professional independent executive work, broad functionality/scope (2 to 3 years)
- Level 4: middle management (3 to 4 years), specialist education (one extra year on top of prior study), entirely independent executive work, broad functionality/scope

or specialism

There are 2 educational formats:

1. BBL (Professional accompanying program)
2. BOL (Professional training program)

The BBL-program offers a 20-hour employment at a company or organization plus a day education per week at the education institute. The BBL-student has no study finance in whatever form. The theoretical education part is restricted, the practical education part, practice, is done at an approved work training company.

The BOL-program offers 4 to 5 day education per week at the education institute. The BOL-student can get study finance when 18 years or older. This form of education contains quite some theory and home study. Students follow one or more traineeships of 4 to 5 fulltime working days.

The last ten years the student numbers for the Hotel & Catering Industry linger around the 25.000, and the number of students in the sectors Tourism and Leisure are approximately an additional 10.000.

Table 3.2.2 MBO students in Hospitality Industry 2013-2014

Type	Students per type	% of total hospitality students at MBO level
Hotel & catering industry	21.383	64%
Tourism	3.033	9%
Leisure & recreation	9.102	27%
Total MBO students hospitality industry	33.518	7% of total MBO students
Total MBO students	495.215	

Source: Kenwerk; 2015 based on DUO, 2014

### Hotel & Catering

Table 3.2.3 Number of MBO students by qualification, level and pathway, 2013

Hotel & Catering industry	BBL	BOL	Total
<b>Level 1</b>			
Hospitality industry assistant	294	566	859
<b>Level 2</b>			
Host	878	1.280	2.158

Cook	2.069	2.483	4.552
Employee fast service	552	62	614
<b>Level 3</b>			
Bartender	<10	<10	<10
Independent working host	683	298	981
Independent working cook	2.474	921	3.395
1ste employee fast service	384	17	401
<b>Level 4</b>			
Manager fast service	133	<10	136
Gastronome/sommelier	21		21
Specialised cook	243	<10	251
Manager service	280	118	398
Manager Kitchen	114	92	206
Manager/owner pub/bar	114	330	444
Manager/owner fast service	24	<10	25
Manager/owner hotel/restaurant	59	6.878	6.937
Total	8.324	13.059	21.383
<b>% of total</b>	<b>38.9</b>	<b>61.1</b>	<b>100</b>

Source: Kenwerk; 2015 based on DUO, 2014

### Travel & Tourism

Table 3.2.4 Number of MBO students by qualification, level and pathway, 2013

Travel & tourism	BBL	BOL	Total
<b>Level 3</b>			
Sales Representative Travel	<15	1.346	1.358

<b>Level 4</b>			
Sales Manager Travel	<10	1.674	1.675
Total	13	3.020	3.033
<b>% of total</b>		<b>100</b>	<b>100</b>

Source: Kenwerk; 2015 based on DUO, 2014

### Leisure & Recreation

Table 3.2.5 Number of MBO students by qualification, level and pathway, 2013

Leisure & recreation	BBL	BOL	Total
<b>Level 2</b>			
Leisure & hospitality assistant	24	1.129	1.153
Employee water-sport industry	<10	11	<21
<b>Level 3</b>			
Information officer		105	105
Receptionist	27	691	718
Front office employee level 3		309	309
Leisure & hospitality host	24	1.678	1.702
All round employee water sport industry	<10	35	<45
<b>Level 4</b>			
Front office manager	<10	1.430	1440
Front office employee level 4		612	612
Manager information		80	80
Leisure & hospitality executive	15	2.901	2916

Executive water sport industry		12	12
Total	109	8.993	9.102
<b>% of total</b>	<b>1.2</b>	<b>98.8</b>	<b>100</b>

Source: Kenwerk; 2015 based on DUO, 2014

The organization 'Kenwerk' is the knowledge centre of the vocational education institutes of the work field for the sectors Hotel & Catering, Travel & Tourism, Leisure & Recreation and Facility Services. Its role is to assure that the various sectors obtain qualified employees and that young people have a fair chance on the labour market to obtain a job.

What they do amongst others:

- Recognizing, coaching and advising training companies to enable them to educate and train students
- Translating labour market developments to educational programs
- Offering expertise in the field of qualification and examination
- Stimulating regional consultation between MBO's (ROC's) and training companies
- Executing projects to improve the connection between the labour markets and its companies and the educational institutes.

Kenwerk supports the joint commissions of the various sectors to develop qualification dossiers that connect the developments of the labour market, the needs and wishes of the business and the requirements of the Ministry of Education, Culture and Science. The joint commissions exist of 50% representative of the social partners i.e. representatives of employers and trade unions at the one side, and 50% of vocational education and training institutes.

Practical learning or learning on the job is an important aspect of vocational studies at the MBO level. The traineeships or apprenticeships have to be followed at recognized training companies. Kenwerk manages the register of recognized training companies.

Table 3.2.6 number of recognized training companies for MBO

	The Netherlands	Abroad
Hotel & Catering Industry	11.491	1.195
Travel & Tourism	1.330	55
Leisure & Recreation	1.948	720

Table 3.2.7 Recognized training companies per education type and qualification

Hotel & Catering Industry	Number of recognized training companies
<b>Level 1</b>	
Hospitality industry assistant	5.515
<b>Level 2</b>	
Host	4.794
Employee fast service	2.125

Cook	7.202
<b>Level 3</b>	
Bartender	101
Independent working host	2.935
Independent working cook	4.917
1ste employee fast service	1.731
<b>Level 4</b>	
Manager fast service	1.180
Gastronome/sommelier	88
Specialised cook	509
Manager service	911
Manager Kitchen	873
Manager/owner pub/bar	808
Manager/owner fast service	388
Manager/owner hotel/restaurant	3.036

Source: Kenwerk; 2015 based on DUO, 2014

Table 3.2.8 Recognized training companies per education type and qualification

Travel & Tourism	Number of recognized training companies
<b>Level 3</b>	
Sales Representative Travel	1.317
<b>Level 4</b>	
Sales Manager Travel	1.205

Source: Kenwerk; 2015 based on DUO, 2014

Table 3.2.9 Number of MBO students by qualification, level and pathway, 2013

Leisure & Recreation	Number of recognized training companies
<b>Level 2</b>	
Leisure & hospitality assistant	1.170
Employee watersport industry	159

<b>Level 3</b>	
Information officer	681
Receptionist	1.139
Leisure & hospitality host	1.418
Allround employee watersport industry	165
<b>Level 4</b>	
Front officemanager	974
Manager information	500
Leisure & hospitality executive	1.363
Executive watersport industry	37

Source: Kenwerk; 2015 based on DUO, 2014

The MBO institutes have also quality checks.

The quality control mechanism is executed by the education inspection.

'Examenwerk' develops, maintains en coordinates evaluation- and exam-instruments for vocational education institutes in the hospitality industry. These instruments are developed in close collaboration with the industry and the education institutes and correspond with the requirements of the Ministry of Education and the inspection of Education.

Analogous to the NVAO, 38 MBO institutes have recently combined forces and started with 'Kwaliteitsnetwerk mbo', a joint network to improve the quality assurance of the MBO institutes. It wants to take the responsibility for the quality checks similar to the NVAO.

The assessment framework looks at 5 critical aspects/questions:

- 1) What is the viewpoint of the institute of the quality of the education it offers
- 2) How is this viewpoint realized?
- 3) How does the institute measure if the viewpoint is realized?
- 4) How does the institute implement and realize improvements?
- 5) Who is responsible for this?

Source: Hobeon, 2015

### **3.3 Adult education and training / lifelong training**

The ROC's (see above 3.2) provide adult education in the Netherlands, VAVO (continued general education for adults). It offers early school leavers or adults (18 years and older) the possibility to obtain a diploma (vocational education).

WO and in particular HBO education offer part time studies and/or evening studies. In the HBO the offer exists of 1 study in hotel & catering industry, 4 leisure & recreation studies and 1 tourism study (Millian, 2015).

Apart from the education institutes, the main industry organizations<sup>9</sup> offer training and courses. Most of the time they have partners with whom they collaborate (see 2.3). These workshops or master classes cover a big variety of subjects.

### **3.4 School education**

High school or Secondary school as it is known in the Netherlands offer no specific subjects related to the hospitality industry. The education system preparing for the higher education i.e. scientific (= VWO – preparatory scientific education) of higher vocational education (= HAVO – higher general continued education) has 4 main streams:

1. Culture & society
2. Nature & health
3. Economy & society
4. Nature & technology

With each of these preparatory educational systems or directions the entrance to all hospitality studies is guaranteed when looked upon the basic entrance criteria. The streams Culture & society and Economy & Society are the more obvious ones when studying hospitality-focused studies.

The education preparing for the vocational education (MBO) is the VMBO. There are 4 pathways:

1. VMBO basic
2. VMBO 'kader'
3. VMBO mixed pathway
4. VMBO theoretical

40% of the VMBO students follows the theoretical pathway. Each pathway within the VMBO has 10 profiles. Most students going to the vocational level of the hospitality industry education (3.2) have followed the profiles:

1. Economy and entrepreneurship (E&O)
2. Hospitality, Bakery and Recreation (HBR)
3. Health & Care (Z&W)

### **3.5 Other work-based learning**

There are several providers of courses, master classes, trainings, and in company training in the hospitality industry. A few of these providers offer a wide range of courses and trainings.

There are providers focussing specifically on the hotel & catering industry such as the 'Algemene Stichting Horeca Onderwijs (SHO)', and there are other providers offering education within the hospitality industry.

SHO is one of the main providers of education for the hotel & catering industry with courses throughout the Netherlands. The courses or trainings differ from one-day or evening sessions to several days.

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<sup>9</sup> Being for the hotel & catering Industry: KHN, for the travel & tourism industry: ANVR and for the leisure & recreation industry Recron & Hiswa.

Next to this specialised institute there are various corporate institutes offering courses to the hotel & catering industry. These courses vary from waiting & serving to cooking, working at the reception desk to safety at work (both in-house emergency or first-aid assistance courses to recognizing fraud or security trainings).

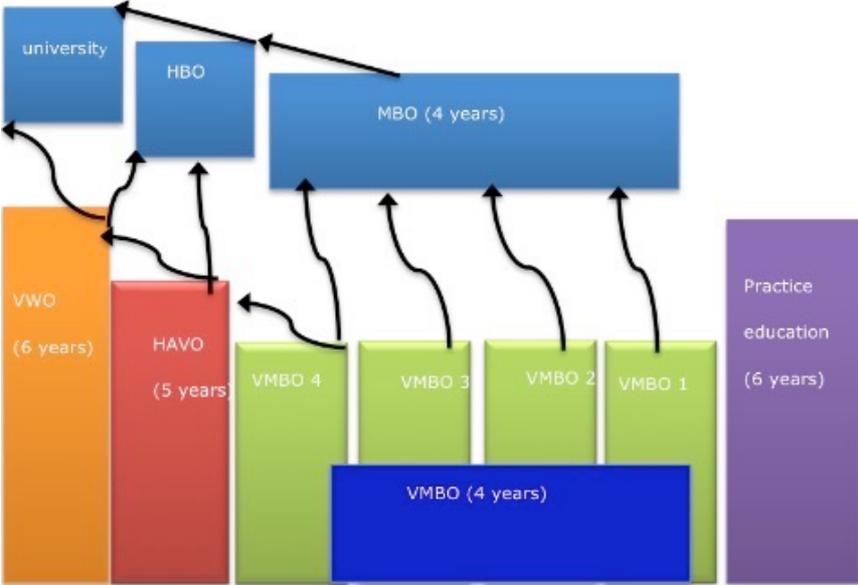
The number of courses in the hotel & catering industry is by far the biggest, but also courses in event management are popular as well as courses in tourism & leisure. Due to the nature of the courses it is not useful to give the figures of the available courses: the majority is given by private companies and will only proceed if a minimum of registration is reached<sup>10</sup>.

- Courses offered:
- Length: 1 day to two weeks
- Location: training location, in-company and/or tailor-made, or at home (e-learning)
- Rates: 0 - 500 euro
- 500 - 1000 euro
- 1000 - 2000 euro
- > 2000 euro

### 3.6 General

Nature of progression routes  
 After high school or secondary education there is a variety of progression routes to the next level of education. As there is more than one possibility, the scheme hereunder specifies the different options.

Figure 1 progression routes



<sup>10</sup> See attachment x: list of the most important companies offering courses and trainings in hospitality industry

## 4.0 ANALYSIS OF OCCUPATIONS

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Compared to professions in medicine or law, it is in general not mandatory to have a specific or vocational education in the hospitality industry (hotel & catering, tourism or leisure) when entering the labour market in the Netherlands<sup>11</sup>. However, most employers in the hospitality industry have a preference for people with a background in hospitality studies. Moreover it is quite remarkable that the requested levels of education vary enormously, from the lowest i.e. no specific education to scientific education and every level in between. What it makes remarkable is the fact that for the similar occupations or job titles the differences in educational background differs. It is rather difficult to distinguish why these differences occur or what the reasons for these variances are.

Employees with a HBO or WO education perform 10% of the jobs within the hospitality industry. 45% of the jobs within the hospitality industry are executed by employees with a low educational level (first level MBO or comparable), 40% by employees with an average educational level (MBO level 2-4 or comparable).

For one thing, it is a trend that employers put a strong emphasis on soft skills, as there is an abundance of students/future professionals with a background in hospitality studies. Amongst the soft skills requirements are the following, which are the most often mentioned in the job vacancies studied:

- Result-driven, pro-active, decisive
- Empathic, hands-on
- Team player
- No 9-to-5 mentality
- Solution-driven, flexible
- Presentable
- Networker
- Communicative skills
- Analytical skills
- Entrepreneurial spirit

Simultaneously, these soft skills are also the skills, which are most often mentioned to be lacked by students and trainees entering the labour market. (See chapter 5). It is also remarkable to learn how many organizations are looking for trainees especially in the hotel & catering industry.

### 4.1 Commercial managers

Commercial managers in the hospitality industry are requested to have a higher vocational education (HBO) and depending on the importance of the job, tasks, and responsibilities a work experience of 2-5 years is demanded. Hotel management, HTRO or an education in commercial economy is most often requested although not a decisive condition. Also people with an MBO background as well as WO background are requested. For specific occupations such as revenue, yield or pricing manager user knowledge of computer systems is required.

Remarkable is the emphasis on soft skills, which seem to be more important than the 'hard' skills, acquired at school or university.

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<sup>11</sup> To obtain a good overview of the requirements for the different occupations, various job boards have been visited such as Indeed.nl, monsterboard.nl, trovit.nl as well as the various websites of organisations in specific sectors of the hospitality industry.

## **4.2 Accommodation management**

For the group of occupational functions the same requirements as above at 4.1 are requested (hard & soft skills).

Extra requirements are knowledge about health and food safety (diplomas as HACCP, which may be acquired via the training companies mentioned under 3.5.)

## **4.2 Accommodation operatives**

For this group of occupations the requirements differ from a finished high school level (HAVO/VWO) to MBO to HBO or no specific educational background. Again, soft skills seem to be more important.

## **4.3 Management of meetings, incentives, conferences, and exhibitions management**

Occupations in this group are at the level of HBO or MBO-4.

## **4.4 Destination management**

The vacancies in destination management differ greatly in required education and background. The big cities such as Amsterdam, Rotterdam, The Hague and Eindhoven look for HBO educated staff or even WO- educated staff when it concerns managerial functions. Smaller cities or villages running a tourist office require staff at MBO level.

Again, it is quite remarkable how many trainees are asked to apply for traineeships especially at the tourist (information) offices.

## **4.5 Tour operators**

For the occupations in this group mostly a higher vocational (HBO) or even a university educational level is requested. Especially when it concerns the managerial jobs, or the negotiator and product manager. People with a MBO education fulfil the Tour/Holiday representative jobs.

## **4.6 Travel agencies**

Also for the occupations in this group mostly a higher vocational (HBO) or even a university educational level is requested. People with a MBO diploma fulfil the advisory or consultant jobs. For these jobs sometimes a SEPR diploma is requested (this diploma used to be one of the subject of MBO education. At this moment it is not sure whether the courses to obtain the diploma will be continued or stopped; this due to the changes in the travel world such as Internet bookings).

## **4.7 Cultural, sports and recreational activities**

For each of these activities, different education is asked.

For instance in the cultural sector, in the museum world an education in Arts and Culture such as Art Studies, Dutch Art, Art History, or Archeology (Landscape and Heritage, Mediterranean Archeology or comparable) is required. In the Performing Arts backgrounds in Musicology, Dramaturgy or Theatre Studies are welcomed. And most of

the time, depending the level of the vacancy, also work experience in the cultural sector is required.

Due to the cuts in governmental subsidies, a lot of the organizations in the cultural sector struggle with financial problems and try to survive. In this sector, again, a lot of internships are available. Even graduated students with a WO diploma are supposed to work 1 or 2 years for almost no stipendium in order to gain work experience.

In the sport sector, jobs are available on all levels, MBO, HBO and WO depending on the difficulty and tasks and responsibilities of the job. Jobs requiring a MBO diploma are mainly focussing on instructing or guiding at sport activities (education: MBO sport & health, sport & safety). At the managerial levels a background in Sport management, Sport & Health Management, Sport Economy and Communication either with HBO or WO diploma is required.

For occupations in the leisure sector with recreational activities mostly a HBO or MBO-4 level background is requested.

#### **4.8 Tourism education, research journalism and consulting**

Faculties at hospitality education institutes (MBO and HBO) still have quite some teaching staff with a background in the hospitality industry. Till 2008 (the financial crises), it was rather difficult to find teaching staff for hospitality education with teaching qualifications and/or a master degree and work experience in the hospitality industry. Besides, there were enough work possibilities within the industry with interesting perspectives (financially and career-wise) and still there were only a limited number of graduates with a master degree (tourism, leisure or hotel management) as the number of hospitality masters was (and still is) limited. Both MBO and HBO institutes were forced to accept people from the 'industry' without pedagogic and didactic qualifications. As a consequence, a lot of faculty members lacked a master degree and specific teaching qualifications.

Actually, there is a shift, catching up, going on in the hospitality education, or at universities of applied sciences (HBO) in general, aiming to have the majority of their teachers graduated with a Master diploma (80% or more). The in hospitality education specialised universities of applied sciences such as the Hotel Management School The Hague and NHTV are already succeeding or even exceeding in achieving this percentage. They also strive to have PhD's among their staff. A PhD is obligatory for assistant or associate professors at the so-called knowledge centres of the HBO institutes. At the WO level education a PhD is always mandatory. However, the education of 'hospitality' masters at WO level is still rather limited (see 3.1).

The faculty of MBO institutes is required to obtain a HBO diploma and/or sometimes a master.

For the occupations researcher, consultant and journalist/writer again the required education level differs greatly. At the renowned organizations one see that more and more (new) staff members are required to have a master degree (social sciences, arts & culture, health & sports etc.). People already working in consultancy or as a writer fulfilling these jobs already for years often do not have a HBO or WO diploma.

## 5.0 SKILLS & COMPETENCES

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### 5.1 Gaps in Provision

Thanks to the developments in the global world hence in the hospitality industry, 'old' jobs or occupations will disappear, new ones will occur. Next to these developments more specific changes in a European or Dutch context are important for the hospitality industry. Focussing on the Dutch hospitality, some factors drive the requirements for new skills and competences:

- 1) New technologies thanks to computerization and digitalization  
Influencing booking/reservation behaviour, customer/client information such as customer journey, client satisfaction, yield and revenue management etc.  
Skills and knowledge needed: ICT and digital skills and competences in field of data-mining, big data, econometrics, logarithm, social media.
- 2) Changing needs and wishes of consumers  
Other patterns in work/leisure time, other spending habits, need for measure- or tailor-made products/services, new experiences  
Skills and knowledge needed: better understanding of psychological and social behavioral sciences
- 3) Ageing population and other social issues (ecology, corporate social responsibility)  
(Dutch) people become older and stay healthier, have more spare time and money to spend at leisure.  
Skills and knowledge needed: empathy, awareness of needs/wishes of elderly people, ability to translate social issues to new, profitable hospitality concepts.
- 4) Internationalization  
Greater acces to tourism i.e. (Dutch) people travelling abroad to recently accesible or reacesible areas such as Ethiopia and Myanmar, etc. and others having more possibilities for travelling to Europe and The Netherlands thanks to discretionary time/money such as tourists from BRIC countries.  
Skills and knowledge needed: cultural and/or antropological knowledge, language knowledge, code of conduct knowledge etc.
- 5) Need for innovations  
Sustainibility and ecological awareness and behaviour are becoming more important as 'natural' or fossil fuels are running out. And thanks to the sharing economy, a neo-liberal world in which governments become facilitators and public-private partnerships are more and more important, a world in which experiences make the difference, there is a need for new business models. Multi-disciplinary and cross-disciplinary research/collaboration are essential and drivers of disruptive innovations.  
Skills and knowledge needed: analytical thinking, eagerness to learn, out-of-(personal-)boundary thinking, collaborative behaviour (no thinking in competition but in collaboration), entrepreneurial competences.
- 6) Soft-skills!!!  
In a world where velocity is key, and where experiences are the making the difference the need to connect is vital  
Soft skills such as empathy, contextual thinking, adaptation, flexibility, code of conduct etc. are the most often mentioned skills for people entering and those who want to be successful in the hospitality industry.

## 5.2 Addressing new skills and competences requirements

The most important skills/competences that need to be addressed at this moment are the soft skills. Without any exception everyone interviewed emphasizes the importance of soft skills<sup>12</sup>. The soft skills are needed at all levels and need to be trained at the vocational education institutes as well as on-the-job or during short courses.

Although the need for soft skills is frequently emphasized, the vocational institutes seem slowly respond to this. The Hotel Management Schools, in particular the one in The Hague being the exception on the rule with a specific hospitality course in their program.

Good practices are the city hospitality teams in Amsterdam and The Hague. During the summer/tourist season and during big events, 'welcome teams' welcome tourists in the city, give them information and tips how to get around in the city.

In 2014 The Hague started a new initiative 'the House of Hospitality'

(<http://houseofhospitality.co>) a collaboration of the city of The Hague, the tourist office, and the hospitality industry and the Hotel Management School to become the most hospitable city of The Netherlands. The collaborating partners exchange information and knowledge in order to improve the city's hospitality. Next to that, 300 volunteers work at the 'Embassy of The Hague' (<http://www.ambassadevandenhaag.nl/home/>) to welcome visitors to the city.

As regards skills for new technologies, the interviewees state that for very specialised functions or skills such as data-mining specialists, econometrists etc. they look for highly educated people with a university background. The same counts for employees with a legal background and even for those with financial or marketing background. The more professional companies employ more and more often highly specialised employees with a university background. The interviewees think that graduates from universities of applied sciences (HBO) with a bachelor diploma lack the ability to obtain a similar level of abstraction as graduates from universities with a master diploma.

The graduates of universities of applied sciences do, however, need to understand what these specialists with a WO diploma are doing in order to use the information they produce. Actually, these students also this level of understanding and are not prepared to analyse the information they are provided with. Therefore analytical and research skills need to be improved. Although most HBO institutes have set up research centres and research is becoming more important in their curricula, a lot of progression can be made.

Apparently contradicting with the above, simultaneously the hospitality industry becomes less interesting for highly educated professionals whereas it is an attractive industry for low qualified employees. Due to the need to restrict cost in order to stay profitable, especially at management levels jobs will disappear. As the low qualified jobs cannot be outsourced or automated, the highly educated professionals will take over the jobs of the low qualified employees and therewith repulse the job opportunities for this category.

Although the education institutes work already with the various organizations within the hospitality industry, the cooperation with the industry needs to be intensified. The industry would also appreciate it if the teaching staff would have more knowledge of the industry or the specific organisation (Telgte, I., Vork, J., & Lombarts, A.; 2013).

All of the above make that 'life long learning' is becoming essential also in the hospitality industry. There is a need for an intensive relationship or partnership between the education and training institutes and the labour market to assure the matching of education and training with the daily and quickly changing practice.

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<sup>12</sup> Dutch people are known for their entrepreneurial attitude and language knowledge, but frequently also for their discourtesy and little hospitable behaviour.

## 6.0 PERFORMANCE OF THE SYSTEM

### 6.1 Learning outcomes

Whereas statistics of the vacancies per function group at the MBO level can be easily retrieved, this is not the case for the HBO level. However, it is known that 48% of HBO students work under their educational level (Verkenningcommissie hoger economisch onderwijs; 2014). Comparable to the competition MBO students encounter from HBO students, the latter experience concurrence of university graduates obtaining a master. Moreover, due to the fact that in the near future it is expected that the need for managerial jobs will decrease the HBO level will be under pressure and there will be less interest in high-qualified employees unless they are experts and specialized in certain areas such as technology, law or finance, preferably with a master qualification.

Table 6.1.1. Vacancies in Hotel & Catering Industry

Hotel & Catering industry	Vacancies per function group (2014)
<b>MBO level</b>	
Service	17.470
Kitchen (cook)	7.867
Hotel/restaurant assistant	2.805
Fast service	6.676
Manager/entrepreneur	575
Total	35.393

Source: Jobfeed, adapted by Kenwerk (2014)

Table 6.1.2 Vacancies in Travel & Tourism Industry

Travel & Tourism industry	Vacancies per function group (2014)
<b>MBO level</b>	
Sales Representative Travel	1.223
Sales Manager Travel	31
Total	1.254

Source: Jobfeed, adapted by Kenwerk (2014)

Table 6.1.3 Vacancies in Leisure & Recreation

Leisure & recreation	Vacancies per function group (2014)
<b>MBO level</b>	

Leisure & hospitality	787
Front office	647
Employee water-sport industry	7
Total	1.401

Source: Jobfeed, adapted by Kenwerk (2014)

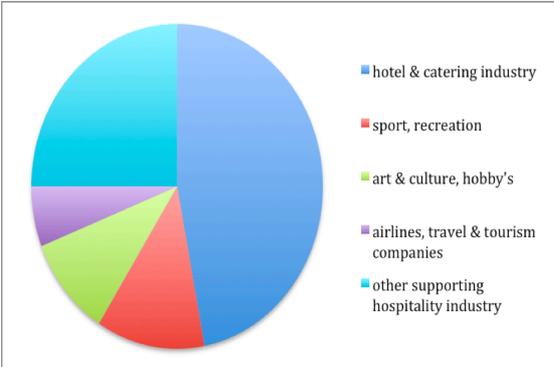
As shown in chapter 5, the employer needs are for all levels soft skills such as empathy and customer friendliness. Next to that, different levels of skills and competences are asked with regard to ICT and technology.

## 6.2 Progression into/within employment

Generally more and more people work in an occupation with a higher/scientific level and less and less people work in the middle segment (occupations on a lower/average level). The number of people on the lowest level, however, increased the last 10 years. In general the need for employees with a MBO level 1 or 2 is decreasing, whilst the need for those with level 3 and 4 is increasing. Moreover, people with HBO education and qualification are now frequently fulfilling occupations for which before the crisis a level MBO 3 or 4 was required. The percentage of HBO-students with a hospitality education Diploma (HTRO/Leisure) amounts to 48%. (Verkenningcommissie hoger economisch onderwijs; 2014). This could be due to a tight labour market but there are signs that this trend could be structural thanks to changes in demand of skills and competences.

In all sectors the share of lower educated employees decreased whereas the share of higher educated increased. In the hospitality industry the share of MBO educated was stable or increased slightly. (UWV Afdeling Arbeidsmarktinformatie; 2014). However, school leavers of vocational education institutes (MBO-level) in the hospitality industry experience competition of other school leavers; there is competition amongst those with the same education level but different types of education but also with HBO school leavers and other employment seekers. (Kenwerk; 2015).

## 7.0 SUMMARY

<b>The Supply of Tourism Education &amp; Training</b>																						
<b>Country</b>	The Netherlands																					
<b>Context</b>																						
<p>Tourism/hospitality sector is a growth market. Dutch people enjoy 2,8 holidays a year and half of them are spent abroad. Almost 13 million tourists visit the Netherlands. Most popular among all tourists is Amsterdam and its surrounding region, the North Sea resorts and among the Dutch themselves also the nature parks.</p>																						
<b>Tourism employment and skills</b>																						
<p>In 2013 the tourism sector provides 590.000 jobs, equalling 357.000 FTE's. Tourism sector provides 5.1% of total employment</p>																						
	<table border="1"> <thead> <tr> <th>Labour within tourism sector</th> <th>%</th> <th>FTE X</th> </tr> </thead> <tbody> <tr> <td>hotel &amp; catering industry</td> <td>47%</td> <td>168</td> </tr> <tr> <td>sport, recreation</td> <td>12%</td> <td>43</td> </tr> <tr> <td>art &amp; culture, hobby's</td> <td>10%</td> <td>36</td> </tr> <tr> <td>airlines, travel &amp; tourism companies</td> <td>6%</td> <td>21</td> </tr> <tr> <td>other supporting hospitality industry</td> <td>25%</td> <td>89</td> </tr> <tr> <td><b>Total</b></td> <td></td> <td><b>357</b></td> </tr> </tbody> </table>	Labour within tourism sector	%	FTE X	hotel & catering industry	47%	168	sport, recreation	12%	43	art & culture, hobby's	10%	36	airlines, travel & tourism companies	6%	21	other supporting hospitality industry	25%	89	<b>Total</b>		<b>357</b>
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<p>The hotel &amp; catering industry counts more than 45.000 companies, a number still growing, providing almost 332.000 jobs equalling 170.000 Fte's. 60% of these jobs may be found in restaurants and bars.</p> <p>The number of employees working in the travel &amp; tourism industry is 11.800 Fte. This number lowered enormously due to several (big) bankruptcies in 2013. A small growth is forecasted for 2014.</p> <p>In the accommodation recreation sector (1), there are 5.145 companies such as camping's, holiday houses &amp; youth hostels. The day/sport recreation sector counts 310 swimming pools, 795 sport accommodations, 320 outdoor sport companies and 305 attraction parks. 50% of the employees in these companies is low educated whereas a few years ago the majority had an average education level.</p> <p>In the water sport industry (2) there are 4000 companies: shipyards, marina's, sailing schools, architects, importers of motors, yachts, etc., experts, maintenance companies etc. 11.656 people worked in this sector.</p> <p>Reservation- and travel&amp; tourist information offices are part of the ANWB and VVV organisations with 1.090 offices in 2013. ANWB shops decreased from 112 to 76 shops/offices in 3 years time; the number of employees was stable with approx. 4.832 employees. The VVV had a bigger decrease in shops/offices: from 238 to 167 in 2013. They focus on digitalization of information. (Kenwerk, 2015)(Kenwerk, 2015)(Kenwerk, 2015)(Kenwerk, 2015)</p> <p>The most important skill gaps or shortages of skilled labour in the whole hospitality industry mentioned are:</p>																						

- Soft skills – empathy, understanding the guests/clients, eye for customer needs
- Analytical skills, ability to critical thinking
- Knowledge of big data, data mining, ICT etc.

### **The tourism education and training system**

'Gastvrij Nederland', the National Council for tourism, recreation, hotel & catering, and leisure industry is a partnership of the most important hospitality organisations in The Netherlands. It published a 'sector or industry vision' in which it emphasizes the importance of the industry for the labour market and in a sequel it published the need for a Human Capital agenda focussing on life long learning in the industry.

In 2015 the set up of such a program is planned with The Centre of Expertise Tourism & Leisure in the lead of this program. Participating stakeholders are education institutes at middle and higher vocational level (MBO and HBO), industry associations, employers, employees and trade unions.

The main industry associations are important partners for the education institutes when discussing needs and wishes of (future) professionals for employers and labour market. The industry associations are representing the industry and its companies.

Each sector i.e. hotel & catering, ravel & tourism, and leisure & recreation has formulated vocational competence profiles for its sector. A vocational competence profile describes the tasks and roles of a function and the knowledge and experience one needs to be able to execute this function or job. These profiles are made in collaboration with social partners such as the trade unions and industry associations. These profiles are the basis of the vocational education competence profiles in which the start qualifications of future professionals are defined.

The main providers of education in the hospitality industry are the vocational institutes i.e. MBO and HBO (the latter also known as university of applied science).

The majority of the MBO institutes have two or more types of hospitality education f.i. hotel & catering and travel & tourism.

Several HBO institutes offer bachelor education: Five of them offer hotel management and at least six HTRO (higher tourism & recreation education) and/or leisure management. The curriculum of all three types of hospitality bachelors is based on the same main subjects such as accounting, business law ethics, economics, quantitative techniques, finance, management information systems, marketing, organizational behavior, and strategic management.

Universities delivering master students are also supplier of future professionals however only three have master courses specifically geared for the hospitality industry.

MBO institutes (ROC's) offer primarily the adult education and training in the country; the HBO do offer some of the adult learning (part-time, evening studies and more and more e-learning). Next to these official by the Ministry of Education subsidized institutes, a lot of adult education & training and life long learning is offered by the employers' and industry associations whether or not in collaboration with numerous private suppliers of education and training.

### **Analysis of occupations**

Generally more and more people work in an occupation with a higher/scientific level and less and less people work in the middle segment (occupations on a lower/average level). The number of people on the lowest level, however, increased the last 10 years. In general the need for employees with a MBO level 1 or 2 is decreasing, whilst the need for those with level 3 and 4 is increasing. Moreover, people with HBO education and qualification are now frequently fulfilling occupations for which before the crisis a level MBO 3 or 4 was required. The percentage of HBO-students with a hospitality education Diploma (HTRO/Leisure) amounts to 48%. This could be due to a tight labour market but

there are signs that this trend could be structural thanks to changes in demand of skills and competences.

In all sectors the share of lower educated employees decreased whereas the share of higher educated increased. In the hospitality industry the share of MBO educated was stable or increased slightly. However, school leavers of vocational education institutes (MBO-level) in the hospitality industry experience competition of other school leavers; there is competition amongst those with the same education level but different types of education but also with HBO school leavers and other employment seekers

Compared to professions in medicine or law, it is in general not mandatory to have a specific or vocational education in the hospitality industry (hotel & catering, tourism or leisure) when entering the labour market in the Netherlands<sup>13</sup>. However, most employers in the hospitality industry have a preference for people with a background in hospitality studies. Moreover it is quite remarkable that the requested levels of education vary enormously, from the lowest i.e. no specific education to scientific education and every level in between. And even more remarkable, this is the case for jobs with the same title or with more or less the same tasks and responsibilities. It is rather difficult to distinguish why these differences occur or what the reasons for these variances are.

#### **Analysis of gaps in skill & competences**

Thanks to the developments in the global world hence in the hospitality industry, 'old' jobs or occupations will disappear, new ones will occur. Next to these developments more specific changes in a European or Dutch context are important for the hospitality industry. Focussing on the Dutch hospitality, some factors drive the requirements for new skills and competences:

- 4) New technologies thanks to computerization and digitalization  
Influencing booking/reservation behaviour, customer/client information such as customer journey, client satisfaction, yield and revenue management etc.

Skills and knowledge needed: ICT and digital skills and competences in field of data-mining, big data, econometrics, logarithm, social media,

- 5) Changing needs and wishes of consumers  
Other patterns in work/leisure time, other spending habits, need for measure or tailor made products/services, new experiences

Skills and knowledge needed: better understanding of psychological and social behavioral sciences

- 6) Ageing population and other social issues (ecology, corporate social responsibility) (Dutch) people become older and stay healthier, have more spare time and money to spend in hospitality industry.

Skills and knowledge needed: empathy, awareness of needs/wishes of elderly people,

<sup>13</sup> To obtain a good overview of the requirements for the different occupations, various job boards have been visited such as Indeed.nl, monsterboard.nl, trovit.nl as well as the various websites of organisations in specific sectors of the hospitality industry.

ability to translate social issues to new, profitable hospitality concepts.

#### 4) Internationalization

Greater access to tourism i.e. (Dutch) people travelling abroad to recently accessible or re-accessible areas such as Ethiopia, Myanmar, North Korea etc. and others having more possibilities for travelling to Europe and The Netherlands thanks to discretionary time/money such as tourists from BRIC countries

Skills and knowledge needed: cultural and/or anthropological knowledge, language knowledge, code of conduct knowledge etc.

#### 5) Need for innovations

Sustainability and ecological awareness and behaviour are becoming more important as 'natural' or fossil fuels are running out. And thanks to the sharing economy, a neo-liberal world in which governments become facilitators and public-private partnerships are more and more important, a world in which experiences make the difference, there is a need for new business models. Multi-disciplinary and cross-disciplinary research and collaboration are essential and drivers of disruptive innovations.

Skills and knowledge needed: analytical thinking, eagerness to learn, out-of-personal-boundary thinking, collaborative behaviour (no thinking in competition but in collaboration), sharing, entrepreneurial competences.

#### 6) Soft-skills!!!

In a world where velocity is key, and where experiences are the making the difference the need to connect is vital

Soft skills such as empathy, contextual thinking, adaptation, flexibility, code of conduct etc. are the most often mentioned skills for people entering and those who want to be successful in the hospitality industry.

## Annex A

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  - Leidinggevend medewerker recreatie: SFRecreatie.
- Georganiseerd Overleg Recreatie (2011b). Beroepscompetentieprofielen Recreatiebranche
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- Toezichthouder
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  - Teamleider: SFRecreatie.
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## **List of interviewed and/or consulted people**

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Frank Radstake - Manager Consumer Affairs and Social Policy ANVR

Jos Vranken – CEO Netherlands Board of Tourism and Conventions (NBTC)

John Fierman – Program Manager ROC Amsterdam Hospitality Industry

Fabienne Bont – Secretary to the Board of KHN

Diana Korteweg Maris - coordinator CELTH -HZ University of applied sciences

Renée Cohen - Vice President of Sales & Marketing Interstate Hotels Europe

## Annex B

### Lexicon

Abbreviation	Dutch Name	Translation by author
CROHO	Centraal Register Hoger Onderwijs	Central Register Higher Education
DUO	Dienst Uitvoering Onderwijs	Department Execution of Education
HAVO	Hoger Algemeen Voortgezet Onderwijs	Higher General Continued Education
HBO	Hoger Beroeps Onderwijs	University of Applied Sciences
MBO	Middelbaar Beroeps Onderwijs	Vocational Education Institute
NVAO	Nederlands Vlaamse Accreditatie Organisatie	Dutch Flemish Accreditation Organization
SHO	Algemene Stichting Horeca Onderwijs	Association Hotel & Catering Education
VAVO	Voortgezet Algemeen Onderwijs voor Volwassenen	Continued General Education for Adults
VMBO	Vorbereidend Middelbaar Beroeps Onderwijs	Preparatory Intermediate Vocational Education
VWO	Vorbereidend Wetenschappelijk Onderwijs	Preparatory Scientific Education

**List of important organizations within the Hospitality Industry:**  
**Industry Associations**  
**Employers' organizations**  
**Marketing or representative organizations**

Gastvrij Nederland  
Collaborative platform of the most important industry associations  
The members are indicated with a \*  
Bezuidenhoutseweg 12  
2594 AV Den Haag  
Phone+31 (0)70 - 3490469  
website [www.gastvrij-nederland.nl](http://www.gastvrij-nederland.nl)

\*CLC-Vecta  
De Corridor 10F  
3621 ZB Breukelen  
Phone: 0346-352444  
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Website: [www.clcvecta.nl](http://www.clcvecta.nl)

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3851 NH Ermelo  
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E-mail: [info@vvem.nl](mailto:info@vvem.nl)  
Website: <http://www.vvem.nl>

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Baarnsche dijk 10/D  
3741 LS Baarn  
Phone: 0900-8883  
Website: [www.anvr.travel](http://www.anvr.travel)

Club van Elf  
Plantage Middenlaan 2D  
1018 DD Amsterdam  
Telefoon: 088 033 21 11  
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Hoofdstraat 82  
3972 LB Driebergen  
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Fax: 0343-524701  
E-mail: [info@recron.nl](mailto:info@recron.nl)  
Website: [www.recron.nl](http://www.recron.nl)

\*Hiswa  
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E-mail: [communicatie@hiswa.nl](mailto:communicatie@hiswa.nl)  
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\*Nederlandse Vereniging van Dierentuinen  
Postadres  
Postbus 15458  
1001 ML Amsterdam  
Telefoon: 020-5246080  
Website: [www.nvdzoos.nl](http://www.nvdzoos.nl)

\*NBTC – Netherlands Board of Tourism & Conventions  
Prinses Catharina-Amaliastraat 5  
2496 XD Den Haag  
Phone: 070 370 5705

\*Koninklijk Nederlands Vervoer  
Spui 188  
2511 BW Den Haag  
Postbus 19365  
2500 CJ Den Haag  
T: 070 375 17 51  
F: 070 345 58 53  
E-mail [postbus@knv.nl](mailto:postbus@knv.nl)

\*VSCD  
Funenpark 1  
1018 AK Amsterdam  
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Website: <http://sitenederland.nl/contact/>

## List of institutes in the Netherlands offering hospitality studies

### 3.1 Higher education

#### WO education institutes (source: HBOstart)

Tilburg University - Leisure Studies -

<https://www.tilburguniversity.edu/education/masters-programmes/leisure-studies/>

Wageningen University - Master Leisure, Tourism and Environment -

<http://www.wageningenur.nl/en/Education-Programmes/prospective-master-students/MSc-programmes/MSc-Leisure-Tourism-and-Environment.htm>

NHTV - Master in Tourism Destination Management - <http://www.tourism-master.nl>

Erasmus University in cooperation with the Hotelschool The Hague - Professional Master in Hospitality Management

<http://www.eur.nl/nieuws/journalisten/archief/archief01/hospitalitymanagement/>

#### HBO education institutes – universities of applied science (source: HBOstart)

HBO Hotelschool:

- [Hogeschool Tio](#)
- [NHTV internationaal hoger onderwijs Breda](#)
- [EuroCollege Hogeschool, Versneld & begeleid](#)
- [Hogeschool NCOI](#)
- [Hogeschool NTI](#)
- [Zuyd Hogeschool](#)
- [Stenden Hogeschool](#)
- [Business School Notenboom](#)
- [Saxion Hogeschool](#)

HBO Tourism & Leisure Management:

- LOI Hogeschool
- [Hogeschool Tio](#)
- [NHTV internationaal hoger onderwijs Breda](#)
- [EuroCollege Hogeschool, Versneld & begeleid](#)
- [Hogeschool NCOI](#)
- [Hogeschool NTI](#)
- [Zuyd Hogeschool](#)
- [Stenden Hogeschool](#)
- [Business School Notenboom](#)
- Hogeschool Inholland
- Saxion Hogeschool

## 3.2 Vocational education and training

### MBO institutes (ROC's) (source: MBOstart)

<b>Albeda College</b> Postbus 9451 3007 AL Rotterdam	T: 010-2901010 F: 010-2901212 <a href="mailto:albeda@albeda.nl">albeda@albeda.nl</a>	<a href="http://www.albeda.nl">www.albeda.nl</a>
<b>Alfa-college</b> Postbus 212 9700 AE Groningen	T: 050-5973000 F: 050-5973003 <a href="mailto:info@alfa-college.nl">info@alfa-college.nl</a>	<a href="http://www.alfa-college.nl">www.alfa-college.nl</a>
<b>Arcus College</b> Postbus 207 6400 AE Heerlen	T: 045-5606700 F: 045-5606709 <a href="mailto:info@arcuscollege.nl">info@arcuscollege.nl</a>	<a href="http://www.arcuscollege.nl">www.arcuscollege.nl</a>
<b>Aventus</b> Postbus 387 7300 AJ Apeldoorn	T: 088-2836000 F: 088-2836002 <a href="mailto:centraalapeldoorn@aventus.nl">centraalapeldoorn@aventus.nl</a>	<a href="http://www.ventus.nl">www.ventus.nl</a>
<b>Da Vinci College</b> Postbus 1184 3300 BD Dordrecht	T: 088-657 2657 F: 088-657 2600 <a href="mailto:infocentrum@davinci.nl">infocentrum@davinci.nl</a>	<a href="http://www.davinci.nl">www.davinci.nl</a>
<b>Deltion College</b> Postbus 565 8000 AN Zwolle	T: 038-8503000 F: 038-8503001 <a href="mailto:ssc@deltion.nl">ssc@deltion.nl</a>	<a href="http://www.deltion.nl">www.deltion.nl</a>
<b>Drenthe College</b> Postbus 173 7800 AD Emmen	T: 088-1884444 F: 088-1884452 <a href="mailto:info@drenthecollege.nl">info@drenthecollege.nl</a>	<a href="http://www.drenthecollege.nl">www.drenthecollege.nl</a>
<b>Friesland College</b> Postbus 1781 8901 CB Leeuwarden	T: 058-2842300 F: 058-2842351 <a href="mailto:adviescentrum@fcroc.nl">adviescentrum@fcroc.nl</a>	<a href="http://www.fcroc.nl">www.fcroc.nl</a>
<b>Gilde Opleidingen</b> Postbus 1094 6040 KB Roermond	T: 0475-349349 F: 0475-349340 <a href="mailto:info@gildeopleidingen.nl">info@gildeopleidingen.nl</a>	<a href="http://www.gildeopleidingen.nl">www.gildeopleidingen.nl</a>
<b>Graafschap College</b> Slingelaan 1 7001 EA Doetinchem	T: 0314-353500 F: 0314-353519 <a href="mailto:info@graafschapcollege.nl">info@graafschapcollege.nl</a>	<a href="http://www.graafschapcollege.nl">www.graafschapcollege.nl</a>
<b>Hoornbeeck College</b> Postbus 875 3800 AW Amersfoort	T: 033-4680808 F: 033-4680875 <a href="mailto:info@hoornbeeck.nl">info@hoornbeeck.nl</a>	<a href="http://www.hoornbeeck.nl">www.hoornbeeck.nl</a>
<b>Koning Willem I College</b> Postbus 122 5201 AC 's Hertogenbosch	T: 073-6249624 F: 073-6249629 <a href="mailto:info@kw1c.nl">info@kw1c.nl</a>	<a href="http://www.kw1c.nl">www.kw1c.nl</a>
<b>Landstede Groep</b> Postbus 1 8000 AA Zwolle	T: 038-8508008 F: 038-8508040 <a href="mailto:info@landstede.nl">info@landstede.nl</a>	<a href="http://www.landstede.nl">www.landstede.nl</a>
<b>Leeuwenborgh Opleidingen</b> Postbus 1825 6201 BV Maastricht	T: 088-0015000 F: 088-0015111 <a href="mailto:centraal@leeuwnet.nl">centraal@leeuwnet.nl</a>	<a href="http://www.leeuwenborgh.nl">www.leeuwenborgh.nl</a>
<b>MBO Amersfoort</b> Postbus 2133 3800 CC Amersfoort	T: 033-4221400 F: 033-4638600 <a href="mailto:info@mboamersfoort.nl">info@mboamersfoort.nl</a>	<a href="http://www.mboamersfoort.nl">www.mboamersfoort.nl</a>
<b>MBO Utrecht</b> Postbus 7031 3502 KA Utrecht	T: 030 - 2815140 of 030-2815150	<a href="http://www.mboutrecht.nl">www.mboutrecht.nl</a>
<b>Noorderpoort</b>	T: 050-5977400	<a href="http://www.noorderpoort.nl">www.noorderpoort.nl</a>

Postbus 530 9700 AM Groningen <b>Regio College</b> Cypressehout 99 1507 EK Zaandam	F: 050-5977409 <a href="mailto:cvb@noorderpoort.nl">cvb@noorderpoort.nl</a> T: 075-6819000 F: 075-6819006 <a href="mailto:informatie@regiocollege.nl">informatie@regiocollege.nl</a> T: 026-3655700 F: 026-3655761 <a href="mailto:info@rijnijssel.nl">info@rijnijssel.nl</a> T: 0318-455500 F: 0318-455501 <a href="mailto:pwo@roc.a12.nl">pwo@roc.a12.nl</a> T: 088 017 0000 <a href="mailto:info@leijgraaf.nl">info@leijgraaf.nl</a>	<a href="http://www.regiocollege.nl">www.regiocollege.nl</a>  <a href="http://www.rijnijssel.nl">www.rijnijssel.nl</a>  <a href="http://www.a12.nl">www.a12.nl</a>  <a href="http://www.leijgraaf.nl">www.leijgraaf.nl</a>
<b>Rijn IJssel</b> Postbus 5162 6802 ED Arnhem	T: 058-2849340 F: 058-2800917 <a href="mailto:centraal@friesepoort.nl">centraal@friesepoort.nl</a> T: 072-5476600 F: 072-5476613 <a href="mailto:info@horizoncollege.nl">info@horizoncollege.nl</a> T: 079-3203020 F: 079-3203010 <a href="mailto:info@idcollege.nl">info@idcollege.nl</a> T: 0223-611200 F: 0223-610213 <a href="mailto:info@rockopnh.nl">info@rockopnh.nl</a>	<a href="http://www.roc-friesepoort.nl">www.roc-friesepoort.nl</a>  <a href="http://www.horizoncollege.nl">www.horizoncollege.nl</a>  <a href="http://www.idcollege.nl">www.idcollege.nl</a>
<b>ROC A12</b> Postbus 78 6710 BB Ede	<b>ROC De Leijgraaf</b> Postbus 420 5460 AK Veghel	<a href="http://www.rockopnh.nl">www.rockopnh.nl</a>
<b>ROC Friese Poort</b> Postbus 140 8900 AC Leeuwarden	<b>ROC Horizon College</b> Postbus 30 1800 AA Alkmaar	<a href="http://www.roc-leiden.nl">www.roc-leiden.nl</a>  <a href="http://www.rocmensoalting.nl">www.rocmensoalting.nl</a>
<b>ROC ID College</b> Postbus 70 2800 AB Gouda	<b>ROC Kop van Noord-Holland</b> Postbus 250 1780 AG Den Helder	<a href="http://www.rocmiddennederland.nl">www.rocmiddennederland.nl</a>  <a href="http://www.rocmondriaan.nl">www.rocmondriaan.nl</a>
<b>ROC Leiden</b> Postbus 16158 2301 GD Leiden	<b>ROC Menso Alting</b> Postbus 448, 9700 AK Groningen	<a href="http://www.roc-nijmegen.nl">www.roc-nijmegen.nl</a>  <a href="http://www.novacollege.nl">www.novacollege.nl</a>
<b>ROC Midden Nederland</b> Postbus 3065 3502 GB Utrecht	<b>ROC Mondriaan</b> Leegwaterplein 72 2521 DB Den Haag	<a href="http://www.rocrivor.nl">www.rocrivor.nl</a>  <a href="http://www.roc-teraa.nl">www.roc-teraa.nl</a>
<b>ROC Nijmegen</b> Postbus 6560 6503 GB Nijmegen	<b>ROC Nova College</b> Postbus 2110 2002 CC Haarlem	<a href="http://www.roctilburg.nl">www.roctilburg.nl</a>  <a href="http://www.roctop.nl">www.roctop.nl</a>
<b>ROC Nova</b> Postbus 2110 2002 CC Haarlem	<b>ROC RIVOR</b> Postbus 365 4000 AJ Tiel	
<b>ROC Ter AA</b> Postbus 490 5700 AL Helmond	<b>ROC Tilburg</b> Postbus 1330 5004 BH Tilburg	
<b>ROC Top</b> Vlaardingenvlaan 25 1062 HM Amsterdam	<b>ROC Top</b> Vlaardingenvlaan 25 1062 HM Amsterdam	

<b>ROC van Amsterdam</b> Postbus 2584 1000 CN Amsterdam	T: 020-5791000 F: 020-5791001 <a href="mailto:info@rocva.nl">info@rocva.nl</a>	<a href="http://www.rocva.nl">www.rocva.nl</a>
<b>ROC van Flevoland</b> Postbus 30131 1303 AC Almere	T: 036-5495900 F: 036-5495999 <a href="mailto:info@roclevoland.nl">info@roclevoland.nl</a>	<a href="http://www.roclevoland.nl">www.roclevoland.nl</a>
<b>ROC van Twente</b> Postbus 636 7550 AP Hengelo	T: 074-8525000 F: 074-8525010 <a href="mailto:info@rocvantwente.nl">info@rocvantwente.nl</a>	<a href="http://www.rocvantwente.nl">www.rocvantwente.nl</a>
<b>ROC West-Brabant</b> Postbus 699 4870 AR Etten Leur	T: 076-5048000 F: 076-5048010 <a href="mailto:rocwb@rocwb.nl">rocwb@rocwb.nl</a>	<a href="http://www.rocwb.nl">www.rocwb.nl</a>
<b>Scalda</b> Postbus 102 4530 AC Terneuzen	T: 0115-641600 F: 0115-641601 <a href="mailto:info@scalda.nl">info@scalda.nl</a>	<a href="http://www.scalda.nl">www.scalda.nl</a>
<b>Scholengemeenschap De Rooi Pannen</b> Postbus 1458 5004 BL Tilburg	T: 013-5955600 F: 013-5955601 <a href="mailto:info@derooipannen.nl">info@derooipannen.nl</a>	<a href="http://www.derooipannen.nl">www.derooipannen.nl</a>
<b>Summa College</b> Postbus 6101 5600 HC Eindhoven	T: 040-2694000 F: 040-2694001 <a href="mailto:info@roceindhoven.nl">info@roceindhoven.nl</a>	<a href="http://www.summacollege.nl">www.summacollege.nl</a>
<b>Zadkine</b> Postbus 1480 3000 BL Rotterdam	T: 010-2140044 F: 010-2069292 <a href="mailto:zadkine@zadkine.nl">zadkine@zadkine.nl</a>	<a href="http://www.zadkine.nl">www.zadkine.nl</a>

### 3.3 Adult education and training / lifelong training

The institutes and companies offering adult education and training are to be found at 3.2 and 3.5

### 3.5 Other work-base learning

NCOI Opleidingsgroep  
Marathon 7  
1213 PD Hilversum  
<http://www.ncoi.nl>

NTI  
<http://www.nti.nl>

LOi – Leidse Onderwijsinstellingen  
Postbus 4200  
2350 CA Leiderdorp  
tel: (071) 545 1234  
<http://www.loi.nl>

NHA  
Industrieterrein 37  
5981 NK Panningen  
tel: 077 30 67 000  
<http://www.nha.nl/>

Scheidegger Opleidingen  
Marathon 7  
1213 PD Hilversum  
<http://www.scheidegger.nl>

