TOURISM IN THE NETHERLANDS
LIST OF TABLES AND FIGURES

Table 1.1.1 Dutch tourism market ................................................................. 4
Table 1.1.2 Incoming tourism market................................................................. 4
Table 1.1.3 SWOT Analysis of tourism in The Netherlands................................. 5
Table 1.2.1 Percentages of employees per sector................................................ 6
Figure 1 Employees per sector........................................................................... 6
Table 1.2.2 Jobs in hotel & catering industry...................................................... 6
Table 1.2.3 Jobs in travel & tourism industry...................................................... 7
Table 3.1.1 HBO/WO students in hospitality industry........................................... 12
Table 3.1.2 Hotel & Catering Industry (Hotel Management studies).................... 13
Table 3.1.3 Tourism studies (HTRO)................................................................. 14
Table 3.1.4 Leisure & recreation (Leisure Management).................................... 14
Table 3.2.1 Types of education at vocational level.............................................. 15
Table 3.2.2 MBO students in Hospitality Industry 2013-2014............................... 16
Table 3.2.3 Number of MBO students by qualification, level and pathway, 2013...... 16
Table 3.2.4 Number of MBO students by qualification, level and pathway, 2013........ 17
Table 3.2.5 Number of MBO students by qualification, level and pathway, 2013........ 18
Table 3.2.6 Number of recognized training companies for MBO.......................... 19
Table 3.5.7 Recognized training companies per education type and qualification...... 19
Figure 2 Progression routes............................................................................. 23
Table 6.1.1 Vacancies in Hotel & Catering Industry.......................................... 29
Table 6.1.2 Vacancies in Travel & Tourism Industry.......................................... 29
Table 6.1.3 Vacancies in Leisure & Recreation................................................. 29
Contents

LIST OF TABLES ANF FIGURES ........................................................................................................2

1.0 TOURISM IN THE NETHERLANDS ......................................................................................... 4
  1.1 The tourism sector in The Netherlands .................................................................................. 4
  1.2 Tourism employment and skills .............................................................................................. 6

2.0 THE TOURISM EDUCATION AND TRAINING SYSTEM ..................................................... 9
  2.1 Overview of the national education and training system ....................................................... 9
  2.2 Planning of tourism education and training ......................................................................... 9
  2.3 Role of tourism employers and other stakeholders ............................................................... 9

3.0 MAIN FORMS OF PROVISION ..........................................................................................12
  3.1 Higher education .................................................................................................................... 12
  3.2 Vocational education and training ....................................................................................... 15
  3.3 Adult education and training / lifelong training ................................................................. 21
  3.4 School education .................................................................................................................. 22
  3.5 Other work-based learning .................................................................................................. 22
  3.6 General .................................................................................................................................. 23

4.0 ANALYSIS OF OCCUPATIONS ......................................................................................... 24
  4.1 Commercial managers ......................................................................................................... 24
  4.2 Accommodation operatives ................................................................................................. 25
  4.3 Management of meetings, incentives, conferences, and exhibitions management ............... 25
  4.4 Destination management ..................................................................................................... 25
  4.5 Tour operators ....................................................................................................................... 25
  4.6 Travel agencies ..................................................................................................................... 25
  4.7 Cultural, sports and recreational activities ......................................................................... 25
  4.8 Tourism education, research journalism and consulting .................................................... 26

5.0 SKILLS & COMPETENCES ................................................................................................. 27
  5.1 Gaps in provision .................................................................................................................. 27

6.0 PERFORMANCE OF THE SYSTEM .................................................................................... 29
  6.1 Learning outcomes ................................................................................................................ 29
  6.2 Progression into/within employment ................................................................................. 30

7.0 SUMMARY ..........................................................................................................................31

ANNEX A ......................................................................................................................................35
Bibliography ..................................................................................................................................35
List of interviewed and/or consulted people ...............................................................................37

ANNEX B ......................................................................................................................................38
Lexicon ........................................................................................................................................ 38
List of important organizations within the Hospitality Industry:
  Industry Associations
  Employers’ organizations
  Marketing or representative organizations ..................................................................................39
List of institutes in the Netherlands offering hospitality studies ............................................... 42
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

<table>
<thead>
<tr>
<th></th>
<th>Long (&gt; 4 days) in million</th>
<th>Short (1-3 days) in million</th>
<th>Total in million</th>
<th>Expenditures in billion</th>
</tr>
</thead>
<tbody>
<tr>
<td>Domestic:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Winter</td>
<td>2.8</td>
<td>9.2</td>
<td>17.5</td>
<td>2.8</td>
</tr>
<tr>
<td>Summer</td>
<td>5.5</td>
<td>4.6</td>
<td>10.1</td>
<td></td>
</tr>
<tr>
<td>Abroad</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Winter</td>
<td>14.5</td>
<td>3.6</td>
<td>18.1</td>
<td>12.6</td>
</tr>
<tr>
<td>Summer</td>
<td>9.2</td>
<td>4.6</td>
<td>13.8</td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>22.8</td>
<td>12.8</td>
<td>35.6</td>
<td>15.4</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Foreign tourists</th>
<th>in million</th>
<th>Average spent/stay</th>
</tr>
</thead>
<tbody>
<tr>
<td>Leisure</td>
<td>9.6</td>
<td></td>
</tr>
<tr>
<td>Business</td>
<td>3.2</td>
<td></td>
</tr>
<tr>
<td>Individual</td>
<td>75%</td>
<td>507 euro</td>
</tr>
<tr>
<td>MICE</td>
<td>25%</td>
<td>701 euro</td>
</tr>
<tr>
<td>Total</td>
<td>12.8</td>
<td></td>
</tr>
</tbody>
</table>

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**

<table>
<thead>
<tr>
<th><strong>SWOT ANALYSIS</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>STRENGTHS</strong></td>
</tr>
<tr>
<td>- Growth sector</td>
</tr>
<tr>
<td>- Diversified &amp; high quality offer</td>
</tr>
<tr>
<td>- Qualified employees on various levels</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>WEAKNESSES</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>- Adaptability to changed needs &amp; wishes</td>
</tr>
<tr>
<td>- A lot of small, family managed companies</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>OPPORTUNITIES</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>- Need for low qualified staff</td>
</tr>
<tr>
<td>- Cross-sectorial developments</td>
</tr>
<tr>
<td>- Internationalization (guests as well as labour market)</td>
</tr>
<tr>
<td>- New products and services</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>THREATS</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>- Competition (offer as well as labour market)</td>
</tr>
<tr>
<td>- Inflexibility to adapt quick enough (education as well as market)</td>
</tr>
</tbody>
</table>
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

<table>
<thead>
<tr>
<th>Employees within hospitality industry</th>
<th>%</th>
<th>FTE X 1000</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>Total</td>
<td>357</td>
<td></td>
</tr>
</tbody>
</table>

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 café’s shows a big decrease of the number of bars/café’s (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

<table>
<thead>
<tr>
<th>Hotel &amp; catering industry</th>
<th>Number of jobs in 2014</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bars, café’s</td>
<td>95.362</td>
<td>29</td>
</tr>
<tr>
<td>Restaurants</td>
<td>101.122</td>
<td>30</td>
</tr>
<tr>
<td>Fast service</td>
<td>64.607</td>
<td>20</td>
</tr>
<tr>
<td>Hotel</td>
<td>62.625</td>
<td>19</td>
</tr>
<tr>
<td>Party catering</td>
<td>8.022</td>
<td>2</td>
</tr>
<tr>
<td>Total</td>
<td>331.738</td>
<td>100</td>
</tr>
</tbody>
</table>

Source: ABF Research, 2015
Travel & Tourism industry

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.
- 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.
- 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

<table>
<thead>
<tr>
<th>Travel &amp; tourism sector</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Purchase, product management etc.</td>
<td>8%</td>
</tr>
<tr>
<td>Logistics (traffic, yield en allotment policies etc.)</td>
<td>4%</td>
</tr>
<tr>
<td>Sales and after sales (reception desk, call centre, client service, complaint handling etc.)</td>
<td>52%</td>
</tr>
<tr>
<td>Subdivided in:</td>
<td></td>
</tr>
<tr>
<td>Reception desk</td>
<td>16%</td>
</tr>
<tr>
<td>Call centre</td>
<td>36%</td>
</tr>
</tbody>
</table>

1 All data for the travel & tourism industry come from the Reiswerk dashboard (Reiswerk, 2013).
2 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.
3 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.
4 The Dutch association of travel & tourism organisations
Leisure & Recreation⁴ (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 & VVV⁵.

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).

---

⁴ 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.

⁵ 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

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. 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).

---

* 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

<table>
<thead>
<tr>
<th>Type</th>
<th>2013-2014</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotel &amp; catering industry</td>
<td>6.815</td>
<td>31%</td>
</tr>
<tr>
<td>Tourism</td>
<td>5.664</td>
<td>26%</td>
</tr>
<tr>
<td>Leisure &amp; recreation</td>
<td>9.235</td>
<td>43%</td>
</tr>
<tr>
<td>Total hospitality industry</td>
<td>21.714</td>
<td></td>
</tr>
<tr>
<td>Total HBO/WO students</td>
<td>698.247</td>
<td>3% of all HBO/WO students in hospitality industry</td>
</tr>
</tbody>
</table>

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
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\(^7\) 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)

<table>
<thead>
<tr>
<th>Typical functions or occupations in the hotel &amp; catering industry:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Restaurant manager</td>
</tr>
<tr>
<td>Reception manager</td>
</tr>
<tr>
<td>Manager of conference organiser</td>
</tr>
<tr>
<td>Event manager</td>
</tr>
<tr>
<td>Manager in de financial sector</td>
</tr>
<tr>
<td>General manager</td>
</tr>
<tr>
<td>Food &amp; Beverage manager</td>
</tr>
<tr>
<td>Rooms Division manager</td>
</tr>
<tr>
<td>Marketing manager</td>
</tr>
<tr>
<td>Banqueting manager</td>
</tr>
<tr>
<td>Sales manager</td>
</tr>
</tbody>
</table>

Source: Bernasco, 2011

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

---

\(^7\) Zuyd Hogeschool, Stenden, Hotelschool The Hague, NHTV, Saxion Hogeschool

\(^8\) 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)

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

Source: LOLTM, 2014

### Table 3.1.3 Leisure & recreation (Leisure Management)

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

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 form 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>
<thead>
<tr>
<th>Type of education</th>
<th>ROC’s offering the type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotel &amp; catering</td>
<td>41</td>
</tr>
<tr>
<td>Travel &amp; tourism</td>
<td>32</td>
</tr>
<tr>
<td>Leisure &amp; recreation</td>
<td>38</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Type</th>
<th>Students per type</th>
<th>% of total hospitality students at MBO level</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotel &amp; catering industry</td>
<td>21.383</td>
<td>64%</td>
</tr>
<tr>
<td>Tourism</td>
<td>3.033</td>
<td>9%</td>
</tr>
<tr>
<td>Leisure &amp; recreation</td>
<td>9.102</td>
<td>27%</td>
</tr>
<tr>
<td>Total MBO students hospitality industry</td>
<td>33.518</td>
<td>7% of total MBO students</td>
</tr>
<tr>
<td>Total MBO students</td>
<td>495.215</td>
<td></td>
</tr>
</tbody>
</table>

Source: Kenwerk; 2015 based on DUO, 2014

Hotel & Catering

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

<table>
<thead>
<tr>
<th>Hotel &amp; Catering industry</th>
<th>BBL</th>
<th>BOL</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Level 1</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hospitality industry</td>
<td>294</td>
<td>566</td>
<td>859</td>
</tr>
<tr>
<td>assistant</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Level 2</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Host</td>
<td>878</td>
<td>1.280</td>
<td>2.158</td>
</tr>
<tr>
<td></td>
<td>BBL</td>
<td>BOL</td>
<td>Total</td>
</tr>
<tr>
<td>------------------</td>
<td>------</td>
<td>------</td>
<td>-------</td>
</tr>
<tr>
<td>Travel &amp; Tourism</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Level 3</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sales Representative Travel</td>
<td>&lt;15</td>
<td>1.346</td>
<td>1.358</td>
</tr>
<tr>
<td><strong>Level 4</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Manager fast service</td>
<td>133</td>
<td>&lt;10</td>
<td>136</td>
</tr>
<tr>
<td>Gastronome/sommelier</td>
<td>21</td>
<td></td>
<td>21</td>
</tr>
<tr>
<td>Specialised cook</td>
<td>243</td>
<td>&lt;10</td>
<td>251</td>
</tr>
<tr>
<td>Manager service</td>
<td>280</td>
<td>118</td>
<td>398</td>
</tr>
<tr>
<td>Manager Kitchen</td>
<td>114</td>
<td>92</td>
<td>206</td>
</tr>
<tr>
<td>Manager/owner pub/bar</td>
<td>114</td>
<td>330</td>
<td>444</td>
</tr>
<tr>
<td>Manager/owner fast service</td>
<td>24</td>
<td>&lt;10</td>
<td>25</td>
</tr>
<tr>
<td>Manager/owner hotel/restaurant</td>
<td>59</td>
<td>6.878</td>
<td>6.937</td>
</tr>
<tr>
<td>Total</td>
<td>8.324</td>
<td>13.059</td>
<td>21.383</td>
</tr>
<tr>
<td><strong>% of total</strong></td>
<td><strong>38.9</strong></td>
<td><strong>61.1</strong></td>
<td><strong>100</strong></td>
</tr>
</tbody>
</table>

Source: Kenwerk; 2015 based on DUO, 2014

Travel & Tourism

Table 3.2.4 Number of MBO students by qualification, level and pathway, 2013
## Level 4

<table>
<thead>
<tr>
<th>Role</th>
<th>BBL</th>
<th>BOL</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sales Manager Travel</td>
<td>&lt;10</td>
<td>1.674</td>
<td>1.675</td>
</tr>
<tr>
<td>Total</td>
<td>13</td>
<td>3.020</td>
<td>3.033</td>
</tr>
<tr>
<td><strong>% of total</strong></td>
<td><strong>100</strong></td>
<td><strong>100</strong></td>
<td></td>
</tr>
</tbody>
</table>

Source: Kenwerk; 2015 based on DUO, 2014

### Leisure & Recreation

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

<table>
<thead>
<tr>
<th>Leisure &amp; recreation</th>
<th>BBL</th>
<th>BOL</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Level 2</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Leisure &amp; hospitality assistant</td>
<td>24</td>
<td>1.129</td>
<td>1.153</td>
</tr>
<tr>
<td>Employee water-sport industry</td>
<td>&lt;10</td>
<td>11</td>
<td>&lt;21</td>
</tr>
<tr>
<td><strong>Level 3</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Information officer</td>
<td>105</td>
<td></td>
<td>105</td>
</tr>
<tr>
<td>Receptionist</td>
<td>27</td>
<td>691</td>
<td>718</td>
</tr>
<tr>
<td>Front office employee level 3</td>
<td>309</td>
<td></td>
<td>309</td>
</tr>
<tr>
<td>Leisure &amp; hospitality host</td>
<td>24</td>
<td>1.678</td>
<td>1.702</td>
</tr>
<tr>
<td>All round employee water sport industry</td>
<td>&lt;10</td>
<td>35</td>
<td>&lt;45</td>
</tr>
<tr>
<td><strong>Level 4</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Front office manager</td>
<td>&lt;10</td>
<td>1.430</td>
<td>1440</td>
</tr>
<tr>
<td>Front office employee level 4</td>
<td></td>
<td>612</td>
<td>612</td>
</tr>
<tr>
<td>Manager information</td>
<td></td>
<td>80</td>
<td>80</td>
</tr>
<tr>
<td>Leisure &amp; hospitality executive</td>
<td>15</td>
<td>2.901</td>
<td>2916</td>
</tr>
</tbody>
</table>
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>
<thead>
<tr>
<th>Hotel &amp; Catering Industry</th>
<th>The Netherlands</th>
<th>Abroad</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>11.491</td>
<td>1.195</td>
</tr>
<tr>
<td>Travel &amp; Tourism</td>
<td>1.330</td>
<td>55</td>
</tr>
<tr>
<td>Leisure &amp; Recreation</td>
<td>1.948</td>
<td>720</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Hotel &amp; Catering Industry</th>
<th>Number of recognized training companies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Level 1</td>
<td></td>
</tr>
<tr>
<td>Hospitality industry assistant</td>
<td>5.515</td>
</tr>
<tr>
<td>Level 2</td>
<td></td>
</tr>
<tr>
<td>Host</td>
<td>4.794</td>
</tr>
<tr>
<td>Employee fast service</td>
<td>2.125</td>
</tr>
</tbody>
</table>
### Level 3
- Bartender: 101
- Independent working host: 2.935
- Independent working cook: 4.917
- 1ste employee fast service: 1.731

### Level 4
- 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

<table>
<thead>
<tr>
<th>Travel &amp; Tourism</th>
<th>Number of recognized training companies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Level 3</td>
<td></td>
</tr>
<tr>
<td>Sales Representative Travel</td>
<td>1.317</td>
</tr>
<tr>
<td>Level 4</td>
<td></td>
</tr>
<tr>
<td>Sales Manager Travel</td>
<td>1.205</td>
</tr>
</tbody>
</table>

Source: Kenwerk; 2015 based on DUO, 2014

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

<table>
<thead>
<tr>
<th>Leisure &amp; Recreation</th>
<th>Number of recognized training companies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Level 2</td>
<td></td>
</tr>
<tr>
<td>Leisure &amp; hospitality assistant</td>
<td>1.170</td>
</tr>
<tr>
<td>Employee watersport industry</td>
<td>159</td>
</tr>
</tbody>
</table>
### Level 3

<table>
<thead>
<tr>
<th>Position</th>
<th>Salary</th>
</tr>
</thead>
<tbody>
<tr>
<td>Information officer</td>
<td>681</td>
</tr>
<tr>
<td>Receptionant</td>
<td>1.139</td>
</tr>
<tr>
<td>Leisure &amp; hospitality host</td>
<td>1.418</td>
</tr>
<tr>
<td>Allround employee watersport industry</td>
<td>165</td>
</tr>
</tbody>
</table>

### Level 4

<table>
<thead>
<tr>
<th>Position</th>
<th>Salary</th>
</tr>
</thead>
<tbody>
<tr>
<td>Front officemanager</td>
<td>974</td>
</tr>
<tr>
<td>Manager information</td>
<td>500</td>
</tr>
<tr>
<td>Leisure &amp; hospitality executive</td>
<td>1.363</td>
</tr>
<tr>
<td>Executive watersport industry</td>
<td>37</td>
</tr>
</tbody>
</table>

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 and 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 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 with in 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 even evening sessions to several days.

---

9 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.

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**

---

10 See attachment x: list of the most important companies offering courses and trainings in hospitality industry
4.0 Analysis of Occupations

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\(^\text{11}\). 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.

\(^{11}\) 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**

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 reaccesible 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
   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/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.

Source: Verkenningscommissie hoger economisch onderwijs, 2014
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\textsuperscript{12}. 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.

\textsuperscript{12} 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 (Verkenningscommissie 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

<table>
<thead>
<tr>
<th>Hotel &amp; Catering industry</th>
<th>Vacancies per function group (2014)</th>
</tr>
</thead>
<tbody>
<tr>
<td>MBO level</td>
<td></td>
</tr>
<tr>
<td>Service</td>
<td>17.470</td>
</tr>
<tr>
<td>Kitchen (cook)</td>
<td>7.867</td>
</tr>
<tr>
<td>Hotel/restaurant assistant</td>
<td>2.805</td>
</tr>
<tr>
<td>Fast service</td>
<td>6.676</td>
</tr>
<tr>
<td>Manager/entrepreneur</td>
<td>575</td>
</tr>
<tr>
<td>Total</td>
<td>35.393</td>
</tr>
</tbody>
</table>

Source: Jobfeed, adapted by Kenwerk (2014)

Table 6.1.2 Vacancies in Travel & Tourism Industry

<table>
<thead>
<tr>
<th>Travel &amp; Tourism industry</th>
<th>Vacancies per function group (2014)</th>
</tr>
</thead>
<tbody>
<tr>
<td>MBO level</td>
<td></td>
</tr>
<tr>
<td>Sales Representative Travel</td>
<td>1.223</td>
</tr>
<tr>
<td>Sales Manager Travel</td>
<td>31</td>
</tr>
<tr>
<td>Total</td>
<td>1.254</td>
</tr>
</tbody>
</table>

Source: Jobfeed, adapted by Kenwerk (2014)

Table 6.1.3 Vacancies in Leisure & Recreation

<table>
<thead>
<tr>
<th>Leisure &amp; recreation</th>
<th>Vacancies per function group (2014)</th>
</tr>
</thead>
<tbody>
<tr>
<td>MBO level</td>
<td></td>
</tr>
</tbody>
</table>
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%. (Verkenningscommissie 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

The Supply of Tourism Education & Training

<table>
<thead>
<tr>
<th>Country</th>
<th>The Netherlands</th>
</tr>
</thead>
</table>

Context
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.

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

<table>
<thead>
<tr>
<th>Labour within tourism sector</th>
<th>FTE X</th>
</tr>
</thead>
<tbody>
<tr>
<td>hotel &amp; catering industry</td>
<td>168</td>
</tr>
<tr>
<td>sport, recreation</td>
<td>43</td>
</tr>
<tr>
<td>art &amp; culture, hobby’s</td>
<td>36</td>
</tr>
<tr>
<td>airlines, travel &amp; tourism companies</td>
<td>21</td>
</tr>
<tr>
<td>other supporting hospitality industry</td>
<td>89</td>
</tr>
<tr>
<td>Total</td>
<td>357</td>
</tr>
</tbody>
</table>

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.

The number of employees working in the travel & tourism industry is 11,800 Fte. This number lowered enormously due to several (big) bankruptcies in 2013. A small growth is forecasted for 2014.

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 in these companies is low educated whereas a few years ago the majority had an average education level.

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.

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)(Kenwerk, 2015)(Kenwerk, 2015)(Kenwerk, 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.

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. 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,

---

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 acces to tourism i.e. (Dutch) people travelling abroad to recently accesible or reacessible 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 antropological knowledge, language knowledge, code of conduct knowledge etc.

5) Need for innovations

Sustainiblity 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

Bibliography
ANVR-GFK “Travelscan” (2013); onderzoek in opdracht van ANVR, uitgevoerd door GFK.
Georganiseerd Overleg Recreatie (2011a). Beroepscompetentieprofielen Recreatiebranche
• Medewerker recreatie
• Allround medewerker in de recreatie
• Leidinggevend medewerker recreatie: SFReratie.
Georganiseerd Overleg Recreatie (2011b). Beroepscompetentieprofielen Recreatiebranche
Groentechnisch medewerker recreatie: SFReratie.
Georganiseerd Overleg Recreatie (2014). Beroepscompetentieprofielen zwembadbpherech (geactualiseerde versie 7 oktober 2014)
• Toezichthouder
• Allround zwemonderwijzer
• Teamleider: SFReratie.
HBO start (2015). HBO start. 2015
TNO i. s. m. CBS (2014). Nationale Enquet Arbeidsomstandigheden 2013 Methodologie en globale resultaten. Hoofddorp/Heerlen: TNO i.s.m. CBS.
List of interviewed and/or consulted people

Walter Schut – Vice-President ANVR
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**

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

*CLC-Vecta
De Corridor 10F
3621 ZB Breukelen
Phone: 0346-352444
E-mail: info@clcvecta.nl
Website: www.clcvecta.nl

*VVEM
Stationsstraat 2a
3851 NH Ermelo
Phone: 0341-559504
E-mail: info@vvem.nl
Website: http://www.v vem.nl

*ANVR
Baarnsche dijk 10/D
3741 LS Baarn
Phone: 0900-8883
Website: www.anvr.travel

Club van Elf
Plantage Middenlaan 2D
1018 DD Amsterdam
Telefoon: 088 033 21 11
E-mail: mvanaggelen@clubvanelf.nl
Website: www.clubvanelf.nl

*Recron
Hoofdstraat 82
3972 LB Driebergen
Telefoon: 0343-524700
Fax: 0343-524701
E-mail: info@recron.nl
Website: www.recron.nl
*Hiswa
Werfkade 2
1033 RA Amsterdam
Telefoon: 020 705 14 00
E-mail: communicatie@hiswa.nl
Website: www.hiswa.nl

*Nederlandse Vereniging van Dierentuinen
Postadres
Postbus 15458
1001 ML Amsterdam
Telefoon: 020-5246080
Website: 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

*VSCD
Funenpark 1
1018 AK Amsterdam
Telefoon: 020-6647211
Fax: 020-6752691
E-mail: info@vscd.nl
Website: www.vscd.nl

*Federatie van werkgeversverenigingen in de Cultuur
Funenpark 1c
1018 AK Amsterdam
Telefoon: 06-230 225 26
E-mail: info@federatiecultuur.nl

*Schiphol Airport Amsterdam
Luchthaven Schiphol
Evert v/d Beekstraat 202
1118 CP Schiphol
Nederland

*KHN
Pelmolenlaan 10
3447 GW Woerden
Phone: 0348-489489
E-mail: info@khn.nl
Website: www.khn.nl
*VvV Nederland
Bezoekadres
Maarsbergseweg 20
3956 KW Leersum
Telefoon: 0343-439489
Fax: 0343-439470
Website: www.vvv.nl
E-mail: info@vvvnederland.nl

*ANWB
Wassenaarseweg 220
2596 EC Den Haag
Telefoon: 088-2692999
Website: www.anwb.nl

HSMAI
Prinses Catharina Amalistraat 5
2496 XD DEN HAAG
(KPMG gebouw, verdieping 7)
Phone: 070 - 260 14 89
E-mail: service@hsmai.nl
Website: http://www.hsmai.nl/app/contact.php

MPI the Netherlands Chapter
Stroombaan 4
1181 VX Amstelveen
Nederland
Phone: - T: +31 20 572 73 55
E-mail: info@mpiweb.nl
Website: www.mpiweb.nl

Site Nederland Secretariaat:
Piet Heinkade 11
1019 BR Amsterdam
Phone: +31 20 5191244
E-mail: anneke.wijdogen@moevenpick.com
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 -

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) (soure: MBOstart)**

<table>
<thead>
<tr>
<th>Institute</th>
<th>Address</th>
<th>Phone Numbers</th>
<th>Website</th>
</tr>
</thead>
<tbody>
<tr>
<td>Albeda College</td>
<td>Postbus 9451, 3007 AL Rotterdam</td>
<td>T: 010-2901010, F: 010-2901212</td>
<td><a href="http://www.albeda.nl">www.albeda.nl</a></td>
</tr>
<tr>
<td>Arcus College</td>
<td>Postbus 207, 6400 AE Heerlen</td>
<td>T: 045-5606700</td>
<td><a href="http://www.arcuscollege.nl">www.arcuscollege.nl</a></td>
</tr>
<tr>
<td>Aventus</td>
<td>Postbus 387, 7300 AJ Apeldoorn</td>
<td>T: 088-2836000, F: 088-2836002</td>
<td><a href="http://www.aventus.nl">www.aventus.nl</a></td>
</tr>
<tr>
<td>Da Vinci College</td>
<td>Postbus 1184, 3300 BD Dordrecht</td>
<td>T: 088-657 2657, F: 088-657 2600</td>
<td><a href="http://www.davinci.nl">www.davinci.nl</a></td>
</tr>
<tr>
<td>Deltion College</td>
<td>Postbus 565, 8000 AN Zwolle</td>
<td>T: 038-8503000, F: 038-8503001</td>
<td><a href="http://www.deltion.nl">www.deltion.nl</a></td>
</tr>
<tr>
<td>Friesland College</td>
<td>Postbus 1781, 8901 CB Leeuwarden</td>
<td>T: 058-2842300, F: 058-2842351</td>
<td><a href="http://www.fcroc.nl">www.fcroc.nl</a></td>
</tr>
<tr>
<td>Gilde Opleidingen</td>
<td>Postbus 1094, 6040 KB Roermond</td>
<td>T: 0475-349349, F: 0475-349340</td>
<td><a href="http://www.gildeopleidingen.nl">www.gildeopleidingen.nl</a></td>
</tr>
<tr>
<td>Graafschap College</td>
<td>Slingelaan 1, 7001 EA Doetinchem</td>
<td>T: 0314-353500, F: 0314-353519</td>
<td><a href="http://www.graafschapcollege.nl">www.graafschapcollege.nl</a></td>
</tr>
<tr>
<td>Hoornbeeck College</td>
<td>Postbus 875, 3800 AW Amersfoort</td>
<td>T: 033-4680808, F: 033-4680875</td>
<td><a href="http://www.hoornbeeck.nl">www.hoornbeeck.nl</a></td>
</tr>
<tr>
<td>Koning Willem I College</td>
<td>Postbus 122, 5201 AC ‘s Hertogenbosch</td>
<td>T: 073-6249624, F: 073-6249629</td>
<td><a href="http://www.kw1c.nl">www.kw1c.nl</a></td>
</tr>
<tr>
<td>Landstede Groep</td>
<td>Postbus 1, 8000 AA Zwolle</td>
<td>T: 038-8508008, F: 038-8508040</td>
<td><a href="http://www.landstede.nl">www.landstede.nl</a></td>
</tr>
<tr>
<td>Leeuwenborogh Opleiding</td>
<td>Postbus 1825, 6201 BV Maastricht</td>
<td>T: 088-0015000, F: 088-0015111</td>
<td><a href="http://www.leeuwenborogh.nl">www.leeuwenborogh.nl</a></td>
</tr>
<tr>
<td>MBO Amersfoort</td>
<td>Postbus 2133, 3800 CC Amersfoort</td>
<td>T: 033-4221400, F: 033-4638600</td>
<td><a href="http://www.mboamersfoort.nl">www.mboamersfoort.nl</a></td>
</tr>
<tr>
<td>MBO Utrecht</td>
<td>Postbus 7031, 3502 KA Utrecht</td>
<td>T: 030 - 2815140 of 030 - 2815150</td>
<td><a href="http://www.mbountrecht.nl">www.mbountrecht.nl</a></td>
</tr>
<tr>
<td>Noorderpoort</td>
<td></td>
<td>T: 050-5977400</td>
<td><a href="http://www.noorderpoort.nl">www.noorderpoort.nl</a></td>
</tr>
</tbody>
</table>
Postbus 530
9700 AM Groningen
Regio College
Cypressehout 99
1507 ED Zaandam
F: 050-5977409
Postbus 5162
6802 ED Arnhem
F: 075-6819000
T: 026-3655700
www.regiocollege.nl
cvb@noorderpoort.nl

Rijn IJssel
Postbus 78
6710 BB Ede
F: 026-3655761
www.rijnijssel.nl
info@rijnijssel.nl

ROC A12
Postbus 420
5460 AK Veghel
F: 075-6819006
www.a12.nl
pwo@roc.a12.nl

ROC De Leijgraaf
Postbus 250
1780 AG Den Helder
F: 079-3203010
www.leijgraaf.nl
info@leijgraaf.nl

ROC Friese Poort
Postbus 140
8900 AC Leeuwarden
F: 079-3203011
www.rocfriesepoort.nl
centraal@friesepoort.nl

ROC Horizon College
Postbus 30
1800 AA Alkmaar
F: 072-5476613
www.horizoncollege.nl
info@horizoncollege.nl

ROC ID College
Postbus 70
2800 AB Gouda
F: 072-5476600
www.idcollege.nl
info@idcollege.nl

ROC Kop van Noord-Holland
Postbus 448,
9700 AK Groningen
F: 071-5824790
www.rockopnh.nl
info@rockopnh.nl

ROC Leiden
Postbus 16158
2301 GD Leiden
F: 071-5824748
www.rocleiden.nl
info@rocleiden.nl

ROC Menso Alting
Postbus 3065
3502 GB Utrecht
F: 070-5244590
www.rocmiddennederland.nl
info@mensoalting.nl

ROC Mondriaan
Leeghwaterplein 72
2521 DB Den Haag
F: 070-5244580
www.rocmiddennederland.nl
info@rocmiddennederland.nl

ROC Nijmegen
Postbus 6560
6503 GB Nijmegen
F: 023-530299
www.rocnijmegen.nl
info@rocnijmegen.nl

ROC Nova
College Postbus 2110
2002 CC Haarlem
F: 023-530294
www.rocrivor.nl
cb@novacollege.nl

ROC RIVOR
Postbus 365
4000 AJ Tiel
F: 0344-656211
www.rocrivor.nl
info@rocrivor.nl

ROC Ter AA
Postbus 490
5700 AL Helmond
F: 0492-507901
www.rocriverr.nl
info@rocriverr.nl

ROC Tilburg
Postbus 1330
5004 BH Tilburg
F: 013-5897091
www.roctilburg.nl
infopunt@roctilburg.nl

ROC Top
Vlaardingenaan 25
1062 HM Amsterdam
F: 020-4879400
www.roctop.nl
info@roctop.nl
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.n

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