Mapping and performance check of the supply side of tourism education and training

Country profile for Hungary

February 2016
EUROPEAN COMMISSION

Directorate-General for Internal Market, Industry, Entrepreneurship and SMEs
Directorate F — Innovation and Advanced Manufacturing
Unit F4 — Tourism Emerging and Creative Industries

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# Contents

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>PURPOSE OF THE COUNTRY PROFILE</td>
<td>2</td>
</tr>
<tr>
<td>EXECUTIVE SUMMARY</td>
<td>3</td>
</tr>
<tr>
<td>1.0 TOURISM IN HUNGARY</td>
<td>8</td>
</tr>
<tr>
<td>1.1 The tourism sector in Hungary</td>
<td>8</td>
</tr>
<tr>
<td>1.2 Tourism employment and skills</td>
<td>9</td>
</tr>
<tr>
<td>2.0 THE TOURISM EDUCATION AND TRAINING SYSTEM</td>
<td>12</td>
</tr>
<tr>
<td>2.1 Overview of the national education and training system</td>
<td>12</td>
</tr>
<tr>
<td>2.2 Planning of tourism education and training</td>
<td>13</td>
</tr>
<tr>
<td>2.3 Role of tourism employers and other stakeholders</td>
<td>17</td>
</tr>
<tr>
<td>3.0 MAIN FORMS OF PROVISION</td>
<td>19</td>
</tr>
<tr>
<td>3.1 Higher education</td>
<td>19</td>
</tr>
<tr>
<td>3.2 Vocational education and training</td>
<td>22</td>
</tr>
<tr>
<td>3.3 Adult education and continuing professional development</td>
<td>23</td>
</tr>
<tr>
<td>3.4 School education</td>
<td>23</td>
</tr>
<tr>
<td>4.0 ANALYSIS OF OCCUPATIONS</td>
<td>25</td>
</tr>
<tr>
<td>4.1 Commercial managers</td>
<td>25</td>
</tr>
<tr>
<td>4.2 Accommodation management</td>
<td>26</td>
</tr>
<tr>
<td>4.3 Accommodation operatives</td>
<td>27</td>
</tr>
<tr>
<td>4.4 Management of meetings, incentives, conferences, and exhibitions</td>
<td>28</td>
</tr>
<tr>
<td>management</td>
<td>28</td>
</tr>
<tr>
<td>4.5 Destination management</td>
<td>28</td>
</tr>
<tr>
<td>4.6 Tour operators</td>
<td>29</td>
</tr>
<tr>
<td>4.7 Travel agencies</td>
<td>30</td>
</tr>
<tr>
<td>4.8 Cultural, sports and recreational activities</td>
<td>30</td>
</tr>
<tr>
<td>4.9 Tourism education, research journalism and consulting</td>
<td>31</td>
</tr>
<tr>
<td>5.0 PERFORMANCE OF THE SYSTEM</td>
<td>32</td>
</tr>
<tr>
<td>5.1 Gaps in Provision</td>
<td>32</td>
</tr>
<tr>
<td>5.2 Addressing new skills and competences requirements</td>
<td>32</td>
</tr>
<tr>
<td>5.3 Learning outcomes</td>
<td>33</td>
</tr>
<tr>
<td>5.4 Progression into/within employment</td>
<td>33</td>
</tr>
<tr>
<td>ANNEX A: SOURCES</td>
<td>35</td>
</tr>
<tr>
<td>Interviewees</td>
<td>35</td>
</tr>
<tr>
<td>Bibliography</td>
<td>36</td>
</tr>
</tbody>
</table>
PURPOSE OF THE COUNTRY PROFILE

This document serves as the “country profile” for Hungary, within the study on “Mapping and performance check of the supply side of tourism education and training”. It provides a description and analysis of the educational “system” for tourism occupations in Hungary, based on evidence gathered from multiple sources (see the Annex).

More specifically, the profile provides the following:

- **Executive Summary**
- Overview of Hungary’s tourism sector, its strengths and weaknesses and the opportunities and threats it faces (section 1.1)
- Overview of the current situation and current/expected trends in tourism employment and skills (section 1.2)
- Description of Hungary’s tourism education and training system, highlighting key features of education and training system in general (section 2.1), before describing strategic arrangements for planning tourism education and training (section 2.2) and the role of employers, employees and other stakeholders (section 2.3).
- Summary of the main forms of education and training provision for tourism occupations, including higher education (section 3.1), vocational education and training (section 3.2), adult education and continuing professional development (section 3.3) and school education (section 3.5).
- Description of the education and training available for specific tourism occupations (section 4)
- Some findings on the performance of the system in terms of gaps in provision (section 5.1), addressing new skills and competences requirements (section 5.2), learning outcomes (section 5.3) and progression into/within employment in tourism occupations (section 5.4)

The breadth and diversity of the tourism sector, tourism occupations and education and training provision for those occupations mean that this profile can give no more than an overview. However, the country profiles of the 28 Member States have together provided the evidence for the analysis and research findings presented in the EU-level Final Report of the study.
Executive Summary

The Supply of Tourism Education & Training

<table>
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<tr>
<th>Country</th>
<th>Hungary</th>
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</thead>
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<tr>
<td>Context</td>
<td>A total of 8.1m visitors in 2012 has brought 270,336 million HUF in gross revenue for the country (Hungarian Tourism 2012). Despite the sector’s importance to the Hungarian economy, the social recognition of tourism-related jobs is relatively low. Wages in the sector are much lower than in other sectors, generally reaching only about 60% of the national average. Although the sector has been growing in the last decade, stakeholders explained that the tourism sector was drastically hit by the 2008 financial crisis, leaving many service providers in debt.</td>
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</table>

### STRENGTHS
- Outstanding spas
- Popular conference destination
- Budapest is an attraction
- Balaton is a popular Central and Eastern European holiday destination

### WEAKNESSES
- Strong seasonal concentration
- Strong geographical concentration
- Low wages in the sector which means that talented people go elsewhere

### OPPORTUNITIES
- Development of good infrastructure
- Growth in domestic tourism
- EU funds for tourism development
- Development of new international co-operation

### THREATS
- The international financial crises might have a negative impact on Hungary’s competitiveness
- The domestic demand further decreases

### Tourism employment and skills
In 2013, **227,500 people worked directly in tourism**, which is around 6% of the total employment in Hungary. The most recent data shows that under tourism employment, most people work in the food and beverage serving industry (100,794 in 2010) and passenger transport (94,026 in 2010), while the rest work in accommodation services (31.641 in 2010), the cultural industry (35,567 in 2010), sports and recreation (21,876 in 2010) and travel agencies (7,668 in 2010).

According to the interviews with employers, there is a shortage of skilled workers with a secondary level vocational degree. In this study, two different factors emerged that might have an impact on this shortage trend. On the one hand, those trained, young people, who complete their vocational education together with the secondary level school-leaving exam and speak foreign languages, often, leave the country in order to work in Western Europe. On the other hand, vocational education outside higher education is considered low level and low quality, often called as ‘useless’.

Consequently, those positions that require vocational training, but no higher education degree are often filled with BA graduates. As a result, BA graduates tend to find themselves in lower positions with lower wages compared to what they expect during their studies and people with vocational qualifications face serious employability problems. **Employers highlighted the lack of practical and soft skills in each occupational category at each educational level.** Additionally, **communication skills, advanced business skills and protocol-related knowledge/awareness were often mentioned as missing skills.**

More specific skills gaps have been identified in the commercial manager occupational...
The Supply of Tourism Education & Training

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<th>Country</th>
<th>Hungary</th>
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categories, where in some positions (yield manager, pricing manager, revenue manager for instance) the necessary skills are taught only by employers in the form of in-house training courses or work-based learning.

The tourism education and training system

There are courses within the educational system run by schools and higher education institutions, as well as training courses that are run outside the educational system by vocational training institutions. To be admitted to vocational education and training students must have completed 8 years of primary or lower secondary education.

From 2013/14, advanced vocational programmes are exclusively provided by higher education institutions. Since the introduction of the Bologna system of higher education in 2006, institutions are allowed to commence only one type of Tourism and Catering bachelor programme. These BA programmes take six semesters (three years) and contain a compulsory one-semester long work placement. Some institutions launched Tourism Management master degree programmes in the 2008/2009 academic year, but so far only a few students earned a degree and hence no appreciable experience is available about this type of degree. Students, who complete their BA in Tourism & Catering programme, obtain a diploma in economics specialised in Tourism & Catering (Mondok, 2014).

Adults can also participate in vocational ‘adult education’ programmes that are offered part-time or in distance learning. These courses do not differ from regular full-time courses in terms of objectives, admission criteria, structure or curricula, or the awarded state-recognised qualifications. In general more NQR qualifications are issued by adult training providers than by VET institutions within the school system. In adult training, outside the school system most NQR qualifications may be obtained.

The share of tourism in vocational education and training exceeds 10%, while in higher education it is around 4% (Formádi, 2009:40). In terms of the level of education, most of the tourism-related vocational courses are secondary-level courses.

In addition to NQR courses and ‘training regulated by public authorities’, adult training outside the school system offers courses of various types and duration that do not award a state-recognised qualification. Admission, duration and other characteristics of these courses are defined by the training providers, by legislation, or by the responsible specialised state agency in case of ‘mandatory further training programmes’. The number of available courses in this category outside the formal school system is not known and shows a very ‘obscure picture’ (Formádi, 2009:39).

Adult training providers are mostly public and higher education institutions, other state-supported institutions, private training companies, NGOs, employers providing in-house training for their employees.

At secondary level, in Hungary there are approximately 200 institutions that provide tourism education (Formádi, 2009). At secondary level tourism education is delivered within tourism-related school programmes and vocational training (NQR) courses run by secondary schools. Vocational qualification (NQR) can be offered by any education and training institutions.

After the completion of primary and lower secondary education, learners can choose between three types of vocational education and training pathways at secondary level:

- Grammar schools that offer four years of general education and award a secondary school leaving certificate, which is a prerequisite for admission to
The Supply of Tourism Education & Training

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higher education, graduates can also move to post-secondary VET.
- Since 2013 ‘secondary vocational schools’ provide VET parallel to general education from grade 9. Students obtain a certificate that qualifies them to enter at least one occupation in the sector of their training. If they wish they can continue their studies and train for a post-secondary level vocational qualification.
- Since 2010, ‘vocational schools’ run a special three-year VET programme, called ‘early VET’ (előrehozott szakiskolai képzés), which allows students to start vocational training right after the completion of the 8th grade of primary school at the age of 14, so they may obtain their first vocational qualification at the age of 17. The new Act of 19 December 2011 on vocational education introduced the so-called ‘dual VET model’, which is being introduced from September 2015.

According to this system vocational school programmes run for 3 years, simultaneously providing vocational and general education from the start. The proportion of practical training in the new 3-year programme is much higher, while the theoretical and general education parts are lower (Bükki et al., 2012, Cedefop, 2011).

In both vocational and secondary vocational schools NQR qualifications are awarded after the vocational examination. These qualifications entitle the holders to practice the occupations specified in the respective vocational and examination requirements. The new VET act of 2011 allows graduates of vocational schools to obtain a ‘secondary school leaving certificate’ or a ‘vocational secondary school leaving certificate’ in just two years. Moreover after 5 years of work and passing a master craftsman examination (mestervizsga) vocational school graduates without a secondary school leaving certificate can also pursue higher education studies in the field that matches their VET training.

In the tourism sector large hotel chains prefer to train their own employees in-house, whereas small- and medium-sized employers need state funding and other financial incentives to invest in the training of their employees (Bükki et al., 2012). Interviews showed that in some occupational categories employers (especially large multinational hotel chains) prefer to train their own people through in-house company training schemes. These can be organised by individual hotels or at brand level. These courses are offered to new recruits or young graduates as well as for existing employees to encourage career progression.

On the industrial level, the Hungarian Chamber of Commerce is coordinating the strategic planning mechanism of tourism education and training.

Since 2012 - within the Hungarian Chamber of Commerce - the so-called County Development and Training Committees (megyei fejlesztési és képzési bizottságok, MFKB) forecast the number of employees in demand in the different occupational groups. The MFKBs are county (capital) level bodies established with the objective of improving VET and enforcing labour market needs through consulting, reviewing, giving recommendations and advise. The MFKB contributes to coordinating national economy needs and VET development based on labour market information, employment and employability data and prognoses. It makes recommendations on capital/county level needs of VET, the vocational qualifications in which training can be supported from the central government budget and those in which it cannot be, and student quotas for each school maintainer (shares of student enrolment). It makes a recommendation on those vocational qualifications that in the given county qualify for scholarship support as defined in the government decree on the vocational school scholarship. It makes a recommendation...
The Supply of Tourism Education & Training

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on the beneficiaries and the amount of support these can get through tenders funded from the decentralised section of the training sub-fund of the National Employment Fund (Bükki et al., 2012).

The MFKBs formulate their county-related proposals by 31 March each year, in which they identify how many professionals each county will need in the different occupational groups in the following year. These proposals are then submitted to the Ministry of National Economy, which presents the proposal to the government. Based on the content of the proposals the Government issues a decree that lays down the number of funded, partially-funded and non-funded vocational programmes for the following year. The government also defines those occupational groups, in which there is shortages of available skilled labour and allocates additional funds to students and enterprises which offer practical training.

Employers offer feedback on the adequacy, quality and the relevance of provision to educational providers directly, to the government through industrial associations as well as through the forums of the Hungarian Chamber of Commerce and Industry if and when they are invited for a discussion. All of these feedback channels are managed proactively by tourism employers and other stakeholders, without a structured and formalised system. It is not defined which employers or organisations and based on what criteria might get involved in the feedback process. All organisations act informally, independently and on an ad hoc basis when issues arise or when they are invited by the Chamber of Commerce.

Analysis of gaps in skill & competences

Across all sectors in tourism and catering, stakeholders identified the following gaps in skills:

- Lack of practical experience;
- Lack of entrepreneurial competences;
- Lack of soft skills, especially deficiencies in representation, communication skills and knowledge about protocol; and
- Lack of up-to-date IT and digital skills.

Regarding tourism-related higher education, stakeholders claimed that instead of the mandatory one-semester apprenticeship, two-semesters would be necessary. Based on the experiences of the Bologna-system so far the current BA in Tourism and Catering should be divided into a separate Tourism and a separate Catering BA as the current system cannot offer enough practical and applied knowledge especially in the field of catering (Mondok, 2014). Due to the current legislation, higher education institutions are limited in the range of specialisations that they can offer under Tourism and Catering BA programmes. Employers in the different occupational groups would require more specialised knowledge than the current educational programmes offer.

New skills would be necessary to meet the demand of employers. Employers and educational institutions cooperate informally in order to align the skills and competence requirements on the industry with those that are taught in education. However in the current system strategic planning and dialogue in the sector is rather centralised and neither the dialogue, nor strategic planning is managed in a systematic way. Skills shortages are addressed in an ad hoc fashion, when legislative problems arise rather than in a long-term, planned manner. There are some good initiatives for the modernisation of the NQR, especially in the field of catering; however these initiatives are not planned on the policy-level
The Supply of Tourism Education & Training

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documents to be implemented in the tourism field.

In the majority of tourism occupations, companies in Hungary employ people with a higher education degree. This is partly due to the fact that the level of theoretical and practical knowledge of pupils completing secondary-level vocational or adult training courses is very much undervalued by employers. Stakeholders argued that vocational courses are not practical enough and hence do not prepare pupils for work. Vocational education outside of higher education institutions is considered too low level in quality by employers. Graduates from these courses do not have sufficient foreign language competences, lack depth in their theoretical knowledge as well as in practical skills and competencies. Consequently the industry employs people with a higher education degree even for jobs that would not require a BA degree. This leads to many BA graduates ending up in low-skilled and low-paid jobs and talented people with secondary-level vocational training leaving the country and going to work in Western Europe.

Progression from vocational education into employment is difficult in Hungary. Most of the investigated occupations are not regulated, and even those that are regulated do not require tertiary-level training. However due to the large number of higher education graduates in the sector and the low quality of vocational education in general, employers demand a BA degree in most investigated occupations. Progression into employment is much easier from higher education than from vocational training, however even graduates with higher education degrees often end up in low-skilled and low-paid jobs. Progression within employment is linked to experience and work-place training. Interestingly, while in the past, many corporate managers have progressed within the industry by working their way up on the career ladder and entered the profession without formal tertiary training - today the sector prefers BA graduates and progression is linked to in-house training and specialised industry experience.

In terms of skills, entry into tourism education requires soft skills, foreign language, and IT skills as well as a certain level of general business knowledge that people with vocational education generally do not have.

Even graduates of tertiary degrees often lack soft skills, communication skills and general practical business skills. Consequently they often need to start at the lowest level in industry and by acquiring practical skills and experience, slowly work their way up on the career ladder. Employers tend to train young graduates on the job, rather than taking the value of their degree on face value.
1.0 TOURISM IN HUNGARY

1.1 The tourism sector in Hungary

Hungary has been one of the most visited tourist destinations in Europe in recent decades. It has world famous spas, it is a popular conference destination and Budapest, the capital has many attractions that draw tourists from all over the world. Hungary’s tourism offer concentrates on 6 key areas:

- Cultural and heritage tourism;
- Eco-tourism;
- Meeting, events, conferencing and exhibitions;
- Spa, health and wellness tourism;
- Adventure tourism; and
- River cruising.

Besides these key subsectors, medical tourism also has a strategic role. Hungary’s tourism is both geographically and seasonally concentrated. Geographically around the largest Hungarian Lake Balaton, the capital Budapest and Central Danube, and the Western Transdanubia region, where 70.4% of total guest nights are registered, while seasonally tourism is concentrated in July and August (European Commission 2014, Hungarian Tourism 2012). The least guest nights are concentrated in the winter months, particularly in January and February. Tourism in Hungary is also characterised by the short length of stays and the low share of domestic tourism. The average length of stay in 2012 was 2.6 days.

According to statistics, tourism is growing, with an overall growth of over 7% in March to June 2013 and a 6% increase in overnight stays between 2012 and 2013. In 2013, the direct contribution of the tourism sector to GDP was 1,209.3bn HUF, which is 4.1% of total GDP. This is forecast to rise to 5% of total GDP by 2025 (World Travel and Tourism Council 2014). In 2012, the number of international tourist arrivals in Hungary totalled 14.9 million (+9.2% compared with 2011), while visitor spending reached €2,796m (-7.9% over 2011) (OECD, 2014: 149).

In 2013, 227,500 people worked directly in tourism, equivalent to 6% of total employment. Investment in travel and tourism in 2013 accounted for 3.9% of total investment in Hungary (World Travel and Tourism Council 2014), while the 8.3m visitors in 2012 has brought 270,336 million HUF in gross revenue for the country ( Hungarian Tourism 2012). Despite the sector’s importance to the Hungarian economy, the social recognition of tourism-related jobs is relatively low. Wages in the sector are much lower than in other sectors: in 2012, the average gross salary was 63% of the national average (European Commission, 2014).

Besides the spa and health tourism sectors, conference tourism and medical tourism are also strategic products (European Commission 2014). Hungarian tourism is performing well, overnight stays increased over 6% year-on-year in 2012-2013. According to the national tourism strategy, New Tourism Development Concept 2014-20, the future tourism offer will address Hungary’s challenges and promote low-season arrivals, develop new supply segments such as medical, heritage and ecotourism, and will improve infrastructure in areas like Lake Balaton.
Table 1.1 SWOT Analysis of tourism in Hungary

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<tr>
<th>SWOT ANALYSIS</th>
<th>STRENGTHS</th>
<th>WEAKNESSES</th>
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<tbody>
<tr>
<td></td>
<td>Outstanding spas</td>
<td>Strong seasonal concentration</td>
</tr>
<tr>
<td></td>
<td>Popular conference destination</td>
<td>Strong geographical concentration</td>
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<tr>
<td></td>
<td>Budapest is an attraction</td>
<td>Low wages in the sector which means that talented people go elsewhere</td>
</tr>
<tr>
<td></td>
<td>Balaton is a popular Central and Eastern European holiday destination</td>
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<tr>
<th>OPPORTUNITIES</th>
<th>THREATS</th>
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<tbody>
<tr>
<td>Development of good infrastructure</td>
<td>The international financial crises might have a negative impact on Hungary’s competitiveness</td>
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<tr>
<td>Growth in domestic tourism</td>
<td></td>
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<tr>
<td>EU funds for tourism development</td>
<td>The domestic demand further decreases</td>
</tr>
<tr>
<td>Development of new international co-operation</td>
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1.2 Tourism employment and skills

As mentioned above, the number of jobs in the tourism sector in 2013 has reached 227,500, giving 6% of total employment. This figure includes employment in hotels, travel agents, airlines and passenger transportation services (World Travel & Tourism Council, 2014). It also includes those activities of the restaurant and leisure industries that are directly supported by tourists. According to the World Travel and Tourism Council, The total contribution of Travel & Tourism to employment (including wider effects from investment, the supply chain and induced income impacts) was 394,500 jobs in 2013, or words 10.0% of total employment.

The chart below shows that there is a slight increase in the number of jobs in the tourism sector, not only in nominal terms, but also as a percentage of whole economy employment.

Figure 1.1 Direct contribution of travel and tourism to employment

Source: (World Travel & Tourism Council, 2014)
There is less data available about subsectors and the different types of occupational groups within tourism employment. The most recent data, published by the OECD in 2014, illustrates that under tourism employment, most people work in the food and beverage serving industry (100,794 in 2010) and passenger transport (94,026 in 2010), while the rest work in accommodation services (31,641 in 2010), the cultural industry (35,567 in 2010), sports and recreation (21,876 in 2010) and travel agencies (7,668 in 2010).

**Table 1.2 Employment in tourism (OECD, 2014)**

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<th>2008</th>
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<tr>
<td>Total tourism employment (direct)</td>
<td>301,831</td>
<td>282,077</td>
<td>291,572</td>
</tr>
<tr>
<td>Accommodation services for visitors</td>
<td>34,098</td>
<td>30,274</td>
<td>31,641</td>
</tr>
<tr>
<td>Food and beverage serving industry</td>
<td>106,316</td>
<td>101,603</td>
<td>100,794</td>
</tr>
<tr>
<td>Passenger transport</td>
<td>92,153</td>
<td>88,550</td>
<td>94,026</td>
</tr>
<tr>
<td>Travel agencies and other reservation services industry</td>
<td>6,369</td>
<td>6,032</td>
<td>7,668</td>
</tr>
<tr>
<td>Cultural industry</td>
<td>40,278</td>
<td>34,119</td>
<td>35,567</td>
</tr>
<tr>
<td>Sports and recreation industry</td>
<td>22,616</td>
<td>21,500</td>
<td>21,876</td>
</tr>
<tr>
<td><strong>Gender breakdown</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Male (% of total tourism employment)</td>
<td>58</td>
<td>57</td>
<td>57</td>
</tr>
<tr>
<td>Female (% of total tourism employment)</td>
<td>42</td>
<td>43</td>
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*Source: OECD 2014: 196*

As the table shows, the majority of employees in the sector are male; however gender is strongly differentiated between the different occupational sub-groups. Research suggests that the majority of female employees work in travel agencies and in the accommodation service industry, while the subsectors of catering and passenger transport services are male dominated (Veroszta, 2011). Due to the strong seasonality of the tourism industry, employment often fluctuates between the different periods. In many places, especially in hotels and camping sites, people are employed as permanent workers but are then laid off or transferred to a different position at the end of the season. This seasonality mostly characterises occupations that require less skills and education than those which require a degree (Formádi, 2009).

Jobs in the tourism industry are generally low paid. For example, the salary of a graduate employee in tourism and catering was 135,000 HUF in 2008, which places tourism into the lowest paid employment categories (Formádi, 2009). Interviewees stated that professionals in tourism today earn only 60% of the national average salary. Employment in the sector is also characterised by strong duality in terms of educational levels. On the one hand there are many jobs that require minimal or no training, but at the same time other positions require highly qualified workers. Moreover, in some job categories people are often self-employed (tourist guides for instance), whereas in others full-time employment is the norm (mostly at multinational corporations).

According to the interviews with employers, there is a shortage of skilled workers with a secondary level vocational degree. Interviewees explained that those trained, young people, who complete their vocational education together with the secondary level school-leaving exam (érettségi) and speak foreign languages, often, leave Hungary to work in Western Europe. Consequently, those positions that require vocational training, but no higher education degree are often filled with BA graduates. As a result, BA graduates tend to find themselves in lower positions with lower wages compared to what they expect during their studies. Employers highlighted the lack of practical skills in each occupational category at each educational level. Additionally
communication skills, advanced business skills and protocol-related knowledge/awareness were often mentioned as skills gaps.

More specific skills gaps have been identified in the commercial manager occupational categories, where in some positions (yield manager, pricing manager, revenue manager for instance) the necessary skills are taught only by employers in the form of in-house training courses or work-based learning.
2.0 THE TOURISM EDUCATION AND TRAINING SYSTEM

2.1 Overview of the national education and training system

Before embarking on a description of how tourism-specific education and training is organised in Hungary, it would be useful to put the findings in context. A short summary is therefore provided below highlighting the key characteristics of the national education and training system and the main challenges to skills provision.¹

- The country’s tertiary attainment rate is significantly lower than the EU average (28.1% vs 34.6% in 2011) but the rates for native-speaking males and females have increased more than the EU average in the past three years.
- The average number of foreign languages learned per pupils at ISCED 2 level is the lowest in Europe, at the same level as UK and Ireland.
- The participation rate of adults in lifelong learning continues to be one of the lowest in Europe (2.7% vs. EU average of 8.9%), and has even shown further decrease in recent years.
- The employment rate of graduates decreased substantially, by over 6 %-points, during the recent economic crisis and fell from just above the EU average in 2006 (79.8% vs. 79.0%) to well below the EU average in 2011 (73.5% vs. 77.2%).
- Employment in high qualification jobs up to 2020 is forecast to increase faster than the EU average, while there will be a decrease in demand for medium and low qualification jobs.
- Public spending on education as a share of GDP in Hungary is below the EU average (5.12% vs. 5.41% of GDP in 2009). Budget cuts resulting from the financial crisis are most present in higher education. The state has significantly decreased the number of state financed places in enrolment.
- Hungary has been largely influenced by the concept of competences and skills. Improving the skills supply has been the focus of education reforms at all levels, building a comprehensive forecasting system for the anticipation and assessment of skills needs at national level. Furthermore, outcomes of graduate tracking and middle to long-term employment forecasts are considered in the definition of the number of state-financed places in higher education.
- In the framework of the on-going VET reform, the apprenticeship system will be reinforced. This is expected to contribute to the improvement of the labour-market relevance of the training, currently identified as a challenge. Chambers of Commerce and Industry became an important player in the VET provision. They have an enhanced role in defining teaching content, revision of official list of vocations and defining the number of places offered at regional level.
- Higher level vocational programmes, offered by a great number of higher education institutions, lead to a higher level vocational qualification without a higher education degree. They provide 120 ECTS, 30-60 ECTS of which can be validated as part of specific first-cycle programmes in the case of further studies. The programmes offer higher level vocational, technical and professional skills and can therefore react more quickly to the needs of the labour market. Some degree

courses are offered as part-time programmes and distance learning programmes to accommodate the needs of working people.

### 2.2 Planning of tourism education and training

#### 2.2.1 Overview

The central administration of vocational education and adult training – along with that of employment and tourism policy - falls under the competence of the Ministry for National Economy (Nemzetgazdasági Minisztérium, NGM). The NGM regulates the provision of vocational education, but shares responsibility with other ministries responsible for specific vocational qualifications and the Ministry for Human Resources (Emberi Erőforrások Minisztériuma, EMMI, responsible for education as well as social policy) for defining learning outcomes and framework curricula of vocational education (Bükki et al., 2012). The Ministry’s Tourism and Catering Department, led by the Deputy State Secretary for Tourism, is responsible for the elaboration and implementation of the national tourism development strategy, for legislative tasks related to tourism, for international co-operation in tourism affairs, and for the supervision of the Hungarian National Tourist Office (OECD 2014).

![Image of Tourism-related public institutions](source: OECD 2014: 192)

The Tourism and Catering Department co-operates closely with other government departments that have tourism-related responsibilities: the Ministry of Human Resources for cultural tourism; the Ministry of Rural Development for rural tourism development and ecotourism; the Ministry of Foreign Affairs – for travel advisories, visa issues and crisis management; the National Statistical Office for tourism statistics; and the National Development Agency for national and regional development programmes (OECD 2014).

In Hungary, qualifications, vocational requirement modules, the National Qualification Register (NQR) (Országos Képzési Jegyzék, OKJ), examination regulations, and funding are all regulated by government decrees. Since 2012, the Ministry for National Economy is assisted by the Vocational Education, Training and Adult Education Directorate of the National Labour Office (Nemzeti Munkaügyi Hivatal, Szakképzési és Felnőttképzési Igazgatóság, NMH SZFI) in tasks related to development, coordination, research, information and counselling services.
Since 2010, the role of the Hungarian Chamber of Commerce and Industry (Magyar Kereskedelmi és Iparkamara, MKIK) has increased significantly; it has become a key actor in shaping vocational policy. The MKIK is now responsible for developing core curricula and examination procedures for the majority of qualifications preparing for blue-collar jobs, participates in the organisation of examinations, and performs quality assurance functions, in cooperation with national economic interest representation organisations (Bükki et al., 2012).

Following the VET Act of 1993, the National Qualifications Register was first published in 1994. The new government that came into office in 2010 has completely restructured the VET, which affected the NQR as well. The new NQR was published in a government decree in the summer of 2012. Mandatory phasing in of the new NQR began in 2013 within the formal school system. The vocational and examination requirements of the NQR, updated and published in 2006, lists the vocational, personal, social and methodological competences for every vocational qualification, the acquisition of which is a prerequisite to obtaining the qualification (Bükki et al., 2012).

2.2.2 Forecasting

Currently the Institute for Economic and Enterprise Research of the Hungarian Chamber of Commerce and Industry (Gazdaság- és Vállalkozáskutató Intézet, Magyar Kereskedelmi és Iparkamara) carries out data collection in cooperation with the Ministry for National Economy. Since 2004 forecasts have been made once a year, for a period of one and a quarter years. The forecasts are based on a stratified sample of companies, representative for sector and size. They provide information about prospective lay-offs and future demand – in general and specifically for career starters - in particular occupations. Labour centres of county government offices also regularly prepare quarterly surveys of prospective layoffs and opening positions planned by companies in the following 3 and 12 months, but these are not based on representative samples (Bükki et al., 2012).

According to the interviews, competences and future skill needs may be forecasted by MKIK, employers or educational and training institutions. The last revision of skills and competencies in the NQR was carried out in 2012 (Government Decree 150/2012 about NQR). This study showed that the future skills needs across the sector are mostly forecasted by the sector itself on a voluntary basis. Employers as well as schools and higher education institutions can initiate the modernisation of vocational occupations at the Hungarian Chamber of Commerce or at the Ministry of National Economy directly.

The Hungarian Chamber of Commerce, the National Association of Employers in the Tourism and Catering Industry, employers and higher education institutions work with each other in different informal partnerships and networks and tend to alert the government on an ad hoc basis, if and when certain issues arise. Employers explained that they co-operate with the government and with higher education institutions to alert them to future skills needs in their own fields.

In catering occupations, there is a large transformation at the moment. Industrial partners criticised the educational materials in vocational education and training, which they find outdated and lacking sufficient focus on practical skills. The government together with the Hungarian Chamber of Commerce developing a new list of updated occupations in the catering sector, as many of the registered occupations no longer exist and there are some new occupations that are not listed in the current registry. A similar modernisation project is planned in the tourism industry; however work in this field has not yet started.
2.2.3 Strategic planning

On the industrial level, the Hungarian Chamber of Commerce is coordinating the strategic planning mechanism of tourism education and training. Since 2008, annual surveys on regional labour market supply and demand for skilled workers have been carried out to assist regional development and training committees (regionális fejlesztési és képzési bizottságok, RFKB) to make well-informed decisions and recommendations about school-based vocational enrolment (Bükki et al., 2012). Since 2012 - within the Hungarian Chamber of Commerce - the so-called County Development and Training Committees (megyei fejlesztési és képzési bizottságok, MFKB) forecast the number of employees in demand in the different occupational groups. The MFKBs are county (capital) level bodies established with the objective of improving VET and enforcing labour market needs through consulting, reviewing, giving recommendations and advise. The MFKB contributes to coordinating national economy needs and VET development based on labour market information, employment and employability data and prognoses. It makes recommendations on capital/county level needs of VET, the vocational qualifications in which training can be supported from the central government budget and those in which it cannot be, and student quotas for each school maintainer (shares of student enrolment). It makes a recommendation on those vocational qualifications that in the given county qualify for scholarship support as defined in the government decree on the vocational school scholarship. It makes a recommendation on the beneficiaries and the amount of support these can get through tenders funded from the decentralised section of the training sub-fund of the National Employment Fund (Bükki et al., 2012).

The MFKBs formulate their county-related proposals by 31 March each year, in which they identify how many professionals each county will need in the different occupational groups in the following year. These proposals are then submitted to the Ministry of National Economy, which presents the proposal to the government. Based on the proposals, the Government issues a decree that lays down the number of funded, partially-funded and non-funded vocational programmes for the following year. The government also defines those occupational groups, in which there are shortages of skilled labour and allocates additional funds to students and enterprises which offer practical training. For occupations that feature skills shortages, the government allocates additional funds to students and enterprises which offer practical training (Bükki et al., 2012). For instance in the catering industry, chefs were mentioned in the interviews as an occupation, in which there is shortage in Zala county. Among the occupational groups that are investigated in this report, none of them have been identified as being in shortage.

Tourism-related strategic plans have been integrated into the National Tourism Development Strategy (2005-2013) and the National Tourism Development Concept (2014-2024). Interestingly, while the 2005-2013 strategy addressed tourism education and training development as a strategic goal and highlighted that education needs to be improved in order to match labour market requirements, - according to interviews - from the 2014-2024 strategy the ‘human element’ is largely missing. Indeed, the National Tourism Development Concept seems to ignore employment and education/training related objectives and tends to focus more on the details of the tourism offer itself. Industrial stakeholders expressed their concerns about not being involved in the development of the current strategy. Interviewees explained that although formally consultations were held, they did not have enough time to formulate their views on the strategy as only two weeks were given for their feedback and even if they contributed their opinions were not taken into consideration. Many of them did not even know about the consultation process or had not heard about the current strategy and thus felt excluded from the social dialogue.
In conclusion, strategic planning seems to be concentrated with the Chamber of Commerce and Industry and the Ministry of National Economy and the wider involvement of industrial partners is managed on an informal and ad hoc basis. Planning mostly relies on the forecasts of the Institute for Economic and Enterprise Research of the Hungarian Chamber of Commerce and Industry, but does not always formally takes into account the feedback of the industry and only occasionally and informally draws on the expertise of higher education institutions, if at all.

2.2.4 Dialogue mechanisms

Formal social dialogue mechanisms are managed at national level covering all tourism occupations together with all other occupations. Social partners are involved in various advisory councils such as:

- National Economic and Social Council (Nemzeti Gazdasági és Társadalmi Tanács, NGTT), a multi-sided forum for strategic VET issues;
- National Vocational and Adult Training Council (Nemzeti Szakképzési és Felnőttképzési Tanács, NSZFT), a consultative-advisory body to the minister in charge, participating in NQR development and allocation of training resources; and the
- National Qualification Committee (Nemzeti Képesítési Bizottság), which is a professional consultative-advisory body working on the continuous development and improvement of VET content. It monitors the development of VET qualification structure, the economic, labour market and technical-technological processes and, based on these, makes a recommendation on the modification of the NQR (Bükki et al., 2012).

Formal dialogue between employers and trade unions is managed through the ‘Sectorial Social Dialogue Committee’ (SSDC). The SSDC is a bilateral organisation between employers’ associations and sectoral trade unions, which negotiates economic and employment-related issues affecting the tourism industry. The SSDC consults the government and its institutions in order to channel the views of the industry into national strategies and programmes. The field research, however, showed that the weight of the SSDC is rather limited; stakeholders reported that their views are not always taken into consideration by the government. The SSDC is always hosted in government offices. Last year the SSDC has been transferred from a government office that ceased to exist to the Ministry of National Economy. However, the institutions have not yet started official operations due to the lack of office in the Ministry of National Economy. In this intermediate period, the bilateral organisations work in an informal manner, negotiating issues between themselves without formalised structures.

Stakeholders in the industry have differing views on how much they can engage in a dialogue with the government. The current study found that there is a lack of formal, regular dialogue between the government, the education system and employers in the field of tourism education and training or more broadly tourism. Stakeholders seem to engage with political decision-makers in an ad hoc, informal manner, when certain sectoral issues become urgent. Co-operation seems to be more intense between the different stakeholders themselves, for instance employers cooperate and negotiate with higher education institutions and the Hungarian Chamber of Commerce and Industry actively involves industrial partners when certain legislative or administrative issues arise. However, strategic, on-going and formal social dialogue is missing from the sector.
2.2.5 Procedures for accessing system performance

The current government that took office in 2010 intends to raise the share and prestige of vocational education and training (Bükki et al., 2012). According to the new system, courses of vocational education should be shorter, less theoretical and include more work-based learning. To this end, the Prime Minister and the President of the Hungarian Chamber of Commerce and Industry signed a framework agreement in November 2010. According to this, from 2013 the previously 4 to 5 year-long skilled-worker training programmes at ‘vocational schools’ (szakiskola) have been replaced by a three-year programme. ‘Secondary vocational schools’ (szakközépiskola) will also include a vocational component, including practical training right from the start and will entitle school leavers to take up certain jobs. In accordance with the Adult Training Act, providers of vocational courses have to be registered at the county labour centre (megyei munkaügyi központ) operating as part of county government offices (kormányhivatal) since 2011. Besides registration, they are free to develop and provide their vocational, general or language education courses. The law only requires them to conclude an adult training contract with the participant and prepare a formal training programme (Bükki et al., 2012). Aiming primarily to increase the quality of training, the new NQR - issued in 2012 - defines both the maximum and the minimum number of teaching hours of each OKJ programme (Bükki et al., 2012).

2.3 Role of tourism employers and other stakeholders

2.3.1 Forecasting

Tourism employers channel their views to the government through industrial associations, like the Hungarian Hotel Industry Association for instance. Like trade unions, they are not formally involved in the forecasting and planning of tourism education and training, but often proactively express their views about current issues.

2.3.2 Providing education and training

In many tourism occupations, formal education is extended by providers in the form of in-house company training schemes, as the education and training system does not provide the necessary practical skills and experience for employment. Especially in the category of commercial managers, some skills that are necessary for the occupations are only provided by employers.

2.3.3 Co-operating with providers to provide work-based learning

Employers in the tourism and education sector are becoming increasingly involved in practical training by participating in placement schemes. There are two forms of practical training at enterprises. The first is an apprenticeship training based on a ‘student contract’, which are concluded by the student and an enterprise. In this case students are officially linked to the employer and they receive remuneration for their work. In 2009, student contract-based training took place in 277 professions. Almost 90% of apprentices, however, were training for a qualification in only 10 occupations (of which only two are in the food and beverage sector, namely cook and water). While it provides various advantages to learners, it does not alter their status as students. The practical training provider has to pay a regular monthly allowance to the student, including holiday periods. Students are also entitled to social security benefits through their apprenticeship contract. The time in apprenticeship training is counted as a period of employment when calculating pensions. Training based on a ‘student contract’ is supervised by the appropriate territorial economic chamber (Cedefop, 2011).
The second form is a so called ‘cooperation agreement’ between the VET school and an enterprise to provide practical training for students. In this case, however, students cannot receive remuneration and are not contractually linked with the employer. Under the new 2011 VET act, students can start their apprenticeship based on a training contract in their first VET year at the age of 14, but in the first year practice can only take place in workshops. According to the interviews, this often proves difficult, especially in the catering sector due to the lack of available workshop place at employers that can be used solely for training purposes. In September 2015 a new government decree will come into force, which introduced the so-called ‘dual education’ system (VAT Act 2011/CLXXXVI), requiring part of the vocational course to be carried out at employers.

2.3.4 Offering feedback

Employers offer feedback on the adequacy, quality and relevance of provision to educational providers directly, to the government through industrial associations as well as through the forums of the Hungarian Chamber of Commerce and Industry if and when they are invited for a discussion. These feedback channels are managed proactively by tourism employers and other stakeholders, without a structured and formalised system. It is not defined which employers or organisations and based on what criteria might get involved in the feedback process. All organisations act informally, independently and on an ad hoc basis when issues arise.
3.0 MAIN FORMS OF PROVISION

In Hungary, tourism-related education is delivered in different forms and levels. There are courses within the educational system run by schools and higher education institutions, as well as training courses that are run outside the educational system by vocational training institutions (Formádi, 2009). To be admitted to vocational education and training students must have completed 8 years of primary or lower secondary education.

3.1 Higher education

3.1.1 Overview

Advanced vocational programmes (felsőfokú szakképzés, FSZ) were introduced in 1998 for students holding a secondary school leaving certificate (érettségi bizonyítvány). Advanced vocational programmes prepared students for high quality professional work and at the same time, through transferability of credits, helped transition from vocational education and training to tertiary level education. Advanced vocational programmes could only be run by colleges (főiskola) or universities (egyetem). However, training could also be provided by secondary vocational schools (szakközépiskola), under the supervision of a higher education institution based on cooperation agreements. This system has changed in 2012. The last time students could be admitted to advanced vocational programmes was in 2012. From 2013/14, advanced vocational programmes are exclusively provided by higher education institutions and are governed by the new Higher Education Act of 2011. Also, the name has been changed from ‘advanced vocational education and training’ (felsőfokú szakképzés) to ‘higher education vocational education and training’ (felsőoktatási szakképzés) (Bükki et al., 2012).

Higher education however, has also been reformed recently. The Bologna system of higher education was introduced in 2006. Since then, institutions are allowed to commence only one type of Tourism and Catering bachelor programme. Bachelor level education takes six semesters (three years) and contains a compulsory one-semester long work placement. Some institutions launched Tourism Management master degree programmes in the 2008/2009 academic year, but so far only a few students earned a degree and hence no appreciable experience is available about this type of degree. Students, who complete their BA in Tourism & Catering programme, obtain a diploma in economics specialised in Tourism & Catering (Mondok, 2014).

The BA in Tourism is one of the most popular programmes in higher education. While in 2010 it attracted the most applications, in 2011 it was in the second place in terms of applications (3622 applications for a BA in tourism and catering), after Economics and Management (Veroszta, 2011). In 2011, 15 higher education institutions offered a BA in Tourism and Catering, of which three institutions (Budapest Business School University of Applied Sciences - College of Commerce, Catering and Tourism, Kodolányi János University of Applied Sciences, and BKF University of Applied Sciences) account for almost 50% of all applications (Veroszta, 2011: 64). MA programmes in Tourism management are provided by seven higher education institutions (Nagy et al., 2013):

- Budapest Corvinus University;
- Budapest Business School University of Applied Sciences - College of Commerce, Catering and Tourism;
- BKF University of Applied Sciences;
- Károly Róbert University of Applied Sciences;
- Kodolányi János University of Applied Sciences;
- Pannon University; and
- University of Pécs.
The range of subjects that are offered within the BA programmes are regulated in Hungary in Decree 15/2006 (IV. 13) of the Ministry of Education on the Training and Output Requirement of the Bachelors’ and Masters’ Programmes. The legislation leaves limited scope for individual curriculum development for higher education institutions (Mondok, 2014). The decree prescribes that Tourism & Catering bachelor programmes should offer experience and practice in economics, social and applied sciences. Graduates should be able to work in the sector, manage employees and, if they wish, continue their studies at master’s level.

In the BA programmes economics, methodology and basics of business management courses account for 80-90 credits, social science subjects account for 10-20 credits while professional core material accounts for 70-credits (the curriculum consists of 180 credits in six institutional semesters and 30 credits for work placement).

Subjects under the professional core material heading are defined in the Decree as System of Tourism (T), Catering (C), Accommodation Services (T), Tour Operation (T), Resources of Tourism (T), Institutional Relationships of Tourism (T), Tourism Marketing (T), Tourism Products and Tourism Companies (T), Catering Management (C) and International Economic Relations. ‘T’ indicates tourism field, ‘C’ is the catering field (Mondok, 2014).

BA programmes in Tourism and Catering generally comprise 50-60 course units or subjects (Mondok, 2014), which often leads to fragmented knowledge and a priority on theoretical knowledge. Employers interviewed in this study highlighted that soft skills development and practical knowledge is missing from BA education and should be strengthened so that graduates’ skills could meet the requirements of the labour market. The total student workload of BA in tourism and catering provides very limited amount of time to use for soft skill development of students (Mondok, 2014).

The BA degree may also contain further specialisation on the field of tourism, in subfields such as hotel management, catering management, tour operators and event management, recreation/health tourism, and destination management (Jandala, 2010). Although specialisations are defined only in these fields in the Decree, institutions offer a diverse range of specialisations, like eco-tourism, cultural tourism, gastro tourism, wine tourism, animation manager, event manager among others (Nagy et al., 2013). Due to current legislation, however, only those specialisations can be officially included in the degree, which are listed in the Government Decree. Other specialisations, such as wine tourism or cultural tourism can only be named in the degree without an official acknowledgement (Jandala, 2010).

### 3.2.2 Evidence of the scale of provision

In Hungary, data on the number of adults participating in various forms of vocational education is incomplete. The current National Programme for Statistical Data Collection (OSAP in Hungarian) does not provide a full picture of adult training programmes and their participants (according to Ministry of Employment and Social Affairs estimates, a third of continuing vocational training activities do not appear in the system). Nevertheless, according to the Ministry of Human Resources in 2013 the number of graduates in vocational education in the field of hotel, catering and tourism was 10,030, while in tertiary institutions in travel, tourism and leisure 1,973 students received a degree (Ministry of Human Resources, 2013). More detailed information about the scale of provision in tourism education is not available.
3.3.3 Role of employers

The role of employers in higher education provision is crucial. All BA degrees require students to spend a compulsory semester in a placement to gain professional practice. However, together with the introduction of the Bologna system, the system of placements has also changed. The previously two-semester placement has decreased to one semester only. This creates many operational problems, not only because of the short period of practice, but also because all students of all institutions need to organise their work placement in the same semester, which creates shortages of work placements in some periods and an oversupply of available placement jobs in others.

Employers work together with higher education institutions and offer placements for students, generally in their last year or 7th semester. However, the term ‘semester’ is often interpreted in different ways at the different institutions.

According to Hungarian Accreditation Committee (Magyar Akkreditációs Bizottság MAB) one semester could consist of 13-15 weeks without the examination period, or 17-18 weeks if the exam period is included as well. At some institutions, the period of placement is only 4 months, while at others it is 6 months. These differences mean that employers in the sector are faced with different institutional requirements.

According to statistics, in the autumn semester of 2009 approximately 1300-1500 tourism and catering students were spending their internships in the industry (Jandala, 2010). This means that while in the autumn of 2009 the sector was ‘overloaded’ with placement requests, in the spring of 2010 there were no students available for placements. As a consequence, employers generally have a shortage of placement students in the spring and summer seasons, which are the busiest in terms of employment demand in some occupational categories (such as in event management or health tourism). According to Jandala (2010), the above mentioned ambivalence of the regulatory framework of tourism education and the industry’s professional requirements and seasonal trends cause demand-supply related discrepancies within the sector.

Furthermore, the different interpretations in the length of the placement period disadvantage those students that spend more than 5 months in placement. Due to their longer placement, they cannot finish their education according to the curriculum. They will get their degree later than their peers, and will become disadvantaged both at the university as well as in finding a job, compared to those who had a shorter placement period (Jandala, 2010). As a consequence, although the industry would demand more practical skills and longer placement periods, students are disadvantaged if they apply for a longer placement. Due to these discrepancies, higher education in tourism is not flexible enough and does not help graduates enough in their future employability.

Industry professionals consider good soft skills (Mondok, 2014), like communication skills, organisation skills, the ability to present or represent more important than deep theoretical knowledge in tourism. As a result, employers often work together with higher education institutions in competency development. Mondok’s research shows that tourism companies require up-to-date professional work experience, good foreign language skills and soft skills from graduates (2014). These findings confirm the interview data of the current study.

3.4.4 Progression routes

The number of tourism graduates exceeds labour market demand and a considerable amount of graduates continue their careers outside the profession (Szabó, 2005). In 2010 approximately 22% of the graduates were planning to leave the profession, while 16% actually continued their career outside the profession (Formádi, 2009). According to research, 3 years after graduation 64% of the BA graduates finds
employment at small- and medium-sized companies, while employment in the public sector remains insignificant in this sector (Veroszta, 2011).

The national system of career tracking is based on the mandatory data provision of students, training providers and employees (it is regulated under the law by the 2007 amendment of the Public Education Act of 1993). However the system is not ready and hence data is not available as yet. Once it becomes available, career tracking data are expected to provide feedback about whether school leavers go on to work in the vocation they have been trained for. Until the career tracking system is up and running, individual surveys are commissioned in order to provide some information and assist planning and strategy forming processes (Bükki et al., 2012).

According to the surveys of Budapest Business School University of Applied Sciences - College of Commerce, Catering and Tourism, 80-90% of BA graduates find employment in the profession.

Education and employment in the tourism sector show significant geographical differences. There is a concentration in both education and the number of available jobs in the Central Hungarian region. The volume of higher education programmes concentrates most in Central Hungary both in the number of applications and the number of BA students. In terms of finding employment after graduation, graduates in the Central Hungarian region have better chances than in other regions.

According to employers, in the employability of tourism graduates high salary expectations, lack of knowledge of foreign languages as well as the lack of practical knowledge causes concerns. Interviewees in this study explained that BA graduates in tourism and catering often become employed in jobs that do not require a higher education degree. The low level of practical knowledge of young graduates, the lack of soft skills and the lack of graduate jobs in the industry all contribute to the fact that many BA graduates find jobs in non-managerial positions. As an example some interviewees mentioned the extreme case of a cleaning position being filled with somebody who had two graduate-level degrees in tourism and catering.

### 3.2 Vocational education and training

Adults can participate in vocational ‘adult education’ programmes that are offered part-time or in distance learning. These courses do not differ from regular full-time courses in terms of objectives, admission criteria, structure or curricula, or the awarded state-recognised qualifications. In general more NQR qualifications are issued by adult training providers than by VET institutions within the school system. In adult training, outside the school system most NQR qualifications may be obtained. All courses that award an NQR qualification must meet the content requirements, admission criteria, duration and type of outcome that are specified in the vocational and examination requirements (szakmai és vizsgakövetelmények) and the examination requirement module (követelménymodul) of the given qualification. Based on these two frameworks, training providers may prepare their own curricula. Besides NQR qualifications, adult learners can also obtain nationally or internationally recognised qualifications that are not included in the NQR – these are called ‘trainings regulated by public authorities’. These trainings are regulated by the public authorities (Bükki et al., 2012, Cedefop, 2011). In the field of tourism and catering, trainings in the field of food hygiene might belong to this group.

The share of tourism in vocational education and training exceeds 10%, while in higher education it is around 4% (Formádi, 2009 :40). In terms of the level of education, most of the tourism-related vocational courses are secondary-level courses.
3.3 Adult education and continuing professional development

In addition to NQR courses and ‘training regulated by public authorities’, adult training outside the school system offers courses of various types and duration that do not award a state-recognised qualification. Admission, duration and other characteristics of these courses are defined by the training providers, by legislation, or by the responsible specialised state agency in case of ‘mandatory further training programmes’. The number of available courses in this category outside the formal school system is not known and shows a very ‘obscure picture’ (Formádi, 2009 :39).

The 3 most typical adult training programmes are:

- Vocational further training, including courses preparing for the master craftsman exam;
- Courses awarding NQR qualification; and
- Foreign language courses.

Adult training providers are mostly public and higher education institutions, other state-supported institutions, private training companies, NGOs, employers providing in-house training for their employees.

The Hungarian Chamber of Commerce and Industry defines standards and organise ‘master craftsman’ examination, in cooperation with the national economic interest representation organisations. Pursuant to the Adult Training Act, providers have to be registered at the county labour centre, but otherwise they are free to develop and provide their vocational, general or language courses. Accreditation is not mandatory; however it is a prerequisite in order to receive funding (Bükki et al., 2012, Cedefop, 2011).

Workplace training shows significant differences in the quantity and format of training provision. Large hotel chains prefer to train their own employees in-house, whereas small- and medium-sized employers need state funding and other financial incentives to invest in the training of their employees (Bükki et al., 2012). Interviews showed that, in some occupational categories, employers (especially multinational hotel chains) prefer to train their own people through in-house company training schemes. These can be organised by individual hotels or at brand level. These courses are offered to new recruits or to young graduates as well as to existing employees to encourage career progression.

3.4 School education

At secondary level, in Hungary there are approximately 200 institutions that provide tourism education (Formádi, 2009). At secondary level tourism education is delivered within tourism-related school programmes and vocational training (NQR) courses run by secondary schools.

In 2007/2008 approximately 1500 pupils were enrolled in secondary-level tourism education. Vocational qualification (NQR) can be offered by any education and training institutions, however it is very difficult to acquire reliable information about the exact number of formal courses run within the school system (Formádi, 2009 :39).

According to national legislation (Act of 19 December 2011 on national public education and Act of 19 December 2011 on vocational education and training) after the completion of primary and lower secondary education, learners can choose
between three types of vocational education and training pathways at secondary level (Bükki et al., 2012, Cedefop, 2011).

- Grammar schools (gimnázium) offer four years of general education and award a secondary school leaving certificate, which is a prerequisite for admission to higher education, graduates can also move to post-secondary VET.
- Since 2013 ‘secondary vocational schools’ (szakközépiskola) provide VET parallel to general education from grade 9. After completion of the first four years (year 9-12) and taking a ‘vocational secondary school leaving examination’ students obtain a certificate that qualifies them to enter at least one occupation in the sector of their training. If they wish they can continue their studies and train for a post-secondary level vocational qualification, which is listed in the national qualification register (OKJ) or apply for college/university.
- Since 2010, ‘vocational schools’ (szakiskola) run a special three-year VET programme, called ‘early VET’ (előrehozott szakiskolai képzés), which allows students to start vocational training right after the completion of the 8th grade of primary school at the age of 14, so they may obtain their first vocational qualification at the age of 17. The new Act of 19 December 2011 on vocational education introduced the so-called ‘dual VET model’, which is being introduced from September 2015.

According to this system vocational school programmes run for 3 years, simultaneously providing vocational and general education from the start. The proportion of practical training in the new 3-year programme is much higher, while the theoretical and general education parts are lower (Bükki et al., 2012, Cedefop, 2011).

In both vocational and secondary vocational schools, NQR qualifications are awarded after the vocational examination. These qualifications entitle the holders to practice the occupations specified in the respective vocational and examination requirements. The new VET act of 2011 allows graduates of vocational schools to obtain a ‘secondary school leaving certificate’ or a ‘vocational secondary school leaving certificate’ in just two years. Moreover after 5 years of work and passing a master craftsman examination (mestervizsga), vocational school graduates without a secondary school leaving certificate can also pursue higher education studies in the field that matches their VET training.
4.0 ANALYSIS OF OCCUPATIONS

Regulated professions in Hungary are regulated by the Act of 18 December 2001 on adult training according to the Communication of the Education Minister on Regulated Professions and the 150/2012 government decree on the National Qualifications Register. Other regulations relevant to this study include Act of 12 July of 1993 on public education, Act of 12 July of 1993 on vocational education and training, Act of 10 November of 2003 on the vocational training contribution and support of the development of training, and Act of 29 November of 2005 on higher education.

4.1 Commercial managers

4.1.1 Revenue manager

This profession is not regulated by law. Professionals in this occupational group need to complete a specific course, which is a work-based training at the employer and a general training in tourism (not specific to the occupational group) or business management in higher education. Entry into this occupation is linked to a higher education BA degree, but professionals are further trained by the employers in-house. The entry requirements are not regulated by legislation, but are based on employers’ requirements.

According to employers, the adequacy, quality and relevance of a BA in tourism for this occupation is sufficient. However there is a lack of practical knowledge and a need for further, specialised training in-house. Skill gaps in this profession relate to the lack of specialised training in this field within higher education, although some universities integrate courses that relate to revenue management into their BA programmes. A good example was seen at an international hotel chain, where all managers within the hotel are trained in-house in revenue management. The in-house course is run in two phases: level one is for all the managers; whereas level two is for those who manage multiple hotels and engage in strategic planning activities as well.

4.1.2 Sales manager

This profession is not regulated by law. Professionals in this occupational group need to complete a specific course of work-based training at the employer and general training in tourism (not specific to the occupational group) or business management in higher education. Entry into this occupation is linked to a higher education BA degree, but professionals are also trained by the employers in-house. According to employers, the adequacy, quality and relevance of a BA in tourism for this occupation is sufficient, however there is a lack of practical knowledge and a need for further, specialised training in-house. The entry requirements are not regulated by legislation, but are based on employers’ requirements.

4.1.3 Marketing manager

This is a regulated profession requiring professional qualification. The regulation requires at least a secondary-level vocational qualification, however industry representatives argued that the entry requirement into this occupation is mostly linked to a higher education BA degree in business, management, economics or tourism.

4.1.4 Web-marketing manager

The same applies as for 4.1.3., however at most employers these two occupations (4.1.3. and 4.1.4.) are done by the same people.
4.1.5 Yield manager
Same applies as to the 4.1.1. Revenue manager. Employers argued that Yield and revenue management is mostly done by the same person. Yield managers are trained by employers in-house. The entry criteria into this profession are a BA in general management, economics or tourism. The criteria are required by the industry and not legislation. The profession is not regulated.

4.1.6 Distribution manager
This occupation is often referred to as distribution channel manager or channel manager. This is a non-regulated profession requiring general training for the occupational group (not specific to the occupation). The occupation is a specialist function that requires in-house specialist training. Entry criteria generally include a higher education BA degree and in-house specialist training.

4.1.7 Pricing manager
The profession is not regulated. Same applies as to the Revenue manager. 4.1.1., 4.1.5 and 4.1.7 are mostly done by one manager.

4.1.8 Promotion/Communication manager
The profession is not regulated. Professionals in this occupational group need to complete general training in tourism (not specific to the occupational group) or a general training in business management in higher education. This occupation may be filled with a secondary level vocational qualification as well; however industry representatives argued that entry is mostly linked to a higher education BA degree in business, management, economics or tourism.

4.1.9 Travel manager (corporate customer)$^2$
This occupation is not named specifically in the NQR. However as the job probably includes tasks that are regulated, therefore it falls under the regulated professions, requiring professional qualification after formal course of training, mostly at higher education level.

4.1.10 Travel buyer (corporate customer) (turisztikai szervező, értékesítő)
This occupation is not named specifically in the NQR. However as the job probably includes tasks that are regulated, therefore it falls under the regulated professions, requiring professional qualification after formal course of training, mostly at higher education level.

4.2 Accommodation management

4.2.1 Camping ground manager
This is a non-regulated occupation that requires general training in tourism (not specific to the occupational group). It requires a higher education degree if the job requires managerial tasks, however if it only relates to the general operation of a camping, a secondary-level training may be sufficient as well.

$^2$ This might fall under: ‘turisztikai szervező, értékesítő, in terms of tasks.
4.2.2 Customer experience manager
This occupation is often referred to as guest relations manager. This is a non-regulated profession that requires general training in tourism (not specific to the occupational group).

The entry level criteria are mostly a BA in tourism and specialised brand-specific, in-house training at the employer. Employers run brand specific and multi-brand training courses for their own employees.

4.2.3 Entertainment manager
This is a non-regulated occupation that requires general training in tourism (not specific to the occupational group). Although it is a managerial position it does not necessarily require a higher education degree, if the applicant has sufficient industrial experience. However to enter the profession at a junior level a relevant higher education degree in tourism is often required.

4.2.4 Executive housekeeper
This is a non-regulated occupation that requires a specific course of training at the employer and a general training in tourism (not specific to the occupational group). Entry into this occupation is possible both with a secondary-level degree or a higher education BA degree, but professionals are further trained by the employers in-house. At large hotel chains the entry into the occupation is linked to a tertiary degree.

4.2.5 Hospitality establishment manager
This is a non-regulated profession that requires general training in tourism (not specific to the occupational group). The entry level criteria are mostly a BA in tourism.

4.2.6 Rooms division manager
This is a non-regulated profession that requires general training in tourism (not specific to the occupational group). The entry level criteria are mostly a BA in tourism or a secondary-level education with practical experience.

4.2.7 Conference and banqueting manager
This is a non-regulated profession that requires general training in tourism (not specific to the occupational group). The entry level criteria are set by the industry at a minimum of a BA in tourism.

4.3 Accommodation operatives
4.3.1 Concierge
This is a non-regulated profession that requires general training in tourism (not specific to the occupational group) at secondary, but mostly higher educational level. There used to be a specialised training course for this occupation at higher education institutions, but it does not exist anymore.
4.3.2 Entertainment officer, 4.3.3. Housekeeping supervisor, 4.3.4. Night auditor

All these occupations are non-regulated requiring general training in tourism (not specific to the occupational group) mostly at higher educational level. The requirements are different at different employers. While at multinational hotel chains all these jobs are filled with BA graduates, at small family-run accommodation providers the same occupations might require only a vocational certificate.

4.3.5 Receptionist

This is a regulated profession that requires professional qualification after formal course of training as minimum entry criteria. These courses are mostly vocational secondary-level courses run by training institutions. The vocational training is offered at training institutions outside the school system in 800-1200 hours. At most large chain hotels and hotels in towns this occupation requires a higher education degree in tourism.

4.4 Management of meetings, incentives, conferences, and exhibitions management

4.4.1 Events manager

This occupation is only regulated when the number of participants in the event exceeds 200 people (in which case it requires professional qualification after formal course of training as minimum entry criteria). It requires general training in tourism (not specific to the occupational group) mostly at higher educational level. Event management is also included in the tourism BA programme as a one-semester course.

4.4.2 Project manager Events

This occupation is not regulated, only when the number of participants in the event exceeds 200 people (in which case it requires professional qualification after formal course of training as minimum entry criteria). It requires general training in tourism (not specific to the occupational group) mostly at higher educational level.

4.4.3 Steward/Stewardess

This is a regulated profession requiring professional qualification after formal course of training after the secondary level school leaving exam. It is often extended by specialised training courses provided by the employers after recruitment.

4.5 Destination management

4.5.1 Destination management

This occupation is not regulated, but requires general training in tourism (specific to the occupational group) mostly at higher educational level. Destination managers are trained at BA in tourism courses with an additional 2 semester specialisation. Stakeholders explained that professionals in this occupational group are required to have very specific knowledge and skills and are mostly trained at master level in tourism programmes.
4.5.2 Tourism promotion/communication agent
This occupation is not regulated, but requires general training in tourism (not specific to the occupational group). It requires vocational, adult or school education in tourism.

4.5.3 Tourism promotion/communication manager (turisztikai szervező, értékesítő)
This occupation is a regulated profession requiring professional qualification after formal course of training (Pirisi, 2008). These courses are mostly vocational secondary-level courses run by training institutions. The training within the school system consists of 2 years or outside the formal school system 960-1440 hours.

4.5.4 Tourism information agent (turisztikai szervező, értékesítő)
This occupation is a regulated profession requiring professional qualification after formal course of training (Pirisi, 2008). These courses are mostly vocational secondary-level courses run by training institutions. The training within the school system consists of 2 years or outside the formal school system 960-1440 hours.

4.5.5 Tourist guide
This occupation is a regulated profession requiring professional qualification after formal course of training (Pirisi, 2008). These courses are mostly vocational secondary-level courses run by training institutions.

4.5.6 Tourism development officer
This occupation is not regulated. It requires general training in tourism (not specific to the occupational group) mostly in higher education. Jobs in this category often require a BA in tourism.

4.5.7 Sustainability manager
This occupation is not regulated. It requires general training in tourism (not specific to the occupational group) mostly in higher education. Jobs in this category often require a BA in tourism.

4.6 Tour operators
4.6.1 Tour operator manager/CEO
This occupation is a regulated profession requiring professional qualification after formal course of training. Vocational and adult training institutions provide this qualification. At managerial level it requires a higher education degree, often a BA in Tourism.

4.6.2 Tourism contract negotiator/buyer
This occupation is a regulated profession requiring professional qualification after formal course of training. Vocational and adult training institutions provide this qualification.

4.6.3 Tourism product manager
This occupation is a regulated profession requiring professional qualification after formal course of training. Vocational and adult training institutions provide this qualification.

4.6.4 Tour/holiday representative
This occupation is not regulated. It requires general training in tourism (not specific to the occupational group).

4.7 Travel agencies

4.7.1 Travel agency manager/CEO
This occupation is a regulated profession (turisztikai szervező, értékesítő, utazásügyintéző) requiring professional qualification after formal course of training. Vocational, adult training and higher education institutions provide this qualification. This occupation requires a higher education degree, a BA or MA in Tourism.

4.7.2 Tourism product manager
This occupation is a regulated profession (turisztikai szervező, értékesítő, utazásügyintéző) requiring professional qualification after formal course of training as a minimum requirement. Vocational, adult training and higher education institutions provide this qualification. In practice this occupation often requires a higher education degree, a BA in Tourism with a specialisation.

4.7.3 Travel adviser/consultant (utazásügyintéző)
This occupation is a regulated profession requiring professional qualification after formal course of training as a minimum requirement. Vocational, adult training and higher education institutions provide this qualification in 640-960 hours. In practice, this occupation often requires a higher education degree, a BA in Tourism.

4.8 Cultural, sports and recreational activities

4.8.1 Customer experience manager
This occupation is not regulated. It requires general training in tourism (not specific to the occupational group).

4.8.2 Guide/instructor
This is a not regulated profession with the exception of ‘sports instructor’ or ‘sports manager’, which is regulated. The sports instructor or sports manager occupation requires professional qualification after formal course of training as a minimum requirement. Vocational, adult training and higher education institutions provide this qualification.

4.8.3 Communication/promotion manager, 4.8.4. Product manager, 4.8.5. Sustainability manager
These are not regulated professions. They require general training in tourism (not specific to the occupational group). Vocational, adult training and higher education institutions provide this qualification.
4.9 Tourism education, research journalism and consulting

4.9.1. Tourism tutor, 4.9.2. Tourism lecturer, 4.9.3. Tourism researcher, 4.9.4. Tourism consultant, 4.9.5. Tourism journalist/writer

These are non-regulated professions that require higher education training, minimum a BA in a tourism-related field or in general management. 4.9.5. may also be practiced without a higher education degree.
5.0 PERFORMANCE OF THE SYSTEM

5.1 Gaps in Provision

Across all sectors in tourism and catering, stakeholders identified the following gaps in skills:

- Lack of practical experience
- Lack of entrepreneurial competences
- Lack of soft skills, especially deficiencies in representation, communication skills and knowledge about protocol
- Lack of up-to-date IT and digital skills

Regarding tourism-related higher education, stakeholders claimed that instead of the mandatory one-semester apprenticeship, two-semesters would be necessary. Based on the experiences of the Bologna-system so far the current BA in Tourism and Catering should be divided into a separate Tourism and a separate Catering BA as the current system cannot offer enough practical and applied knowledge especially in the field of catering (Mondok, 2014). Due to the current legislation higher education institutions are limited in the range of specialisations that they can offer under Tourism and Catering BA programmes. Employers in the different occupational groups would require more specialised knowledge than the current educational programmes offer.

New skills would be necessary to meet the demand of employers. Employers and educational institutions cooperate in the alignment of the skills and competence requirements. However in the current system strategic planning and dialogue in the sector is rather centralised around the Hungarian Chamber of Commerce and Industry. On the one hand this is good as all stakeholders are linked, however neither the dialogue, nor strategic planning is managed in a systematic way. Skills shortages are addressed in an ad hoc fashion, when legislative problems arise rather than in a long-term, planned manner. There are some good initiatives for the modernisation of the NQR, especially in the field of catering; however these initiatives are not planned on the policy-level documents to be implemented in the tourism field.

5.2 Addressing new skills and competences requirements

In the majority of the investigated occupations companies in Hungary employ people with a higher education degree. This is partly due to the fact that the level of theoretical and practical knowledge of pupils completing secondary-level vocational or adult training courses is very much undervalued by employers. Stakeholders argued that vocational courses are not practical enough and hence do not prepare pupils for work. Vocational education outside of higher education institutions is considered too low level in quality by employers. Graduates from these courses do not have sufficient foreign language competences, lack depth in their theoretical knowledge as well as in practical skills and competencies. Consequently the industry employs people with a higher education degree even for jobs that would not require a BA degree. This leads to many BA graduates ending up in low-skilled and low-paid jobs and talented people with secondary-level vocational training leaving the country and going to work in Western Europe. Stakeholders argued that most of the 6-10 months long vocational courses are ‘useless’, and hence professionals with vocational degrees are ‘missing’ from the labour market.

The skills gaps could be remedied by two parallel changes:
The improvement of the vocational education system – by introducing higher quality vocational courses that include in-depth, modernised theoretical curricula as well as up-to-date practical skills development. 

In higher education, BA courses should include more applied knowledge and practical skills as well as a stronger focus on the development of soft skills. 

Dialogue between stakeholders should be introduced in a more systemic and formalised way to encourage the information exchange in forecasting and planning as well as to address the gaps in provision. The current system does not integrate the knowledge and views of education providers and employers into the strategic planning and regulatory system and hence often ignores their experiences and demands. 

5.3 Learning outcomes 

Volumes of provision across the different investigated occupational groups meet or exceed labour market demand. In 2013 the number of graduates in vocational education in the field of hotel, catering and tourism was 10,030, while in tertiary institutions in travel, tourism and leisure 1,973 students received a degree (Ministry of Human Resources, 2013). The problem is not the volume of provision, but the quality of provision, especially in vocational training outside higher education. 

The learning outcomes in light of employer needs are considered sufficient in higher education, although soft skills and the lack of practical knowledge cause employability problems. Vocational education is less valued in light of employer’s needs. Stakeholders in industry feel that vocational education in tourism and catering is often low quality both in terms of theoretical and practical knowledge; vocational courses do not meet the requirements of industry. Employers feel that individuals are not “work-ready” when they get their qualification. As a result there is a shortfall in people with tourism-related vocational education in the sector, partly because the majority of the people with vocational qualifications do not meet the requirement of employers and partly because the minority, who would meet the requirements, go to work abroad. Tourism and catering courses are very popular, especially at tertiary level. Consequently there has been an ‘oversupply’ of highly qualified professionals in the sector in the last ten years. As a result a large number of graduates leave the sector and find work elsewhere, or become employed in jobs that do not require a tertiary level degree. 

5.4 Progression into/within employment 

Progression from vocational education into employment is difficult in Hungary. Most of the investigated occupations are not regulated, and even those that are regulated do not require tertiary-level training. However due to the large number of higher education graduates in the sector and the low quality of vocational education in general, employers demand a BA degree in most investigated occupations. Progression into employment is much easier from higher education than from vocational training, however even graduates with higher education degrees often end up in low-skilled and low-paid jobs. Progression within employment is linked to experience and work-place training. Interestingly, while in the past, many corporate managers have progressed within the industry by working their way up on the career ladder and entered the profession without formal tertiary training - today the sector prefers BA graduates and progression is linked to in-house training and specialised industry experience.
In terms of skills, entry into tourism education requires soft skills, foreign language, and IT skills as well as a certain level of general business knowledge that people with vocational education generally do not have.

Even graduates of tertiary degrees often lack soft skills, communication skills and general practical business skills. Consequently they often need to start at the lowest level in industry and by acquiring practical skills and experience, slowly work their way up on the career ladder. Employers tend to train young graduates on the job, rather than taking the value of their degree on face value.
ANNEX A: SOURCES

Interviewees

Trade Union of Hotel, Catering and Tourism:
- Dr. Zsuzsanna Várnai, Managing President
- Dr. József Mosonyi, President
- Mária Bogdánné Nánai, Vice-President

Ministry of National Economy, Deputy State Secretariat for Tourism
- Dr. András Török

Hungarian Chamber of Commerce and Industry, Directorate of Education and Training
- Anikó Kakusziné Körtvélyesi

Mercure Budapest City Center
- József Márics, General Manager

Budapest Business School, College of Commerce, Catering and Tourism
- Dr. Csilla Szalók, Head of Department

National Association of Employers in Tourism and Catering
- Lajos Böröcz, Secretary general
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