PANTOUR

PACT FOR NEXT TOURISM GENERATION SKILLS

02/24

COUNTRY SKILLS PROFILE REPORT

HUNGARY

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EXECUTIVE SUMMARY

By 2030, a generation will grow up where environmental awareness will be essential.

Objectives of the Report

The objectives of the Country Skills Profile Report are the followings:

- to provide a comprehensive overview of the Hungarian tourism in general, the tourism employment and the digital, green and social skills needed by the tourism sector
- to summarise the current situation regarding the delivery of digital, green and social skills training provision
- to analyse the online survey results held among tourism professionals, HR managers and decision makers about the gap between current levels of green, social, digital skills in the tourism and

hospitality sector and the future skills needed in 2030

- to overview the future of Hungarian tourism, of the tourism employment, the gaps between current levels of skills in the tourism industry and the projected future skills needed in 2030, by conducting interviews with key officials from the tourism industry
- to give an inventory of Best Practices in relation to upskilling, reskilling

Key Findings

According to KSH (KSH, 2022c) tourism is one of the largest sectors of the national economy, accounting for 10% of GDP (based on 2019 data), including direct and indirect (multiplier) effects, and providing employment for roughly 500,000 people (12% of the national employment). The contribution of the tourism sectors (including hospitality) to GDP is 6.4% and the number of people employed in these sectors exceeds 420 thousand (9.5% of the national employment). Among the sectors specific to tourism, hospitality employs the largest number of people, about one third of the tourism employment, approximately 140 thousand people.

The National Tourism Development Strategy 2030 highlights the issue of sustainability as a strategic direction, in accordance with international standards. It is important that tourism should be realized in harmonious coexistence with the natural environment and local communities.

In Hungary the skills of lifelong learning, openness, positive attitude, empathy, and language skills are mandatory in the tourism and hospitality training programs at different levels.

Findings from Survey

The survey shows that the most important digital skills needed in 2030 are secure information processing, the use of digital marketing systems and communication platforms and the use of office applications. Digital privacy ethics and digital business analytics are also expected to be very important, reflecting growing concerns about data security and the increasing importance of data-driven decision-making.

The environmental/green skills that are missing or have the lowest level of proficiency are technical skills that are most crucial for implementing and developing green solutions for tourist enterprises. These skills are namely: measurement and management of CO_2 emissions, use of technology to speed up the green transition and green procurement and greening the supply. Developing these skills require the most resources.

Regarding the overall responses to social-cultural skills development, it's evident that the industry recognizes the need for improvement. The future necessary levels of proficiency in 2030 are higher than the current levels in almost all skill categories. The stakeholders of the tourism sector are aware of the evolving demands of the industry, including the need to handle unexpected situations and conflicts and to effectively communicate in diverse settings. The smallest gaps are found in understanding the cultural setting of the own destination, sharing this information with guests, providing excellent customer service, communicating effectively with guests and colleagues and working effectively in a team.

According to interviewees, the technological development of the 21st century is becoming a huge challenge for tourism. It should be recognised that in order to make tourism more attractive, more efficient and economically, socially and environmentally sustainable, it is essential to use the solutions offered by the internet, location-based services, artificial intelligence, augmented and virtual reality. Among the digital skills that will be essential in the future of hospitality, interviewees mentioned programming, algorithm production. An open mind, intelligence and ability to adapt to the IT world will be required. It is clear that developing digital skills will be a business interest for the sector.

By 2030, a generation will grow up where environmental awareness will be essential. Young people are starting to understand the importance of environmental protection. Potential changes will take the form of grassroots initiatives.

Among the skills related to environmental protection, the use of renewable energy sources by service providers and in office work, as well as the demand for eco-friendly transportation methods, is expected to increase within the next 10 years. The adoption of e-buses and e-bikes is seen as a strengthening trend, and at events, reusable equipment will be used. City tour buses will be electrically powered.

According to the interviewees, among social skills, guest orientation, commitment, team-spirit, problem-solving, empathy, acceptance, tolerance are among the most important skills in the future. The most crucial aspect of guest care, in the guest-company relationship, is the ability to deal with customers from diverse cultural and religious backgrounds, and with disabilities.

All the interviewees stressed the need for lifelong learning, i.e. they expect their employees to constantly expand their knowledge and develop their skills in line with tourism trends.

Findings from Best Practices

The BPs prove that the training and further training of employees can be implemented in various forms. These solutions depend on the size of the business, the financing options, and the chances of joining international programs.

Conclusion

The findings highlight the need for significant improvements in the abovementioned skills and the existence of relevant skills gaps that need to be addressed. This could be addressed, for example, through on-the-job training and upskilling, or even mentoring schemes. Cooperation between policymakers, educators and businesses is needed to close these gaps and prepare the workforce for future challenges.

INTRODUCTION

The Erasmus+ PANTOUR Project is a European partnership for improving a collaborative and productive relationship between education and industry. PANTOUR is the follow-up project of the NTG project (Next Tourism Generation Skills Alliance; 2018-2022). The PANTOUR project aims specifically at designing innovative solutions to address skills needs in tourism.

With the exploitation of its outputs, PANTOUR seeks to benefit job seekers, employed and unemployed workers from the tourism industry, employers, SMEs, sector associations and policy makers. Therefore, it has dedicated special attention to the reskilling and upskilling of the generic workforce on future skills needs. To be able to achieve this goal, research has been conducted in every country of the project consortium, to investigate the future of tourism, skills gaps between current levels of skills in the tourism industry and the future skills needed in the future.

As a start, up to date information is needed. This will be covered with this Country Skills Profile Report: a comprehensive document, covering one country that provides an in-depth analysis of the general tourism and skills landscape, gaps, needs and workforce capabilities within a particular country. It serves as a valuable resource for policymakers, government officials, employers/employees, and educational institutions to understand the current state of skills and make informed decisions regarding workforce development strategies.

The purpose of this Country Skills Profile Report is to provide on the basis a comprehensive overview of the following:

General information of each country in the PANTOUR consortium regarding tourism and tourism employment, i.e., tourism facts & figures;

Summary of the current situation regarding the delivery of Digital, Green and Social Skills training provision for the main types of suppliers of education/training;

Analysis of online survey results within each country in the PANTOUR consortium, held among tourism professionals, HR managers and decision makers;

Overview of contemporary developments in tourism, trends in tourism employability, and the existing gaps between current levels of skills in the tourism industry and the projected future skills needed in 2030;

An inventory of Best Practices (i.e., innovative initiatives, projects, programs, philosophies, tools, methods, ideas, solutions, and concepts) in relation to upskilling, reskilling, attracting, and retaining staff in order to improve the knowledge on digital, social, and green skills development in tourism.

1. GENERAL TOURISM CHARACTERISTICS, FACTS & FIGURES OF HUNGARY

The primary aim of this chapter of this Country Skills Profile report is to elaborate on general information and give a summary of the tourism situation in the country. This is conducted by collecting and analysing data from country sources and summarising these. The analysis is built upon existing online sources, course content, reports, existing research results, articles, books.

1.1   TOURISM FACTS & FIGURES

Tourism globally

The tourism industry is a vast and complex sector that encompasses many industries, including accommodation, transport, attractions, travel companies, and more. According to the international statistics portal Statista (2023 [1]), the total contribution of travel and tourism to the global economy was $ 7.71 trillion in 2022 (Statista, 2022), a 7.6% share of the total global GDP, remaining 5% below pre-pandemic levels.

The same source (Statista, 2023 [2]) reports that the number of international tourist arrivals worldwide was 963 million in 2022.

Prior to the pandemic, Travel & Tourism was one of the largest sectors in the world and accounted for 1 in 4 jobs. Growth is expected at 5.8% annually between 2022 and 2032, outpacing the general economy.

According to another study of Statista (2023), global employment in the travel and tourism sector rose slightly in 2022 over the previous year, following a sharp drop with the onset of the coronavirus pandemic. Despite the increase, the number of travel and tourism jobs worldwide remained below pre-pandemic levels, totaling 295 million in 2022. As forecast, this figure is expected to grow to 320 million in 2023 and to 430 million in 2033.

1.1.1   Contribution of travel & tourism to GDP in Hungary

In Hungary, tourism has played a significant role in the economy for decades. Its direct contribution to GDP in the last year of the pre-Covid period, in 2019, was 8.3%. It decreased to 4% in 2020, and then in 2021, along with the increase in tourism turnover, it started to rise to 4.6% (WTTC, 2023).

The total contribution to GDP was 13% 2021 and 12% in 2022 according to the Hungarian Tourism Agency Agency (MTÜ, 2021)[1].

1.1.2   Size and relevance of the subsectors

According to data from the Hungarian Central Statistical Office (KSH), the number of commercial accommodation units (hotels, boarding houses, tourist hostels, youth hostels, holiday homes, campsites) was 3,475 in 2019. During the Covid period, this number decreased significantly by 17% due to forced closures, so that in 2020 only 2,891 units were operating. A further decrease occurred in 2021, but this resulted in a drop of less than 3% compared to the previous year, so the number of operating units was 2,827.

After the low result of the previous year, 2021 shows a 5% increase with 3058 units, but still 12% less than in 2019. In 2022, there is again a slight decrease again with 25 fewer units compared to 2021, meaning a decrease of less than 1%, and 13% compared to 2019 (KSH, 2022)[2].

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[1] Hungarian Tourism Agency (MTÜ)

[2] Hungarian Central Statistical Office (KSH)

According to KSH data, the number of catering establishments in 2019 was 51,329. As a result of Covid, there was a 3% decrease in 2020 (50,190 units). Further closures took place in 2021, so the number of catering establishments decreased by 5% to 47,924 (KSH, 2020).

In 2022, the number of units continues to fall to 46947, which means a further 2% drop (KSH, 2022a).

According to the data of the Tourism Destination Management (TDM) Association, a total of 94 registered member organisations operated in Hungary in 2019. Their number has not changed in the past period (TDM Szövetség, n.d.)[3].

According to the KSH, the number of tour-operators /travel agencies in the examined period was 1,028 in 2019, and this decreased to 1,006 in 2020. Further closures took place in 2021, so that in 2021 only 968 companies were operating (KSH, 2022b).

The range of attractions is so broad that aggregated data is not available. The most important attractions in Hungary are: spas, natural spas, museums, tourist transportation, adventure parks, zoos, amusement parks, protected natural areas, music and dance events.

In summary, it can be concluded that the closures will continue in 2022, and the economic difficulties will intensify in 2023, primarily due to the drastic increase in energy costs.

Health tourism is a special boundary between tourism and health; it is necessary to build up a workforce that sees through both at the same time characteristics of the field, professional problems. According to NTS Strategy2030 special courses should be developed as further training for professionals and employees who are working in the health tourism.

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[3]Tourism Destination Management Association (TDM Szövetség)

The courses should focus on three areas: tourism, healthcare and foreign language skills. Further training areas can be, for example, guest orientation, conflict management, sales basics, introduction of regional offerings, etc.;

- Starting and maintaining basic health training, mainly for workers in the tourism sector.
- As a result, employees (e.g. receptionists, tourist organisers) receive comprehensive knowledge about the effects and application techniques of the services they offer;
- Providing foreign language learning opportunities for health tourism workers based on the primary sending markets. Communication with foreign guests improves, which is reflected in customer satisfaction;
- Starting training and health tourism treatments related to burnout and stress management for all employees. This can reduce employee attrition.

The biggest and most comprehensive development of the Hungarian tourism industry so far is the National Tourist Information Center (NTAK), which started operating in 2019. Based on the current legislation, all accommodations of all domestic accommodation providers must be registered with NTAK. From November 1, 2021, the registration obligation extends to catering businesses and tourist attractions, and their obligation to provide data starts from 1st July, 2023. With this, NTAK will have data on the performance of all key players in the tourism sector (NTAK, n.d.).

1.1.3 Incoming and outgoing tourists

According to KSH (KSH, 2022c), Hungary has also experienced negative phenomena related to tourism: the most visited destinations (Budapest, Balaton) sometimes struggled with overtourism. In 2021, the number of incoming travels to our country increased by 16% to 36.7 million trips compared to the previous year, but it was significantly lower than in 2019, by 40%. One-day visits increased by 19% and multi-day trips by 6.9%. Compared to 2019 data, one-day trips decreased by 35%, and multi-day trips by more than half. In 2021, Hun-

garian citizens travelled abroad 13.3 million times, 4.2% more than in the period affected by the epidemic a year earlier. However, compared to 2019, the number of trips fell by 47%).

In 2022, the number of incoming travels to our country increased by 26% to 46,3 million trips compared to the previous year, but it was significantly lower than in 2019, by 25%. One-day visits increased by 17% (in 2022 compared to 2021) and multi-day trips by 60% (in 2022 compared to 2021). Compared to 2019 data, one-day trips decreased by 24% (in 2022), and multi-day trips by more than a quarter (25,4% - in 2022) (KSH, 2022d). Table1 and table2 show the distribution of foreigners visiting Hungary and the number of guest nights they spent by country.

In 2022, Hungarian citizens travelled abroad 18 million times, 35,9% more than in the period affected by the epidemic a year earlier. However, compared to 2019, the number of trips fell by 28% (KSH, 2022e).

Table 1. International visitor arrivals by countries (2009-2022) (KSH, 2022e)

	2019	2021	2022
Romania	22,4%	25,2%	18,4%
Slovakia	18%	17,2%	21,8%
Austria	15%	15,6%	16,3%
Serbia/Montenegro	6,7%	6,9%	6,9%
Germany	5,7%	6,7%	6,9%
Ukraine	4,1%	3,3%	2,2%
Poland	4%	4%	3,9%
Total	61.397.000	36.688.000	46.343.000

Table 2. International guest nights by countries (2019-2023) ([KSH](), 2023)

	2019	2021	2022	2023 (January-June)
Germany	12,8%	15,3%	12,1%	11,5%
UK	7%	3,3%	6,2%	6,9%
Czeck Rep.	6,2%	8,7%	8,2%	7,0%
USA	5,5%	N/A	N/A	N/A
Austria	5,2%	6,2%	5,8%	6,3%
Poland	4,9%	5,2%	5%	4,2%
Italy	4,4%	3,7%	3,6%	4,7%
Romania	4,2%	6,7%	6,1%	5,8%
Israel	3,3%	N/A	N/A	N/A
Total	15.753.000	5.499.000	12.364.000	5.683.000

1.1.4 Share of different transportation modes (plane, car, train) in tourism

The distribution of tourism in Hungary according to means of transport is a consequence of the special geographical situation. The country is located at the junction of international routes, its lowland location makes transportation predictable. Consequently, it provides a good connection between the Eastern and Western, as well as the Northern and Southern countries of Europe. In tourism, road transport dominates with a value approaching 90%, air transport is around 10%. Water transport accounts for less than 1%, rail 1-2% ([KSH](), 2023a).

1.1.5 Arrivals of international versus national tourists

Although the confinement caused by the epidemic and the limited possibility of travelling abroad have reduced tourism to an unprecedented extent, the domestic demand of the Hungarian population has increased significantly. This process continues to this day. According to the Hungarian National Statistic Office, the 2021 numbers of domestic tourism significantly exceeded the results of 2020 in almost all respects and approached the 2019 level. After the growth in the countryside, tourism began to increase also in Budapest. 9.4 million guests and 28.8 million guest nights were registered in commercial and private

accommodations. Three quarters of the guests came from the country, the average length of stay was 3.1 days ([KSH](#), 2023a).

1.1.6 Type of travel: business travel, consumers/leisure travel

The most important types of tourism in Hungary are the following:

- Leisure, entertainment, health care
- VFR
- Shopping
- Health care
- Additional private trips (education, religion, hunting, other private trips)
- Business, conferences

1.1.7 Company sizes

The number of gastronomic enterprises were just under 47,000 by the end of 2022 (around 1000 less than in 2021 and around 4400 less than in 2019). Among the commercial catering establishments, the number of beverage outlets and music venues decreased the most, by more than 3000 outlets (compared to 2019 and 760 less than the previous year). The number of restaurants and snack bars also fell significantly (by more than 2100 fewer outlets than in 2019), but the number of cake shops and workplace catering outlets increased slightly. Within catering outlets, commercial catering outlets represented 85%, while workplace (business and industry) catering, event catering and public catering outlets accounted for 15% (in 2022) ([KSH](#), 2023).

As of 1 January 2021, all catering establishments must be registered in one of the types of catering establishments defined in Government Decree 210/2009.

The number of catering establishments decreased by more than 3,700 between 2010 and 2019. By the end of 2021, the coronavirus epidemic had reduced the number of catering establishments by almost the same amount, to more than 3,400 fewer than two years earlier.

In 2022, this number has further decreased to nearly 4400 compared to 2019 (KSH, 2023).

In 2021, the hospitality sector was home to 12.1 thousand self-employed and 13.7 thousand partnerships. 61% of the self-employed worked in restaurants and mobile catering and 31% in beverage service activities the food service sector. The share was 76% for restaurants and mobile food service activities and 16% for beverage service activities (Zerényi, 2023). Almost all (99.9%) of the 25 thousand catering partnerships and self-employed persons were in the SME sector. The share of SMEs in the hospitality sector was 91% for micro enterprises, 8.6% for small enterprises and 0.5% for medium-sized enterprises in 2021 (Zerényi, 2023).

Table 3. Number of active enterprises in 2020 (KSH, 2023b; Zerényi, 2023)

Period	TEÁOR08	Category	Total category of enterprise	Self-employed	Partners hip	Non-profit organisation
2020	56= Catering	Total	25624	12315	13298	11
		of which SMEs	25614	12315	13288	11
	561=Restaurant and mobile catering	Total	17267	7295	9970	0
		of which SMEs	17264	7223	9967	0
	563=Beverage service	Total	6226	3985	2240	0
		of which SMEs	6226	3985	2240	0
	562= Event catering and other food service activities	Total	2198	1067	1123	8
		of which SMEs	2190	1067	1116	8
	5621 Event catering	Total	453	298	154	0
		of which SMEs	453	298	154	0
	5629 Other food service activities	Total	1745	769	969	7
		of which SMEs	1737	769	962	7

Table 4. Number of active enterprises in 2021 (KSH,2023b ; Zerényi, 2023)

Period	TEÁOR08[4]	Category	Total category of enterprise	Self-employed	Partnership	Non-profit organisation
2021	56= Catering	Total	25810	12055	13742	13
		of which SMEs	25800	12055	13732	13
	561=Restaurant and mobile catering	Total	17823	7343	10478	2
		of which SMEs	17819	7343	10474	2
	563=Beverage service	Total	5875	3684	2190	1
		of which SMEs	5875	3684	2190	1
	562= Event catering and other food service activities	Total	2112	1028	1074	10
		of which SMEs	2106	1028	1068	10
	5621 Event catering	Total	411	274	136	1
		of which SMEs	411	274	136	1
	5629 Other food service activities	Total	1701	754	938	9
		of which SMEs	1695	754	932	9

[4]TEÁOR08 - Standard industrial classification of economic activities (Gazdasági tevékenységek egységes ágazati osztályozási rendszere): The Standard Industrial Classification of Economic Activities is the Hungarian version of the EU's classification of economic activities, NACE Rev.2. Based on Regulation (EC) No 1893/2006, TEÁOR'08 will be used from 1 January 2008 to define the main activity of enterprises, to calculate economic and social indicators and to publish statistical data.

1.2 TRAVEL AND TOURISM'S CONTRIBUTION TO EMPLOYMENT

Tourism is one of the largest sectors of the national economy, accounting for 10% of GDP (based on 2019 data), including direct and indirect (multiplier) effects, and providing employment for roughly 500,000 people (12% of the employed). The contribution of the tourism sectors (including hospitality) to GDP is 6.4% and the number of people employed in these sectors exceeds 420 thousand (9.5% of the employed). Among the sectors specific to tourism, hospitality employs the largest number of people, about one third of the tourism employment, approximately 140 thousand people. In 2020, the year hit by the COVID-19, preliminary data show that the direct contribution of the tourism sector to GDP fell to 5.1% and the multiplier contribution to 8.1% (KSH, 2023a).

Figure 1 shows the development of the number of employees in the accommodation and hospitality sector between 2019-2021 In the accommodation and food service activities (I) sector, 170 thousand persons were employed in 2021 (75% of them in hotels and restaurants), which accounted for 3.7% of the national economy as a whole. In 2021, the number of persons employed in industry (I) was 4.3% lower than in the previous year (177 thousand) and 12.4% lower than in 2019 (193 thousand) due to the negative impact of the coronavirus epidemic. The number of people employed in the national economy as a whole increased by nearly 1% compared to 2020 (Zerényi, 2023).

Figure 1. Number of persons employed in accommodation and food service activities (2019-2012) ([KSH](#), 2023a; [Zerényi](#), 2023)
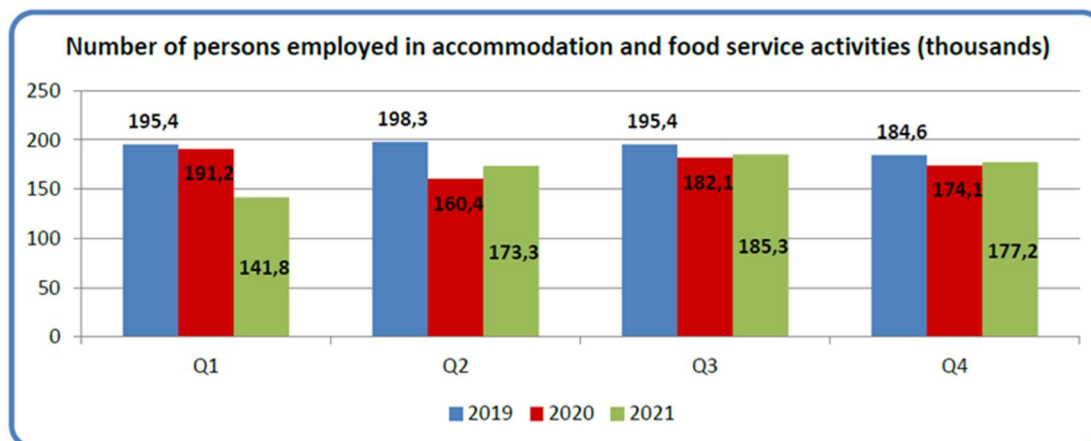
1.3 DIRECT AND TOTAL CONTRIBUTION OF TOURISM TO GDP IN 10 YEARS' TIME

The Hungarian government adopted the National Tourism Development Strategy in 2017, which defined the framework in which the state and the market jointly think about the future of tourism in Hungary until 2030. As a result of Covid-19, the strategy was reviewed. The time frame of the Tourism 2.0 document, as well as its goals, remain unchanged. It sets out the necessary development and sector management tasks until 2030, in order to increase the direct and indirect contribution of Hungarian tourism to GDP to 16 percent by 2030 ([MTÜ](#), 2021).

According to the Hungarian Tourism Agency the total contribution of tourism to the GDP was 12% in 2022 ([MTÜ](#), 2023).

1.4 DIRECT AND TOTAL CONTRIBUTION TO EMPLOYMENT IN TOURISM IN 10 YEARS' TIME

The labour market data of the tourism sector is currently incomplete and heavily distorted by the "grey" economy. According to the *National Tourism Strategy 2030*, in 2017 the number of jobs in the tourism sector was 428,000, 10.0% of the jobs were directly generated by tourism, and tourism accounts for 13.2% of employment in the national economy when the direct and indirect effects are combined. In 2019, 419,000 people were employed in the tourism and hospitality sector, which was 9.5% of total employment.

After the COVID-19 pandemic, the number of employed people decreased significantly: in the subsectors of accommodation and catering, 193.4 thousand people were employed in 2019, 177 thousand in 2020, and 169.4 thousand in 2021.

From the data, it can be concluded that the proportion of vacant positions in the accommodation service and hospitality sector is still significant, i.e. even after the reopening after the pandemic, a labour shortage must be expected in the sector (KSH, 2023a).

One of the goals of NTS 2030 and Tourism 2.0 is to increase the direct and indirect contribution of Hungarian tourism to GDP to 16 percent by 2030. Based on this, the workforce required in 2030 can be estimated at 600,000 (MTÜ, 2021).

1.5 MAIN FOCUS POINTS OF NATIONAL STRATEGY FOR TOURISM

With the revision of the National Tourism Development Strategy 2030, the Hungarian Tourism Agency developed the *Tourism 2.0* document. The purpose of *Tourism 2.0* is to present the intervention points identified during the review of the National Tourism Development Strategy 2030, new sectoral approaches,

document presents the development opportunities in relation to the current situation of tourism and hospitality through 12 guidelines and takes a series of actions related to them. Tourism 2.0 also focuses on the areas of Hospitality, MICE, Health Tourism, Religious Tourism, and Sales, which areas have significant development reserves.

The horizontal goals of NTS2030 remained and have been expanded: the demand orientation, the ecosystem-level cooperation, the family-friendly approach and digitization appear in a comprehensive way in the Strategy. The formation and structured development of sector-specific digital competences and capabilities must fit the new into its concept.

NTAK's functions and user base are continuous expansion necessitates the system-related continuation of training courses. In conducting this effectively the Hungarian Tourism Agency wants to rely more and more on for distance learning webinars and online forums widely used as a result of the epidemic crisis, organising them around practical questions, combined with a live demonstration of online solutions.

The Hungarian Tourist Association Foundation founded in 2019 the CheckINN, which is an umbrella brand and innovation hub having been extended with the creation of the "CheckINN DIGITAL" application and prize. The purpose of the annual competition is to recognize successfully implemented projects of those tourism enterprises that are at the forefront of sector digitization and encourage the innovative thinking.

The Tourism 2.0 Strategy highlighted the issue of sustainability as a strategic direction, in accordance with international standards. It is important that tourism should be realised in harmonious coexistence with the natural environment and local communities.

1.6 COUNTRY-SPECIFIC CHALLENGES AND DEVELOPMENTS IN TOURISM

The *Tourism 2.0 Strategy* - the national tourism development strategy until 2030- defines the following goals:

The most important types of tourism in Hungary are the following:

- Destination products design
- Digital development of the sector
- Extensive sustainability
- Visitor-oriented developments
- Dedicated, well trained professionals

The following sub-goals are formulated in relation to workforce development:

1. Implementation of a comprehensive Strategic Resource Planning covering the entire sector, which takes into account the workforce related to its quantity and quality current and future needs.
2. The development of practical training is justified in tourism-related vocational
3. In order to raise the standard of higher education, Hungarian Tourism Agency takes a more active role in dual courses and in the improvement the quality of tourism higher education.
4. To ensure the continuing education for those working in tourism by widening the opportunities and providing quality training to the workforce
5. Increasing the attractiveness of a tourism career is also an essential step for stabilising the labour market.

2. CURRENT SKILLS TRAINING DELIVERY IN HUNGARY

In this chapter, you will find an overview of the training delivery of digital, green and social skills sets in HUNGARY. This is conducted by collecting and analysing data from country sources and summarising these.

2.1 DIGITAL SKILLS

There are many training courses in Hungary related to the development of digital skills. The university-level courses (Computer Science, Engineering Informatics BSc and MSc) mainly focus on programming and IT security, the courses launched by private companies cover one sub-field each.

In the case of tourism and hospitality courses, among the digital skills, basic computer user knowledge, presentation techniques, social media knowledge and knowledge of one or two special reservation software are mandatory in the training program. However, it happens that the software used in education is not the latest version, so it is a difficulty. The software used by international hotel chains is acquired by the employees in the internal training of the respective hotels.

CheckINN is Hungary's first tourism innovation HUB, which aims to catalyse innovative initiatives in domestic tourism. The innovation management platform, originally aimed at university students, was launched in 2019 by the Hungarian Tourism Association with the aim of supporting initiatives that are creative and innovative in tourism, as well as to promote value creation and relationship building in the sector.

Within the framework of the competition announced every year, three-person teams of higher education students can present their innovative ideas.

The organisers pay particular attention to Green innovation solutions, Digital and IT innovation, as well as Service/product and Marketing development. In Hungary, the organisations managing tourism (NGOs and organisations operating in the form of associations) are actually governmental bodies. That is why it is difficult to group training courses according to the information provided.

2.2 GREEN SKILLS

In Hungary, environmental awareness is becoming more and more decisive in more and more areas of life. The sensitivity to environmental issues is growing, people keep this in mind not only in their everyday life, but also in their free time.
All this is also reflected in educational programs at different levels. However, it is not possible to acquire all the skills related to the subject with the help of a single training program.

This is especially true for tourism and hospitality courses. The interpretation of sustainability is included as a mandatory element in university and secondary school training programs. However, apart from the general findings (goals, conditions), it is not possible to deal with the topic in a larger number of hours. The best-known GREEN certificate is the Green Hotel program for hotels announced yearly by the Hungarian Hotel and Restaurant Association.

Another initiative is the CheckINN Green tender which was announced by the Hungarian Tourist Association Foundation and the Hungarian Tourist Agency for tourism businesses and organisations that think and act in a socially responsible manner. The 2021 year's competition was entitled "We travel green", and in addition to the main prize, the professional jury also awarded a special prize. Based on the jury's decision, the main prize went to the Katica Tanya Experience Center, which is located in Patca, Zselic. The tourism concept was dreamed up in such a way as to be present on the tourism market as an experience-oriented service provider that revives the close-to-nature and traditional lifestyle and promotes active rest. In the future, they will only develop

attractions that do not consume energy, or if they do, we will produce it ourselves from renewable sources. With the special award the jury recognized an innovative, imaginative initiative that promotes sustainable tourism and environmentally conscious thinking with a simple idea and the involvement of the larger community. The winner of the special award is the **Bögretúr program** of the **Túrajó company** that organises sightseeing walks in Veszprém.

Regarding public catering, a new regulation stipulates what the catering short supply chain is, and that at least 60% of the total value of the purchased products must come from products procured in the catering short supply chain or from local food products as of January 1, 2022. From January 1, 2023, this figure will change to at least 80%. Catering companies carry out corresponding internal training.

In the tourism-hospitality sector the large hotel chains (e.g. Danubius Hotels, Mellow Mood Hotels) have developed their own "green" certification (e.g. Danubius Care Programs, Mellow Mood Environmental Certification) and are launching related internal training.

In the tourism and hospitality sector, environmental issues appear much more prominently on the demand side than on the supply side. There would definitely be a need for a complex representation of environmental aspects in the training programs, including climate change and carrying-capacity analysis.

Several Hungarian tour operators or tourist agencies participate in the Tourban project. Tourban is an EU-funded project that supports urban tourism SMEs in becoming more competitive and more sustainable – not only from an environmental, but also from an economic and social point of view. Tourban brings together eight partners from seven European cities: Amsterdam, Barcelona, Budapest, Copenhagen, Dubrovnik, Kiel, and Tallinn. Project's partner in Hungary is VIMOSZ. Tourban provides tourism SMEs with the skills, capacity, and financial resources they need to become catalysts for innovation and sustainability.

This way, they will be able to reduce costs and resource consumption, and to increase their revenue streams through an improved visibility and positioning. Tourban also helps the SMEs to receive a Travelife award. Travelife is a fair and affordable system that helps tour operators and travel agencies to manage and improve social and environmental impacts by complying with sustainability criteria.

In Hungary, the organisations managing tourism (NGOs and organisations operating in the form of associations) are actually governmental bodies. That is why it is difficult to group training courses according to the information provided.

2.3 SOCIAL/CULTURAL SKILLS

In tourism, hospitality and the positive attitude of employees have a direct impact on guest satisfaction. Sometimes even infrastructural deficiencies can be eliminated with the positive attitude and kindness of tourism professionals and employees. In addition to professional knowledge, social skills are also very important elements of human resources. In Hungary the skills of lifelong learning, openness, positive attitude, empathy, and language skills are mandatory in the tourism and hospitality training programs at different levels.

Company trainings usually focus on the development of management skills. Studying the training offer, it can be concluded that even more emphasis should be placed on teamwork, protocol, sensitization and the development of language skills in the tourism sector.

In Hungary, according to the NTS 2030 Training initiatives are at the centre of the development of the tourism labour market. It is necessary to improve adult training by developing training content and encouraging companies to take part in training. In addition, the attractiveness of the tourism career must be increased: in this way, talented young people will be on the field and will stay there throughout their careers.

The main goals of the strategy are:

- A balance must be created between tourism training levels.
- In order to correct the asymmetry between tourism shortage professions and labour market supply, it is justified to optimise the number of students participating in level courses.
- In order to ensure the future stability of the industry, it is also necessary to renew the content of the trainings based on future trends

According to the NTS 2030 strategy, iit is recommended to speed up the implementation of the strategy, considering that based on the results of the Next Tourism Generation project - also presented in the strategy-, there are some jobs in the tourism-hospitality sector where digital, green and social skills will become more and more necessary within ten years, but which do not necessarily have priority today.

The most important guidelines are:

- There is a need to develop practical training in secondary and higher education in tourism and hospitality.
- It is necessary to expand further training opportunities for tourism workers
- For stabilising the labour market it is essential to Increase the attractiveness of a tourism career

3. SURVEY RESULTS

In this chapter, an analysis is provided of the online survey results within HUNGARY, held among tourism professionals, HR managers and decision makers. This survey aimed to investigate the gap between current levels of (green, social, digital) skills in the tourism industry and the future skills needed in 2030 – resulting in quantitative data about the skills gaps and future needs. In summary:

- Key trends are extracted from the survey results of HUNGARY to establish how the sector is responding to the skill sets, highs, lows, current and future level of proficiency in Green, Digital and socio-cultural skills sets.
- An explanation and discussion of the results is provided.
- Gaps are indicated in the current and future level of proficiency in Green, Digital and Socio-cultural levels of proficiency. Comments are made on specific shortages or excellent/good proficiency in different skills and the areas of significant weakness.

Total number of responses in Hungary	73
Number of responses per tourism sub sector:	
Destination management organisations:	1
Accommodation providers:	36
Food & Beverage:	11
Visitor attractions:	3
Travel agents and tour operators:	9

3.1 DIGITAL SKILLS

Digital Skills	
Current existing level of proficiency	**Highest:** 1. 3,75 Use of office applications (text processing, spreadsheets, presentation software) 2. 3,6 Use of digital marketing systems and communication platforms (social media networks, e-mail and direct marketing systems, content management systems) 3. 3,47 Secure information processing (backing-up, cybersecurity, data protection) 4. 3,41 Digital privacy and ethics 5. 2,92 Web & app development & programming **Lowest:** 1. 1,33 Use of robots 2. 1,4 Use of generative AI applications (e.g. ChatGPT, Midjourney, DALL-E, etc.) for generating text and visuals. 3. 1,78 Use of digital technologies to create guest experiences (e.g., for Virtual- and Augmented Reality) 4. 2,69 Digital business analysis, business intelligence, data-driven decision making
Future necessary level of proficiency in 2030	**Most necessary:** 1. 4,68 Secure information processing (backing-up, cybersecurity, data protection) 2. 4,67 Use of digital marketing systems and communication platforms (social media networks, e-mail and direct marketing systems, content management systems) 3. 4,55 Use of office applications (text processing, spreadsheets, presentation software) 4. 4,51 Digital privacy and ethics 5. 4,38 Digital business analysis, business intelligence, data-driven decision making **Least necessary:** 1. 2,56 Use of robots

	2. 2,99 Use of generative AI applications (e.g. ChatGPT, Midjourney, DALL-E, etc.) for generating text and visuals. 3. 3,37 Use of digital technologies to create guest experiences (e.g., for Virtual- and Augmented Reality) 4. 4,21 Web & app development & programming
Skills gaps between existing and future level of skills sets	**Largest gaps:** 1. 1,59 Use of generative AI applications (e.g. ChatGPT, Midjourney, DALL-E, etc.) for generating text and visuals 2. 1,59 Use of digital technologies to create guest experiences (e.g., for Virtual- and Augmented Reality) 3. 1,49 Digital business analysis, business intelligence, data-driven decision making 4. 1,29 Web & app development & programming 5. 1,23 Use of robots **Smallest gaps:** 1. 0,8 Use of office applications (text processing, spreadsheets, presentation software) 2. 1,07 Use of digital marketing systems and communication platforms (social media networks, e-mail and direct marketing systems, content management systems) 3. 1,1 Digital privacy and ethics 4. 1,21 Secure information processing (backing-up, cybersecurity, data protection)

In Hungary in the domain of digital skills, the survey reveals significant disparities between current skill levels and those projected to be required by 2030. Presently, proficiency in established digital skills such as office applications (3.75), digital marketing systems (3.6), and secure information processing (3.47) is relatively high. However, the knowledge about emerging digital technologies, such as robots (1.33), artificial intelligence (1.4), and digital technologies for

guest experiences (1.78), remains notably low. The existing skills are predominantly centred on fundamental digital tools and communication.

Despite the current proficiency levels, the survey shows that the future skills needed in 2030 are no longer dominated by the gaps of the past, with secure information processing (4.68) being the most needed skill, followed by digital marketing systems and communication platforms (4.67) and the use of office applications (4.55). Digital privacy and ethics (4.51) and digital business analytics (4.38) are also expected to be very useful, reflecting growing concerns about data security and the increasing importance of data-driven decision-making.

More surprisingly, robots (2.56) and the use of generative AI applications (2.99) are on the list of least needed, and also on this list is the use of digital technologies to create guest experiences, which also ranks third (3.37).

The gap between current and future proficiency levels shows that the use of new technologies is still the most needed. The most significant gap is in the use of AI and in the use of digital guest experience technologies (both with 1,59), followed by the digital business analysis, business intelligence and data-driven decision making (1,49), web & app development & programming (1,29) and the use of robotics (1,23).

The smallest differences are, unsurprisingly, in use of office applications (0,8), digital marketing and communication systems (1,07), digital privacy and ethics (1,1) and secure information processing (1,21), suggesting that some basic skills are already in place.

The proficiency level varies according to evolving technology trends and business needs. For example, the high demand for secure information processing reflects the growing threat and need for data protection. Generative AI applications, while less critical today, are likely to transform a range of industries, including content creation, creative arts and customer service. The

declining importance of web- and application development skills can be attributed to the development of low-code platforms, which allow people with limited programming skills to create software applications (Gartner, 2022).

The data highlights the need for significant improvements in digital skills and the existence of relevant proficiency levels' gaps that need to be addressed. This could be addressed, for example, through on-the-job training and upskilling, or even mentoring schemes. Cooperation between policymakers, educators and businesses is needed to close these gaps and prepare the workforce for future digital challenges. It's encouraging that the small gaps in existing skills suggest that some basic skills are well established, providing a basis for building new competences.

3.2. GREEN/ENVIRONMENTAL SKILL SETS

Green Skills	
Current existing level of proficiency	**Highest:** 1. 3,21 Understanding of environmental laws and regulations 2. 2,97 Efficient use of resources (e.g., energy, water, materials) 3. 2,92 Promotion and encouragement of sustainable practices among guests 4. 2,89 Adoption of environmental certifications and management systems 5. 2,81 Measurement and management of waste **Lowest:** 1. 1,88 Measurement and management of CO2 emissions 2. 2,44 Use of technology to speed up the green transition 3. 2,58 Green procurement and greening the supply chain (working with green suppliers) 4. 2,64 Communication about the organisation's efforts towards a green economy 5. 2,66 Green marketing and product development
Future necessary level of proficiency in 2030	**Most necessary:** 1. 4,47 Efficient use of resources (e.g., energy, water, materials) 2. 4,37 Understanding of environmental laws and regulations 3. 4,36 Promotion and encouragement of sustainable practices among guests 4. 4,21 Communication about the organisation's efforts towards a green economy 5. 4,19 Green procurement and greening the supply chain (working with green suppliers) **Least necessary:** 1. 3,58 Measurement and management of CO2 emissions 2. 4,03 Use of technology to speed up the green transition 3. 4,04 Adoption of environmental certifications and management systems 4. 4,1 Green marketing and product development

	5. 4,16 Measurement and management of waste
Skills gaps between existing and future level of skills sets	**Largest gaps:** 1. 1,70 Measurement and management of CO2 emissions 2. 1,61 Green procurement and greening the supply chain (working with green suppliers) 3. 1,59 Use of technology to speed up the green transition 4. 1,57 Communication about the organisation's efforts towards a green economy 5. 1,50 Efficient use of resources (e.g., energy, water, materials) **Smallest gaps:** 1. 1,15 Adoption of environmental certifications and management systems 2. 1,16 Understanding of environmental laws and regulations 3. 1,35 Measurement and management of waste 4. 1,44 Green marketing and product development 5. 1,44 Promotion and encouragement of sustainable practices among guests

According to the survey the skill with the highest level of proficiency is the understanding of environmental laws and regulations (3.21). Understanding and staying updated on the development of these laws is a valuable skill. Due to its high level of proficiency this skill has the smallest skills gap (1,16). Currently, the second most developed skill is efficient use of resources (2,97). Considering the maintenance prices skyrocketed during winter this skill was the first and most worthwhile step to keep the costs of the enterprises at a bearable level. This was echoed in one of our personal interviews as well, who belonged to the accommodation provider sector. In the future, this skill will be in high demand, and the skill gap is 1.5, indicating the need for further development in this area. This is not only due to climate change, but future demand drivers (tourists will choose between accommodations based on their level of sustainability) will also have a major impact on the need for this skill.

The skill that achieved the third highest level of proficiency is the promotion and encouragement of sustainable practices among guests (2,92). It is extremely important to not only implement sustainable solutions but to share achievements and encourage others to change their life for the better. Therefore, this skill is essential to have. On the contrary, there are more important skills to be obtained than this from a sustainable development perspective.

Unfortunately, the skills that are missing or have the lowest level of proficiency are technical skills that are most crucial for implementing and developing green solutions for tourist enterprises. These skills are namely: measurement and management of CO_2 emissions (1,88), use of technology to speed up the green transition (2,44) and green procurement and greening the supply (2,58). Developing these skills require the most resources. Although, the skills have the largest skills gap, the necessity of these skills in the future for enterprises are some of the lowest.

3.3 SOCIAL AND CULTURAL SKILL SETS

Social-cultural skills	
Current existing level of proficiency	**Highest:** 1. 3,84 Provide excellent customer service 2. 3,82 Communicate effectively with guests and colleagues 3. 3,77 Understand the cultural setting of the own destination and share this information with guests 4. 3,71 Adaptability to change and handle unexpected situations 5. 3,71 Work effectively in a team **Lowest:** 1. 3,36 Support diversity, equality and inclusivity 2. 3,38 Communicate effectively with guests in their native language 3. 3,47 Resolve conflicts 4. 3,48 Communicate and interact with people from different cultural and social backgrounds
Future necessary level of proficiency in 2030	**Most necessary:** 1. 4,74 Adaptability to change and handle unexpected situations 2. 4,71 Communicate effectively with guests and colleagues 3. 4,7 Provide excellent customer service 4. 4,6 Work effectively in a team 5. 4,45 Resolve conflicts **Least necessary:** 1. 4,29 Support diversity, equality and inclusivity 2. 4,33 Communicate effectively with guests in their native language 3. 4,29 Understand the cultural setting of the own destination and share this information with guests 4. 4,44 Communicate and interact with people from different cultural and social backgrounds
Skills gaps between existing and future level of skills sets	**Largest gaps:** 1. 1,03 Adaptability to change and handle unexpected situations 2. 0,98 Resolve conflicts 3. 0,96 Communicate and interact with people from different cultural and social backgrounds

4.   0,95 Communicate effectively with guests in their native language
5.   0,93 Support diversity, equality and inclusivity

Smallest gaps:
1.   0,65 Understand the cultural setting of the own destination and share this information with guests
2.   0,86 Provide excellent customer service
3.   0,89 Communicate effectively with guests and colleagues and
4.   0,89 Work effectively in a team

In terms of the level of proficiency in social-cultural skills it is evident that the level of proficiency is considered higher than others both currently and in the future. For instance, *Provide excellent customer service* and *Communicate effectively with guests and colleagues* are rated the highest in current proficiency, with scores of 3.84 and 3.82, respectively. These skills are crucial for creating a positive guest experience and fostering a productive work environment, explaining their high importance.

On the other hand, a bit low in current proficiency are the skills *Support diversity, equality, and inclusivity* (3,36) and *Communicate effectively with guests in their native language* (3,38). These skills do not differ much from the previous highest rated skills score, and the current existing level of proficiency is probably already considered acceptable among Hungarian tourism professionals.

Regarding the overall responses to social-cultural skills development, it's evident that the industry recognizes the need for improvement. The future necessary levels of proficiency in 2030 are higher than the current levels in almost all skill categories. This suggests that stakeholders in the tourism sector are aware of the evolving demands of the industry, including the need to handle unexpected situations and conflicts and to effectively communicate in diverse settings. Adaptability to change and handle unexpected situations tops the list with a score of 4.74, indicating its increasing significance.

This shift could be attributed to the ever-changing nature of the hospitality industry, especially considering global events like the COVID-19 pandemic, which highlighted the need for adaptability (Zerényi, 2023; Kozma, 2021).

The required level of proficiency of the other skills received similar ratings, which means that there is a need to put more emphasis and focus on these skills in the Hungarian tourism sector.

After examining the largest skills gaps, it can be said that the skills listed above are crucial in the tourism industry as they directly impact the quality of the guest experience and the ability to navigate diverse and dynamic environments. Even so, the skills gap rate is still low, ranging from 0,93 to 1,03, and can be reduced even further with a minimum of effort.

The smallest gaps are found in understanding the cultural setting of the own destination, and sharing this information with guests (0,65), providing excellent customer service (0,86) and communicating effectively with guests and colleagues and working effectively in a team (0,89). While these skills are essential, the relatively smaller gaps may indicate that they are more developed among current workers, highlighting their importance in the industry.

In summary, the data clearly reflect that Hungarian tourism professionals prioritise social-cultural skills and their development. As the industry evolves, adaptability, effective communication and conflict management are becoming increasingly important. Understanding trends and addressing gaps will be essential for the success of the sector in Hungary.

4. EXPERT INTERVIEW RESULTS

In this chapter, the results are presented of the semi-structured interviews that have been held with experts in tourism in HUNGARY. With these interviews, we are seeking more detailed knowledge and fresh insights regarding trends in tourism, in tourism employment and in the development of Digital, Green, Social and Cultural skills in tourism. Semi-structured interviews are an appropriate tool for this purpose, since they allow for new understandings and thoughts to surface during such interviews, which further facilitate participants' responses and elaborations.

In total, 18 interviews have been held, equally divided over the five tourism sub sectors (3 travel agents/tour operators, 4 destination management organisations, 3 visitor attractions, 4 accommodation providers and 4 food & beverage providers. Interviewees were senior managers; human resource managers; company owners; entrepreneurs; heads of department.

4.1 THE FUTURE OF TOURISM AND TOURISM EMPLOYMENT

4.1.1 INTRODUCTION

Several societal megatrends - already visible today but with their full impact still unknown - are heavily influencing the future of tourism. Demographic developments - the continued growth of the global middle class, increasingly elderly tourists, digital natives coming of age and entering the travel market, more Asian tourists - will result in additional and diverse tourist preferences and choices. Technological innovations (AI, robotization, virtual and augmented reality, etc.) will continue to impact tourism and transform business models, jobs in tourism and tourist experiences.

Social developments (Covid and health issues, migration, economic uncertainty, uproar and wars) will also have their impact on tourism. The inclusion of more sustainable practices is also a widely debated topic in the consumption, production, and development of tourism.

Looking at developments in employment, the tourism and hospitality sector has special characteristics: e.g., working on weekends and holidays, multiple shifts, seasonal work, etc. These atypical forms of employment include a variety of work contracts (e.g., temporary work, part-time work, temporary agency work and other multi-party employment arrangements).

In order to keep pace with all these developments, the tourism sector needs to be prepared for these changes: to transform the tasks expected by employers into new jobs, thereby making the jobs attractive to future employees and offer them career perspectives.

In this section, we aim to get an overall understanding of the interview participants' ideas of the evolution of the tourism sector, tourism employment and the emergence of new job profiles – in tourism in general and specifically in relation to the own organisation, in about seven years' time.

Questions that have been discussed with participants were the following:

- What will the sector and your organisation and the sector look like around 2030? Which new changes do you perceive could occur in your business?
- What impact do the current megatrends and crises (Covid-19 / health; Ukraine War; migration; demographics; environment and climate; energy; cost-of-living) have on employment in your organisation and how does your organisation deal with the consequences of these crises?
- What kind of people will be working in your organisation around 2030? Will there be a significant increase/decrease in the number of employees? And if so, how are these employees different from your current workers?
- How is your organisation changing the tasks that will be required into new job profiles?

- The above-mentioned developments have also transformed the way people work. New concepts such as working from home (WFH); digital nomads; hybrid working; workations; remote working; etc. have emerged or intensified. Which work forms are you now experiencing in your organisation and what effect does this have on recruiting new personnel?
- How does your organisation deal with societal developments such as diversity, inclusion, and flexibility within the recruitment process?
- Which new job profiles do you see emerging in your organisation in the next seven years (2030) and why? Which new job positions will emerge and/or will be 'copied' from other sectors?

4.1.2 RESULTS FROM THE INTERVIEWS

Trends of tourism development in Hungary

According to interviewees, it is difficult to predict how tourism will develop in Hungary by 2030. Covid has shown that unexpected events can completely paralyse the sector in a short time. At the moment, high inflation, the decline in the savings of the Hungarian society, and the weak Forint are not favourable for domestic tourism. Inbound tourism is dominated by low-cost flights and demand from people arriving in Budapest for a few days. American and Asian tourists are absent.

One of the reasons for the weak domestic tourism figures is that, alongside inflation, accommodation booking patterns in Hungary have changed and increasingly slipped to the last minute. Under these circumstances, the Hungarian population - if they have savings - prefer to choose a foreign destination instead of a domestic one, which is often cheaper than a holiday in Hungary. Consequently, domestic destinations in Hungary suffer from a lack of domestic tourists, while Budapest, the number one destination for foreign visitors, suffers from the arrival of tourists with a lower propensity to spend.

These phenomena have an impact not only on the turnover of hotels but also on the turnover of restaurants: the spending capacity and the number of domestic guests with the ability to pay are decreasing. In recent years, many restaurants have been forced to close. There has been a trend outlining the temporary closures, reduced opening hours, and reduced services and offerings towards the end of last year and the beginning of this year.

Interviewees highlighted the negative phenomenon of the reduction in the number of large events. This finding applies to congress events. On the positive side, however, Budapest hosted in 2023 one of Europe's best summer music and cultural events, the Sziget Festival, and for the first time the World Athletics Championships.

The interviewees also touched on sustainability issues for the future of tourism. At the moment, they see that corporate partners and the internal life of the company are increasingly focusing on green considerations. Despite this, choices are not made based on transport, accommodation, and tour operators. This is true for both domestic and foreign partners and customers, although the latter are increasingly asking for information on, e.g., carbon emissions. So, we can say that environmental awareness is increasing, but it does not play a decisive role in the choice between service providers.

Travellers themselves almost never indicate a need for sustainability, choosing the cheapest or most comfortable flight, for example, is the most common. The main requirement for conference travellers is that accommodation should be in or very close to the conference venue. At the end of the event, they want to return home immediately, so they prefer the earliest flight.

Labour situation in the sector
According to interviewees, the labour situation in the tourism and hospitality sector in Hungary is still not without problems. The labour shortages in the pre-pandemic period were demographic, exacerbated by the fact that during the Covid, tourism businesses received no or delayed support to help them retain their staff.

Thus, former workers who found new jobs in other sectors (construction, retail, courier, SSC) during the pandemic and were satisfied with their new position (time off, predictable work schedule, adequate income) did not return to the tourism and hospitality sector after the pandemic. It is difficult to plan even for six months, let alone several years.

There is a significant loss of confidence in the labour market in the sector. The extent varies from employer to employer, but the general perception is that the social safety net was less effective here. This leads to further counter-selection. An even bigger problem is that there are also 'interchangeable' specialised skills in our sector (HR, IT, marketing, shift, front office), where there is wage competition and the tourism and hospitality companies are not competitive with banks, insurance companies, and industry.

During and after COVID-19, on the other hand, many people left the sector for age reasons, a layer of the profession has disappeared, and their knowledge is lacking, so there are few people left who can pass on this knowledge. There are still some for 5-10 years, and this should be very much exploited in the coming years.

It is a positive phenomenon that tourism services are constantly expanding in Hungary, and there are more and more new or renovated and expanded accommodation facilities in tourist regions, which increases the demand for labour. However, resources are finite. During the interviews, it was repeatedly mentioned that the number of foreign workers is increasing out of necessity and that most of them arrive without language skills, which requires a high degree of adaptation and makes it difficult to strengthen the team spirit in the workplace.

All the interviewees stressed the need to recognize that young people's choice of jobs is influenced by new factors, with the priority of "wanting to feel good" in their workplace. Work-life balance, a predictable career path, and, of course, a decent, competitive income are also important for them.

The interviewees highlighted the following changes in the workforce:

- As travel habits change, more and more services are being purchased using smart devices. In addition, tourists can get the necessary up-to-date information through them (often in their language), without the need for a receptionist in the traditional sense. This is a major change in the front office area.

- The growing proportion of women in the tourism and hospitality sector means that there are additional challenges to be met: for example, night shifts used to be exclusively male, but this is now impossible, and women are often absent from work for long periods when they start families and are unable to return because of their changed circumstances.

- For decades, the tourism and catering sector has been characterised by a classic hierarchy. Nowadays, and even more so in the future, this relationship is evolving into a partnership based on the adaptation of different age groups to each other. In this context, it has been said that "we, the 50+ generation, are the first generation to learn not only from our predecessors but also from our successors". (owner, Accommodation subsector)

New job proposals

There is a lot of uncertainty about possible new jobs. During the interviews, several interviewees referred to META's Vice President for AI and Chief AI Scientist (Yann LeCunn), who said that AI will lead to jobs and profiles that will disappear in the future, but also to new ones that we are not able to say exactly what they will be yet.

Overall, the following new jobs and profiles were mentioned in the interviews.

Digital skills:

(1)   IT Specialist for Tourism

The IT field is also becoming increasingly important in the tourism industry. The tourism and hospitality sector requires IT specialists who specialise specifically in tourism.

(2) Social Media Expert for Tourism

The use of digital tools is both a huge opportunity and a challenge for tourism marketing. Exploiting these opportunities in social media is essential for businesses. Competitiveness is greatly influenced by whether SMEs have these capabilities.

(3) Human-Machine Teaming Manager

The Human Machine Teaming Manager (HMTM) must be able to combine the leadership experience with some knowledge about all kinds of robotic technologies and systems.

(4) Virtual Tour Guide

With the rise of virtual and augmented reality technology, a virtual tour guide could offer tourists a virtual experience of a destination, without physically being there. This could include 360-degree tours, historical reenactments, and cultural experiences.

(5) GIG Manager in Tourism

GIG workers are independent contractors, online platform workers, temporary workers, contract firm workers, who are also present in increasing numbers in the tourism sector. Consequently, there is a need for professionals who can coordinate the activities performed by GIG workers under different conditions, than normal employment contracts.

Environmental/ green skills:

(1) Food Waste Measurement Specialist

Minimising food waste is a basic condition for the sustainability of catering. We need professionals who have comprehensive knowledge in this field.

(2) Urban Tourism Specialist

The phenomenon of overtourism highlighted the need to reinterpret tourism in the most visited destinations. This requires professionals who - keeping in mind the sustainability of cities (destinations) - are able to organise tourism in

a form and scale that is acceptable to everyone (local residents, tourists, tourism businesses).

(3) Sustainable Gastronomy Expert

Gastronomy is experiencing incredible transformations. In the future, these processes are expected to strengthen further. There will be a need for a specialist who can provide the services required in hospitality in accordance with sustainability requirements.

<u>Social/cultural skills:</u>

(1) Experience Designer in Tourism

As travellers seek out unique and authentic experiences, an experience designer could create customised, personalised travel itineraries that cater to the customer's specific interests and preferences. This could involve arranging private tours, unique dining experiences, and personalised cultural experiences. (For instance, the **Lady in Red**, who is a lady in a red dress, whose duty is essentially to make the guests feel good. There are also hotels with musical director, or appointed cultural ambassador, whose tasks are similar.)

(2) Happiness Manager in Tourism

For more and more employees in the workplace, a monitor is the only connection, which sooner or later leads to boredom and a decrease in creativity and sufficiency. There is a need for a specialist (similar to the animator in the beach resorts) who can shake up co-workers in various joint activities in the office and out of office.

(3) Wellness Travel Consultant

With the growing interest in wellness and self-care, a wellness travel consultant could help customers plan travel experiences that prioritise their physical and mental health. This could include yoga retreats, meditation classes, and wellness-focused tours.

(4) Personalised Guest Experience Coordinator

Travellers looking to book their holidays spend countless hours researching locations, transportation methods, itineraries, and accommodation options. Guests are looking for personalised stays. But they're also used to having all the information they want at their fingertips at all times. This is why you must ensure that you can provide a personalised digital guest experience and only personalise their experience at your property.

4.2 DIGITAL SKILLS

4.2.1 INTRODUCTION

Technological innovations will continue to impact tourism and change business models, jobs in tourism and tourist experiences. This section focuses on digital skills for the future. These are defined as skills related to working with computers, software, digital equipment, internet, online safety. This comprises not only Microsoft Office skills, skills for implementing online safety procedures or skills to adjust digital equipment such as Wi-Fi connectivity, sound systems and video equipment but also desktop publishing skills, computer programming skills, website development skills, social media skills, skills to monitor online reviews, data analytics, business intelligence, big data skills, AI and robotic skills (ChatGPT, Dall-E) and skills related to applying digital hardware technologies such as AR and VR.

This section provides an overview of digital skills that the interview participants rate as the most important in about seven years' time.

Questions that have been discussed with participants were the following:
- Which digital skills are important in your company today?
- Which digital skills are currently lacking in your company?
- How important will these skills be around 2030? Which ones will be most important?
- Which other digital skills can you think of that will be vital for the future?
- Which changes do you anticipate will be necessary within your organisation regarding digital skills (2030)?
- Does your company provide training or education for these skills? If so: what kind of training; if not: why not?
- Do you use an external organisation to help train your staff in digital skills? If so: which ones and what kind of training do they provide?
- What would be the most effective training method in digital skill development for your employees?

4.2.2 RESULTS FROM THE INTERVIEWS

According to interviewees, the technological development of the 21st century is becoming a huge challenge for tourism. *"It should be recognised that in order to make tourism more attractive, more efficient and economically, socially and environmentally sustainable, it is essential to use the solutions offered by the internet, location-based services, artificial intelligence, augmented and virtual reality. It also means rethinking challenging tourism processes such as seasonality, congestion and smart destination developments."*
(director of DMO)

Smart destinations are emerging, where tourism development is characterised by the existence of an innovation, technology and sustainability strategy. It meets the needs of both locals and visitors. Seasonality, multilingualism and cultural diversity become understandable and plannable. *"The smart destination will provide decision-makers with continuous data and analysis, allowing them to optimally target tourism-related developments and increase their efficiency"*.
(representative of a tour-operator company)

These processes are leading to a rethinking of the skills required of the employees of businesses operating in the destination.

The tools and methods of digitalisation are changing so fast that it is almost impossible to foresee and plan 5-10 years ahead. At the same time, it is necessary, as digitalisation also raises new expectations for those working in tourism. These expectations partly require an increase in the level of technical knowledge, and partly assume the existence of new skills and abilities.

"Education and training systems also need to adapt to these new needs, incorporating the necessary changes in their curricula and launching new training courses to enable continuous learning for personnel. This planning and preparation process can be facilitated and helped by the adaptation of good practices already applied and proven in other sectors."
(owner, F&B subsector)

By 2030, virtual reality (VR) and augmented reality (AR) technologies will become increasingly important. Knowledge and application of these will be expected. It is also crucial that employees are willing to learn as much as possible about them and to investigate them independently.

Full automation in the accommodation sub-sector is not feasible. The higher the category of accommodation, the more personal involvement is and will be needed. However, some jobs - such as receptionist - may change, as future guests will use digital tools in their daily lives, and will do so in accommodation. *"In fact, this is already the way Airbnb accommodation works to meet the growing demand"*.
(owner, Accommodation subsector)

New skills are needed

Among the digital skills that will be essential in the future of hospitality, interviewees mentioned programming, algorithm production. *"It will be important that the existing equipment should be customised to a sufficiently high level, e.g., the simple programming of steam ovens and other machines should be known by the workers. Delivery by robots and drones is becoming commonplace. Skills and knowledge levels must increase by orders of magnitude. Currently, the attitude of the staff is a barrier to further digitalisation, e.g., chefs taking inventory or electronic order pick-up in the guest area (fear of the new). In the future, everything will be smartphone-based, with guest relations being the most important aspect of the industry."*
(owner, F&B subsector)

Having an overview, a general picture of the whole activity, will be important for employees in 2030. An open mind, intelligence and ability to adapt to the IT world (dare to touch parts of the programme) will be required. It is clear that developing digital skills will be a business interest for the sector. There is no way of knowing at the moment, but Facebook may be "ageing". On the other hand, the trend of following influencers will certainly continue to grow, and this is something to be prepared for. *"A higher level of digital user skills will be required for everyone. More active use of social media (Facebook, Instagram, etc.) will become important in the future, user-level skills will be essential in all*

areas, and almost all staff will have some digital function (managing compressors, camera systems, card systems, referral systems, etc.)."
(representative, Attraction subsector)

Knowledge of the use of reservation systems should be essential. *"The knowledge is already there, but there is some resistance among workers close to retirement getting to know the evolving systems, even though the new systems could make their jobs much easier. User-level knowledge of Microsoft Word and Excel is essential, but the level of knowledge varies widely between old and new employees."*
(owner, Accommodation subsector)

According to interviewees, the use of social media will be even more important by 2030 than it is today, and this could even be seen as a mandatory expectation. However, it is difficult to decide when, for what purpose and which tool to use. The relevant person should be familiar with all the online spaces where different posts, photos and advertisements can appear.

All interviewees highlighted that the most important digital skill by 2030 will be the knowledge and use of digital marketing, including social media. It is something that is being forced by the market itself.

4.3 ENVIRONMENTAL/GREEN SKILLS

4.3.1 INTRODUCTION

In the secondary data section of this report, it was demonstrated that green skills comprise more than skills for reducing the impact of tourism on the environment (minimise the use and maximise the efficiency of energy and water consumption; manage waste, sewage, recycling, and composting; conservation of biodiversity; knowledge of climate change). They also involve developing and promoting sustainable forms of transport and tourism in (rural) areas as an option to diversify local economies, create economic growth and decent jobs for local people (including women and youth) as well as conserve local natural and cultural heritage. On the other hand, managing and reducing the impact of overtourism is also a part of sustainable tourism.

The results of this section provide an overview of environmental management skills that the interview participants rate as the most important in seven years' time.

Questions that have been discussed with participants were the following:
- What would you consider green / environmental management skills?
- How important will these skills be around 2030? Which ones will be most important?
- Which green/environmental management skills are important in your organisation today?
- Do you expect any changes regarding the necessity of staff with green skills in your organisation between today and 2030? If so, which changes? If not, why not?
- Does your company provide training or education for these skills? If so: what kind of training; if not: why not?
- Do you use an external organisation to help train your staff in green/environmental management skills? If so: which one and what kind of training does it provide?
- What is your opinion on green certification/awards / eco-labels? Are you a member of one of these? Why? What are the benefits for you? If not, why not?

4.3.2 RESULTS FROM THE INTERVIEWS

One of the interviewees from the accommodation subsector mentioned, that:
"Hungarians are not too sensitive to sustainability issues (CSR, green…), but - he thinks- the actors should be made economically interested in order for them to function".

Most of the respondents believe that by 2030, a deeper knowledge of the environment and a positive attitude will also become a basic skill expectation for employees, as it will be expected by the guests.

In the future, the importance of this area will increase considerably (global warming, etc.), with a strong emphasis on issues such as climate change. Waiting until some elements have changed critically is not an option. Sustainable energy and water management solutions should be used as a minimum. *"Support for environmentally friendly products and services will increase, and suppliers will be ranked accordingly. The ability to enforce a higher set of demands on workers by 2030 will depend on managers; only if they are effective, can these skills be set and applied as a minimum expectation."*
(director, DMO)

CSR and "green" certification
Corporate social responsibility and the existence of various "green" certificates are becoming increasingly essential elements of communication in the sector. Currently, it is often only a marketing tool, but hopefully by 2030 it will be an integral part of business life. Meanwhile, the interviewees said that *"the current demand in Hungary is not influenced by these factors, i.e., they do not influence their decision."*
(owner, Accommodation subsector and director, Tour-oerator subsector)

There are, nevertheless, some good initiatives that can serve as a model for other businesses: sourcing from local producers, including seasonal foods in the offer, and "steering" guests towards healthier eating.

This means promoting a "green" approach, which will be expected of employees by 2030. Environmental management is absolutely critical in the company, without its consistent application, employees cannot implement the expected actions. These issues should be addressed at the recruitment stage, but continuous education and training will also be needed.

Environmental awareness will be extremely important in the context of growing tourism: the environmental damage of tourism in ever increasing numbers clearly needs to be mitigated. It is essential that tourism is able to show what a region or country has to offer, but it should also be able to show self-restraint. *"The right attitudes should come from home and from school, and the relevant regulations and standards can be taught - selective waste collection, responsible workplaces, training in environmental conservation. These lessons tend to touch employees, improve attitudes, "take care of our values" is quite obvious."*
(director, Accommodation subsector)

Environmental awareness and education
By 2030, a generation will grow up where environmental awareness will be essential. Young people are starting to understand the importance of environmental protection. Potential changes will take the form of grassroots initiatives.

"Among the skills related to environmental protection, the use of renewable energy sources by service providers and in office work, as well as the demand for eco-friendly transportation methods, is expected to increase within the next 10 years. The adoption of e-buses and e-bikes is seen as a strengthening trend, and at events, reusable equipment will be used. City tour buses will be electrically powered."
(director, Tour-operator subsector)

Future plans include further expanding the home-office system, reducing the proportion of printed publications, and promoting cycling in various destinations. It is expected that the home-office system will expand further (2-5 days per week per person).

Strengthening environmental skills is done through internal training and discussing issues and phenomena. Since the employees are predominantly women, they have a strong affinity for such topics.

The interviewees also mentioned good examples. *"They have foreign partners who prefer sustainably operated hotels and restaurants that work with seasonal and local ingredients. They do not prefer dishes made from ingredients transported from far away during meals. Their clients increasingly try to avoid large portions and the resulting waste, but appreciate it when leftover portions are delivered to those in need. It also leaves a favourable impression when they calculate the carbon footprint of events and try to offset it."*
(owner, F&B)

One interviewee (from the tour-operator/tourist agency subsector) mentioned: *"it is important to participate in several sustainability programs supported by the European Union (Tourban, Travelife), because of the direct experiences"*. According to their experience, exploring sustainable solutions currently requires more time and resources, but it is clearly the way forward. They have a partner who plans to work only with companies that have the appropriate certification starting in 2025.

4.4 SOCIAL-CULTURAL SKILLS

4.4.1 INTRODUCTION

Social/cultural skills can be divided into personal skills, communication/cultural skills, and diversity skills. These skills are related to behavioural and practical attitudinal competencies in teamwork, interpersonal communication, cross-cultural understanding, and customer service orientation. Particularly related to working in the tourism sector are competences towards managing personal relationships, understanding the needs and feelings of others, cooperating with others, showing a positive attitude, showing respect, making appropriate contact and active listening. Furthermore, social/cultural skills deal with competencies that promote social progress which recognizes the needs of everyone; accessible tourism provision for those with disabilities; gender equality. These skills are expected to be of major importance for the tourism sector, to match the needs of a "high tech" society with "the human touch" needed in personal and human interactions in the tourism sector.

This section provides an overview of the social/cultural skills (i.e., personal-, communication/cultural-, and diversity skills) that the interview participants rate as the most important in seven years' time.

Questions that have been discussed with participants were the following:
- What do you consider the most relevant and important social and cultural skills for people working in the tourism sector?
- How important will these skills be around 2030? Which ones will be most important?
- Can you think of more or other social/cultural skills that might be important around 2030?
- What changes do you expect for your organisation with regard to necessary social/cultural skills in the future (2030) compared to today?
- Does your company provide training or education for these social/cultural skills? If so: which ones; if not: why not?
- Do you use an external organisation to help train your staff in social/cultural skills? If so, which ones and what kind of training do they provide?

- What would be the most effective training method in social/cultural skill development for employees?

4.4.2 RESULTS FROM THE INTERVIEWS

According to the interviewees, among social skills, guest orientation and commitment clearly rank at the top. These skills are expected to remain prominent even by 2030. By 2030, empathy will be the top priority and, of course, communication with guests will remain high on the list. Acceptance of 'otherness' is essential, as it has not been a major issue in the sector in the past. Verbal and written communication will become even more critical by 2030. The quality of employee and management responses on social media and websites, along with embedded photos, will be of paramount importance. Companies should also be prepared for guests with potentially low tolerance levels, as the presence of disadvantaged individuals as guests can pose challenges. These challenges need to be effectively managed, if not prevented.

One interviewee from the tour-operator/tourist agency subsector mentioned: *"it is a challenge to shake up colleagues of different ages. In addition to its advantages, the partial retention of the home office is also a difficulty: it is difficult to maintain team cohesion. These problems are helped by regular team building, where the emphasis is on gaining common experience."*

Team-building

Team spirit, communication, problem-solving skills, resilience – these are the skills that are important now and in the future. Harmonising teamwork and organising training sessions are essential, as different generations will need to work together, each with varying skills.

Among the interviewees were those who organise training on the above topics: e.g., team building, assertive training, intra-team communication, conflict management are the most important topics. An excellent example is the interviewee who - belonging to an international hotel chain - told us that to to date 2000 people have been trained for 3x2 days within the "Sixth Sense"

training could be even more effective, and perhaps in the future small group interactive training sessions facilitated by a trainer, where 80% of the time employees learn new skills through practical exercises and coaching. Here again, gamification is important and VR is likely to be more widely used. Addressing issues related to gender equality, disabilities, and cultural and religious differences will become increasingly important in the future.

Some hotels currently offer diversity training using internal resources, while team-building training is organised by external experts. Modelling situations could be the most effective method for developing social skills.

Even smaller businesses conduct internal individual training, often led by the owner, based on case studies or how to handle different types of guests.

As a general expectation, the interviewees would like to see these issues addressed more in school education in the future. Maintaining relationships with other countries can also help as there is much to learn from their examples.

Empathy and tolerance

Empathy remains the most important, alongside acceptance, tolerance, and patience. Hopefully, these qualities will remain important in 2030 (and not be replaced by robots) because personalization is the highest level of service. There are no other relevant questions regarding social skills, as this profession fosters a much more tolerant environment compared to others. Managing differences that arise from having such a diverse guest base has long been part of the industry, so those who cannot handle it are usually excluded.

Among the interviewees of the F&B subsector, there is one whose company always chooses the youngest candidate when recruiting, with a strong desire to learn and wanting more. There is also a company where monthly training on conflict management and tolerant behaviour is organised for waiters. These trainings are given by a trained coach, the situations analysed are real situations, so they cannot imagine a more effective way.

In addition to curiosity and tolerance, which are still important today, literacy is seen as of the utmost importance in the future. One interviewee from the DMO subsector mentioned: *"any form of discrimination, be it racial or otherwise, is unacceptable."* The most crucial aspect of guest care, in the guest-company relationship, is the ability to deal with customers from diverse cultural and religious backgrounds, with disabilities (disabled, visually impaired, deaf, etc.). Several businesses organise charity actions for disadvantaged individuals, including meals, accommodations, training, and event planning. Participation in these activities is collective and strengthens team spirit, fostering a unified corporate culture. It is important that the staff are fair people. They screen for this when they recruit (lack of fairness is a risk in the profession). For 2030, the most powerful skill will remain a sense of fairness, as the customer entrusts them.

Interviewees had varying opinions on the importance of language skills; some still considered them important, while others believed that the Google Translate program would reduce the significance of this skill by 2030.

Conflict resolution

Among the social skills, the essential need for openness will be reinforced in the sector. In each destination, minimising and managing conflicts between local people and tourists will be inevitable. A particular challenge is the issue of overtourism. The willingness to accept differences is also considered very important.

By 2030, friendliness, a positive attitude and openness will remain a basic requirement. In their opinion, more emphasis will be put on being able to think on your feet, to "brainstorm" and to make suggestions. It is not only the communication with tourists that is important, but also the internal atmosphere in the organisation: how adaptable and flexible it is, aspects that are looked at when newcomers come in.

Conclusion of the interviews

According to interviewees, among the digital skills that will be essential in the future of hospitality, interviewees mentioned programming, algorithm production, and for small problems, creating their own content. An open mind, intelligence and ability to adapt to the IT world (dare to touch parts of the programme) will be required. It is clear that developing digital skills will be a business interest for the sector.

By 2030, a generation will grow up where environmental awareness will be essential. Young people are starting to understand the importance of environmental protection. Potential changes will take the form of grassroots initiatives.

According to the interviewees, among social skills, guest orientation, commitment, team-spirit, problem-solving, empathy, acceptance, tolerance are among the most important skills in the future. All the interviewees stressed the need for lifelong learning, i.e., they expect their employees to constantly expand their knowledge and develop their skills in line with tourism trends.

5. BEST PRACTICES

UPSKILLING AND RESKILLING

In each country that is represented in the Pantour consortium, partners have each selected, analysed and interviewed **5 best practices** in upskilling, reskilling, attracting/retaining staff in the five tourism sub sectors. The goal of the analysis is to have an inventory of innovative initiatives, projects, programs, philosophies, tools, methods, ideas, solutions, and concepts in relation to upskilling, reskilling, attracting, and retaining staff in order to improve the knowledge on digital, social, and green skills development in tourism.

1 It has a clear goal.

2 It purposely addresses the bridging of existing skills gaps and future skills needs in tourism.

3 The organisation and individual staff members have a set of core values that strengthen their dedication, morale, and resolve a shared sense of purpose for the work.

4 It looks at urgent skills development challenges and human capital in their context – on macro level (sustainable/digital transition in tourism), sector/subsector level or skills level (digital, social, green skills).

5 It targets the underlying causes in addition to the challenge in upskilling and reskilling, attracting/retaining.

In the following sections, a short overview and analysis will be provided of each of the Best Practices investigated in the frame of the PANTOUR project.

The KLIKK competence development programme is designed as an internal development.

5.1 BEST PRACTICE: DANUBIUS HOTELS

5.1.1 Background information

Danubius Hotels, based in Hungary, is one of Europe's leading hotel companies. The hotel group's hotels, which are typically high-quality city, spa and resort hotels, are located in Hungary and the UK. Danubius Hotels' 15 hotels in Hungary are located in some of the country's most popular tourist destinations, including Budapest, Lake Balaton, Bükk and Gyor. The company's portfolio is completed by the Danubius Hotel Regents Park in London.

Danubius Hotels has more than 2200 employees, whose commitment, professionalism and dedication are rewarded with professional and human support. It is thanks to this harmonious relationship and team spirit that, even with new recruits, their colleagues have been working at Danubius Hotels for an average of more than 10 years.

Danubius Hotels prides itself on being innovative not only in its business services, but also in its approach to employers. Guests and employees are equally important to the company, which received the 2019 Employer of the Year Award from the National Association of Tourism and Hospitality Employers.

In the summer of 2021, Danubius Plc. participated in the certification process of becoming a Responsible Employer, coordinated by OFA (National Employment Nonprofit Ltd.). The application examined the organisational functioning and internal processes of Danubius Plc. from several dimensions. The material submitted for certification led to the achievement of the Responsible Employer Silver certification level. The certification is a confirmation that people are one of the most important assets in the life of the organisation and that the company is working every day to stabilise its operations through internal processes and to retain its workforce to the best of its ability. This is also the primary goal for the coming period to strengthen Danubius Plc. as an employer brand (Danubius Hotels, n.d.).

5.1.2 Analysis and overview

Key principles

Digitising HR is a huge challenge for the hotel industry. Not only HR staff, but all employees as users are involved, and it is essential for all of them to acquire the necessary competences. The **Ticketing system** used in Danubius HR activities allows communication between HR and the employee to take place online. This allows the transmission of payroll paperwork, employee requests (e.g., for health insurance, pension fund) to be handled online without the need for a personal presence. This also ensures the concentration and rationalisation of HR activities in the hotel company.

Examples and case studies

In order to help employees manage their HR affairs smoothly, Danubius has developed a digital competence development package, which is available free of charge. In this package, the tools and interfaces that are essential to know and use today, both at work and in private life, have been developed in blocks.

The digital skills development programme is called **KLIKK**. The KLIKK includes the following sub-programmes:
- internet and usage

- social-media and its use
- smart devices and their use
- use of video call, Zoom, Teams, etc
- use of email (etiquette)
- use of the client portal (submitting applications for documents, booking appointments at public institutions, health facilities, tracking medical examinations, etc.)
- banking (dealing with the bank, using the internet banking platform)
- using of KRÉTA (the digital system used in Hungarian public education, which also has a parent interface)

Potential pitfalls and challenges

The trainings are voluntary and free of charge. Consequently, the interest of the workers must be created. This can be greatly helped by the fact that the training courses include many that make everyday life (private life, family life) easier, thus the employees obviously prefer to participate in trainings that are important from a professional point of view. A new challenge is the development of English-language versions of relevant training courses for foreign workers.

Because Danubius left a relatively long transition period until 2030 to create complete digitization, the full preparation of workers can be solved.

Benefits and outcomes

The KLIKK's sub-programmes are free of charge and available to employees on a voluntary basis, who can select the programme(s) they need and access them online.

The KLIKK competence development programme is designed as an internal development, with each topic presented by an external expert and professional speaker.

Danubius' goal is that by 2030, employees will be able to make full use of the various digital platforms, i.e., digital organisation of work will be achieved.

Measuring success

In the case of complete HR digitization, paper-based, personal administration (contract, payroll, patient file, insurance, assignment of tasks, etc.) will be eliminated.

Responsibility and accountability

Within the HR directorate, the director of education is responsible for the trainings.

References and external resources

https://www.danubiushotels.com/
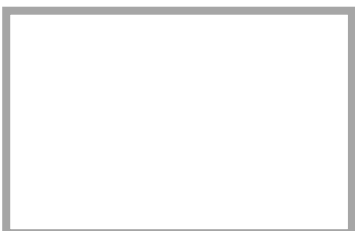
Conclusion

Danubius is a large Hungarian company with a central HR directorate. The digital skills development training package they developed and implemented is a good example of how to encourage employees to participate, and at what pace it is advisable to plan the skills development training necessary for the transition to full digitalization.

Participation in dual training programs makes it easier for the company to recruit future employees.

5.2 BEST PRACTICE: EVENTREND

5.2.1 Background information

The main activities of the EVENTREND group of companies are catering, event management, and hotel management. The group has grown steadily, bringing together more than 30 catering companies, venues, and event management companies, employing more than 800 people permanently, providing work placements for around 100-150 students as a dual partner for secondary schools, and is involved in organising around 4,000 events and serving millions of guests each year (Eventrend Group, n.d.).

5.2.2 Analysis and overview

Key principles

Based on decades of experience, the EVENTREND group has developed its training packages, which offers as internal training for its staff. These courses provide the necessary skills development required by EVENTREND at different levels and using different methods.

Examples and case studies

(1)   Training for senior managers

The training courses are called "Talent Academy", which initially provided training for staff in management positions.

The training was primarily aimed at developing management skills. Attendance at this training was compulsory twice a week for a year. On completion, a minimum score of 90% in the examination was required to obtain a manager licence.

The training itself was delivered by a recognized external training provider with extensive experience in people management (DEVELOR).

The main topics of the training were:

- leadership development
- attitude shaping
- commitment development

Overall, the main goal of the EVENTREND group is to achieve a common language to increase efficiency in the future. Personal participation in the training helped to dissolve the rivalry between the companies, to develop the right, forward-looking, and expected communication, and to improve the company culture.

(2)   Training for middle managers

Based on the success of the training for senior managers, EVENTREND plans to offer similar skills development training for middle managers in the future. This will be implemented with the involvement of the TALENT Sector Training Centre. The training will be delivered partly in an in-person and partly online format: five topics will be led by a trainer, the rest at their own pace online. Training topics:

- marketing, digital marketing skills development
- sustainability skills development

(3)   Succession training

EVENTREND is involved in the dual training program of various vocational schools and universities, providing practical training for 100-150 students. In the framework of the so-called "Apprenticeship Programme", in addition to dual training, great emphasis is placed on making the profession attractive, finding and recruiting future young employees. To this end, they regularly "go out" to vocational schools, where they occasionally give presentations to parents with the participation of celebrity chefs. The use of artificial intelligence, often proposed as a future solution to labour market problems, is seen as a realistic option in the field of communication. In their view, robots will be able to replace the workforce mainly in catering, while premium catering will continue to focus on personalised experiences.

Potential pitfalls and challenges

As for all hospitality businesses operating in Hungary, the biggest challenge for Eventrend is the recruitment and retention of the workforce. With the dual trainings, they can attract the youngest age group, 15-18 years old, and with the internal trainings, they can provide those adult employees with the necessary skills and knowledge in a short time, who did not have them before. Furthermore, internal trainings help to retain the workforce, as they ensure career planning.

Benefits and outcomes

Most of the internal training courses are available online and they no longer only support future Eventrend-managers with training in achieving their goals, but also provide a wide range of their colleagues with the opportunity to develop in a specific competences and skills and advance in their careers.

Participation in dual training programs makes it easier for them to recruit future employees.

Measuring success

The effectiveness of the training is evidenced by the large number of employees who have been working for the company group for many years, as well as the progress in the positions they hold.
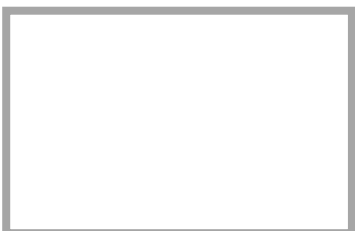
Responsibility and accountability

The company group's training director is responsible for all training in the Talent Academy, as well as for dual training and the recruitment of young new employees.

References and external resources
https://eventrend.hu/
https://www.facebook.com/tehetsegakademia/

Conclusion

Overall, the main goal of the EVENTREND group is to achieve a common language to increase efficiency in the future. Personal participation in the training helped to dissolve the rivalry between the companies, to develop the right, forward-looking, and expected communication, and to improve the company culture.

Participation in international projects means that employees keep up with the latest trends and acquire the skills necessary to carry out new activities.

5.3 BEST PRACTICE: JET TRAVEL

5.3.1 Background information

Jet Travel is a specialist travel consultant, travel agency, and tour operator, assisting companies in developing their annual travel concept, planning, organising, and implementing individual trips, and evaluating the trips implemented. As an independent travel broker, it acts solely in the interests of its clients, seeking out and recommending the best opportunities in the travel market.

The company was founded in 1989 and has focused on business travel since 2006. In the years since then, it has gained considerable professional experience in the organisation of official inbound and outbound trips, events, and incentive package tours. Since 2017, it has been supporting its partners in separate business lines to achieve even higher quality. Its philosophy is to offer high quality, value for money, personalised, accurate, and fast service from the moment the idea of the trip is conceived to the creation of the photo album (Jet Travel, n.d.).

5.3.2 Analysis and overview

Key principles

The key to its professional success is its highly qualified staff, who have decades of experience in the tourism industry and have become professional travel specialists.

JET TRAVEL pays continuous attention to the training and professional development of its staff. But, as a small company, it is unable to provide training

for its employees on its own, so it constantly participates in domestic and international tenders. The tenders make it possible to improve the skills of the staff through the exchange of experience in connection with the content of the tender and/or to finance internal trainings, if the call for tenders allows for this. The best practice is an example of how tenders can give opportunity for regular trainings.

Examples and case studies
Before COVID, JET TRAVEL employed 40 people. During the epidemic, 60% of the workforce was retained, and after the epidemic, some of them were recruited back. However, some of the staff left the tourism sector and found better opportunities elsewhere, in different circumstances and under different conditions.

In 2023, 60 people worked for the company, 15 of whom have been recruited specifically for the organisation of the World Athletics Championships in Budapest (JET TRAVEL played a key role in the organisation of the World Athletics Championships).

JET TRAVEL's human resources management will continue to follow this structure: there will be permanent staff and there will be staff employed for a specific period of time, for a specific project.
This structure requires the following for an SME:
- Strong micro-management
- One employee must be able to perform several tasks
- Continuous skills development

In JET TRAVEL, the development of digital, green, and social skills is equally important to adapt to international trends in tourism. The training is conducted as internal training with the involvement of external trainers. Each training is compulsory for all employees, but optional (attendance or online).

Another way to develop skills is to participate in international projects, where a lot can be learned directly from other countries' experiences. In recent years,

they have participated in the TOURBAN international project, where they have focused on sustainability skills and have also been involved in testing NTG curricula.

Potential pitfalls and challenges

JET TRAVEL says that it is a challenge to bring together staff of different ages. Another difficulty is the partial retention of the home office, which has its advantages: it is difficult to maintain team cohesion. These problems are helped by regular team building, where the emphasis is on gaining common experience (in recent years, for example, joint painting sessions, joint social responsibility performances, and charity work).

Benefits and outcomes

For JET TRAVEL, participation in international projects means that its employees keep up with the latest trends and acquire the skills necessary to carry out new and new activities.

Measuring success
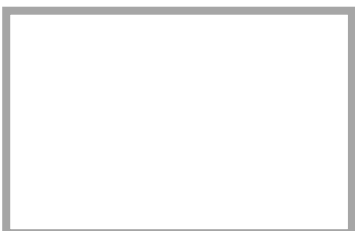
A clear measure of success is that JET has become a key player in business travel and event organisation.

Responsibility and accountability

Jet Travel is a small company, so the managing director is responsible for trainings, as well.

References and external resources
https://www.jettravel.hu/

Conclusion

JET TRAVEL, as a small company, tries to ensure continuous skills development by participating in international projects and domestic tenders. Without them, JET wouldn't be able to train its employees.

Essential skills can be developed even in the absence of a funding source.

5.4 BEST PRACTICE: ALFÖLD SLOW ASSOCIATION

5.4.1 Background information

Alföld Slow Association was founded in 2018 by 10 settlements of Békés County (South-Eastern Hungary) in order to preserve and show their values and traditions to future generations.

Their fundamental aim is to run liveable and sustainable communities for the long term. The destination is an economically less developed region of Hungary, far from the main tourism flows, but one of the founding settlements, Gyula, has a high profile in terms of health tourism (Alföld Slow, n.d.).

5.4.2 Analysis and overview

Key principles

This best practice is an example of how essential skills can be developed even in the absence of a funding source.

The Association considers the spreading of slow tourism and the slow approach to be its most important task in the destination. It would like to raise interest in the topic among the local communities in order to implement and emphasise the individual tasks.

Their strategy is to embrace the present moment in this fast-paced world, to become more conscious, both in lifestyle and in consumption, which is the basis of health. This requires supporting and strengthening local and national productive enterprises and involving tourism businesses (Alföld slow Stratégia, 2023).

Examples and case studies

Education and awareness-raising are a priority in the Association's strategy. This is all more important considering the Association has a very small number of professionals with appropriate tourism qualifications, including sustainability and digital skills. One of the founders was a university and later another university joined, so their help is essential from an education and training perspective. However, the relationship with universities is based on reciprocity. University students may occasionally contribute to the Association's projects in the field of tourism development.

The following targets have been set for skills development up to 2030:
- Developing digital skills, with the aim of creating digital solutions for tourism marketing in all member municipalities, reducing the skills gap and the shortage of professionals.
- Sustainability skills development (in line with EU guidelines), aiming at raising awareness of slow tourism, preparing and presenting professional materials.
- Launching training courses at municipal level
  - **Rural tourism training:** In cooperation with the National Association of Rural Tourism (FATOSZ), Békés county branch.
  - **Lowland Slow training:** It would be worthwhile to organise and run the following training courses: application of Slow elements in existing attractions, accommodation and catering facilities; Certification system; Basic tourism knowledge; Marketing communication basics.
  - **Collaboration with member universities:** The implementation of objectives jointly set by member universities, involving students and academics.

Potential pitfalls and challenges

Funding problems are a barrier to training development. Consequently, it would be futile to participate in various tenders, to have good ideas and enthusiastic applicants, if there are very few resources available in the municipalities, if there is a lack of own resources. The Association is trying to find solutions to the problems.

- they have launched a series of conferences, the Lowland Slow conferences, e.g:
  - the targeted area is the Southern Great Plain
  - the next time the target area will be the whole of the Great Plain
  - later partners from beyond the borders
- Organise and participate in workshops
- Study tours are organised and participated in

Benefits and outcomes

The study trips serve not only to increase professional knowledge, but also to achieve the planned skills development, as they ensure their achievement through personal experiences. During the latest study trip, members of the Slow Alföld Association visited the most developed economic-tourist region in Hungary after Budapest, the Alpokalja-Fertőtáj destination in Western Transdanubia, along the Austrian border. Here they got to know and experience good practices of tourism development, met representatives of the destination management organisation and relevant entrepreneurs. They took part in the event of the Tourism Club, founded at the University of Sopron, where they introduced themselves.

Measuring success

Since then, they have already hosted colleagues from Western Transdanubia in the Southern Great Plain, reciprocating the successful meeting and promoting mutual knowledge between the different regions, which is currently very poor. In the future, they plan to contact other destinations in a similar way, through face-to-face meetings and study tours, as currently limited financial resources only allow them to support travel costs.

Responsibility and accountability

A board member of the association is responsible for organising the listed events and trainings.

References and external resources

https://alfoldslow.hu/alfold-slow-strategia/
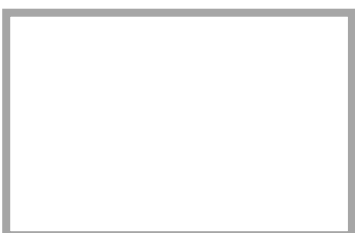
Conclusion

The BP of ALFÖLD SLOW Association is a good example of how essential skills can be developed even in the absence of a funding source.

Conferences and study tours organised on a reciprocal basis serve not only to expand professional knowledge, but also to implement planned skill development.

The main goal is to contribute to the dissemination of environmental sustainability aspects and skills in as many forums as possible.

5.5 BEST PRACTICE: Balaton-felvidéki Nemzeti Park (Balaton-Upland National Park)

5.5.1 Background information

BNP is one of the best known of the 10 national parks in Hungary, as it is located in the Balaton region, which is Hungary's second most important tourist destination.

The area of the national park, established in 1997 (57,019 hectares), consists of six former landscape protection districts. With its creation, the old dream of Hungarian nature conservation came true: by connecting long-separated protected areas, a protected ecological system covering the contiguous area of the Balaton highlands was created. BNP has 135 employees, including some professionals with tourism qualifications (Balaton-felvidéki Nemzeti Park, n.d.)[5].

5.5.2 Analysis and overview

Key principles

In addition to nature conservation, the basic activities of the Directorate include tourism and the presentation of natural values, as well as awareness raising and environmental education. Therefore, they consider it important to create demonstration places where the natural treasures and specialties of the given area can be presented.

[5]Balaton-Upland National Park (Balaton-felvidéki Nemzeti Park)

Examples and case studies

The website of the Balaton Highlands National Park Directorate, in addition to presenting the area of the national park, tries to provide information about the exhibition sites, accommodation, hiking opportunities and nature trails belonging to the directorate.

Visitor centres and exhibition spaces primarily meet the needs of tourism. Forest schools serve nature conservation education, and their programs are integrated into primary and secondary education programs. Guided tours, educational trails, and various events help tourists and the region's residents spend their free time.

They are planning to launch new courses, among others:

- trainings of tour guides capable of guiding hearing and visually impaired visitors (social skills)
- training of geotour guides (sustainable/green skills)
- regular IT training for employees

The short training programs developed by Pantour can be useful for them.

Potential pitfalls and challenges

The BNP hopes to introduce new job profiles at the organisation by 2030. Based on the Austrian example, the Organization would like to establish environmental education and tour guiding for the hearing and visually impaired. They also strive to ensure that the special lessons of school students can take place in an external environment (e.g. biology, geography, environmental class, etc.).

Benefits and outcomes

They have established a close cooperation with the University of Pannonia, often holding lectures for tourism majors about the organisation and professional practical knowledge. The access gate as IT development and a partner company are currently carrying out the continuous development of the website. An app has also been developed. From a marketing point of view, they have improved the appearance and presence of social media.

Measuring success

For the National Park, success means that they can contribute to the dissemination of environmental sustainability aspects and skills in as many forums as possible: regular lectures and presentations for university students and schoolchildren, number of tour guides trained by them.

Responsibility and accountability

The head of the Ecotourism and Environmental Education Department is responsible for the training.

References and external resources

https://www.bfnp.hu

Conclusion

The National Park operates as a state budget institution. Environmental education is one of its core activities. The methods used in environmental skills development for different segments are a good example for similar tourist attractions.

SKILLS SYNTHESIS

a skilled workforce is essential for the sustainable growth competitiveness of the tourism sector

The findings presented in this report serve as a roadmap for policymakers, educators, and industry stakeholders to collaborate effectively in shaping the future of tourism workforce development.

In essence, the PANTOUR Country Skills Profile Reports serve as a call to action, urging stakeholders to prioritize skill enhancement initiatives and embrace innovative practices to ensure the continued success and resilience of the tourism industry in the years to come.

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f   facebook.com/nexttourismgeneration

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y   twitter.com/NTGAlliance

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in   linkedin.com/company/pantour-pact-for-next-tourism -generation-skills/

The research design for this report was approved by the Ethics Board of Breda University of Applied Sciences (NL) with reference number BUas-RERB-23-03-Pantour-

PANTOUR
PACT FOR NEXT TOURISM GENERATION SKILLS

https://nexttourismgeneration.eu/pantour/

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Appendix 1. Examples of Digital training providers

Training provider name: 1. BME University 2. ELTE University 3. MATE University 4. SZEGED University 5. Debrecen University 6. Pécs University 7. Pannon Univesity
Website: 1. https://www.bme.hu/ 2. https://www.inf.elte.hu 3. https://karolyrobertcampus.uni-mate.hu/i 4.   https://www.inf.u-szeged.hu 5. https://www.inf.unideb.hu/ 6. https://pte.hu/ 7.   https://mik.uni-pannon.hu/
Type of provider (see list above): University
Covered skills types (see list in *General Introduction*): Computer Science BSc and MSc • digital business analysis and data-driven decision making (increased offer of personalised tourism services and take-up of data-driven destination management tools); • data entry capabilities • data science • artificial intelligence; • robotics; • user experience design. • web & app development • programming; • digital content creation (online and for product innovation, e.g. with VR/AR) • digital design and data visualization • digital product management
Methods of delivery (i.e., online/class; modules/courses/trainings, certification): classes courses diploma

Training provider name:
1. Budapest Business School
2. Corvinus University
3. Metropolitan University
4. MATE University
5. Sopron University
6. ELTE University
7. Széchenyi István University
8. Miskolc University
9. Edutus University
10. Pécs University
11. Pannon University
12. Eszterházy Károly University
13. Szeged University
14. Kodolányi János University
15. Debrecen University

Website:
1. https://uni-bge.hu/hu/kepzesek
2. https://www.uni-corvinus.hu/
3. https://www.metropolitan.hu/search/?expression=turizmus-vend%C3%A9gl%C3%A1t%C3%A1s
4. https://uni-mate.hu
5. https://lkk.uni-sopron.hu
6. https://sek.elte.hu/kepzesek/alapkepzesek
7. https://idforg.sze.hu/
8. https://gtk.uni-miskolc.hu/
(9) https://www.edutus.hu/oktatas/alapkepzes/turizmus-vendeglatas/
(10) https://ktk.pte.hu/hu/kepzesek/alapkepzesek/turizmus-vendeglatas
(11) https://www.gtk.uni-pannon.hu/turizmus-vendeglatas-alapszak/
(12) https://uni-eszterhazy.hu/gti/turizmus-vendeglatas-alapkepzesi-szak
(13) https://eco.u-szeged.hu/
(14) https://www.kodolanyi.hu/felveteli/tanulmanyok/alapkepzes/turizmus_vendeglatas
(15) https://econ.unideb.hu/

Type of provider (see list above):
Universities

Covered skills types (see list in *General Introduction*):
Tourism and Hospitality BSc and Tourism Management MA
• general computer literacy
• basic office application use (text processing, spreadsheet use, presentation software)
• e-mail and chat
• data entry capabilities

• social media use digital business analysis and data-driven decision making (increased offer of personalised tourism services and take-up of data-driven destination management tools);
Methods of delivery (i.e., online/class; modules/courses/trainings, certification): classes courses diploma

Training provider name: Hungarian Marketing Association together with Digital Masters Institute (Dublin)
Website: https://digitalmasters.hu/
Type of provider (see list above): Trade Association
Covered skills types (see list in *General Introduction* of this document): • e-mail and chat • data entry capabilities • social media use • web-based communications • digital marketing & communication;
Methods of delivery (i.e., online/class; modules/courses/trainings, certification): online courses in English

Training provider name: Confederation of Hungarian Employers and Industrialists (BUSINESS HUNGARY) + VIMOSZ   Addressing labour market challenges in the accommodation and food service sector project
Website: http://www.turizmuspalya.hu/   http://vimosz.org/hazai-projektek/munkaeropiaci-kihivasok-kezelese-a-szallashely-szolgaltatas-vendeglatas-agazatban/
Type of provider (see list above): Trade Associations
Covered skills types (see list in *General Introduction*): Using digital and green skills development training materials, we trained 13 people to reduce the skills gap.

Methods of delivery of this provider (i.e., online/class; modules/courses/trainings, certification): online trainings

Training provider name: Jet Travel Ltd.
Website: https://www.jettravel.hu/
Type of provider (see list above): Business
Covered skills types (see list in *General Introduction*): • e-mail and chat • data entry capabilities • social media use • web-based communications • digital marketing & communication • applying privacy and ethics at digital environment
Methods of delivery of this provider (i.e., online/class; modules/courses/trainings, certification): online trainings

Training provider name: SZÁMALK TRAINING CENTER
Website: https://szamalk.hu/
Type of provider (see list above): Private
Covered skills types (see list in *General Introduction*): • general computer literacy • basic office application use (text processing, spreadsheet use, presentation software) • e-mail and chat • data entry capabilities • social media use • digital business analysis and data-driven decision making (increased offer of personalised tourism services and take-up of data-driven destination management tools); • data entry capabilities • data science; • web & app development • programming; • digital content creation (online and for product innovation, e.g. with VR/AR) • digital design and data visualisation • digital product management

Methods of delivery of this provider (i.e., online/class; modules/courses/trainings, certification): online/classes, modules/courses, certificate

Training provider name: CODECOOL
Website: https://codecool.com/
Type of provider (see list above): Private
Covered skills types (see list in *General Introduction*):   • programming   • artificial intelligence;   • robotics;   • user experience design.
Methods of delivery (i.e., online/class; modules/courses/trainings, certification): online/classes courses certification

Training provider name: RUANDER TRAINING CENTER
Website: https://www.ruander.hu/webdesigner-tanfolyam.html
Type of provider (see list above): Private
Covered skills types (see list in *General Introduction*):   • web & app development   • programming;   • digital content creation (online and for product innovation, e.g. with VR/AR)   • digital design and data visualisation   • digital product management
Methods of delivery (i.e., online/class; modules/courses/trainings, certification): online, modules

Training provider name: FORTYX ACADEMY
Website: https://www.fortix.hu/
Type of provider (see list above): Private
Covered skills types (see list in *General Introduction*):   • secure information processing

• digital product management
Methods of delivery (i.e., online/class; modules/courses/trainings, certification): online and/or classes modules and trainings certifications

Training provider name: Learning Innovation Ltd
Website: https://www.learninginnovation.hu/
Type of provider (see list above): Private
Covered skills types (see list in *General Introduction*): • general computer literacy • basic office application use (text processing, spreadsheet use, presentation software) • e-mail and chat • data entry capabilities • social media use • digital business analysis and data-driven decision making • data entry capabilities • data science; • secure information processing • digital product management • applying privacy and ethics at digital environment
Methods of delivery (i.e., online/class; modules/courses/trainings, certification): online or classes certification

Appendix 2. Examples of 'Green' training providers

Training provider name:
1. Sopron University
2. MATE University
3. Pannon University
4. Debrecen University
Website:
1. http://emk.uni-sopron.hu/
2. https://uni-mate.hu
3. https://uni-pannon.hu
4. https://mek.unideb.hu/
Type of provider (see list above):
Universities
Covered skills types (see list in *General Introduction*):
Nature Conservation Engineering BSc
• reduce the use of raw materials, energy, and water consumption, increase the use of renewable energy
• adopt various preventative measures and recycling practices to minimise waste, in particular plastic and food waste
• apply the principles of sharing economy
• utilise sustainable procurement practices
• understand the concept of carrying capacity and how to sustain it
• understand governmental planning systems ensuring carrying capacity and collaborate with local government
• minimise pollution
• identify the sources of greenhouse gas emissions in tourism companies and implement procedures to reduce them
• calculate the Carbon Footprint generated by company's actions and make plans how to reduce and compensate it
Methods of delivery (i.e., online/class; modules/courses/trainings, certification):
classes
courses
diploma

Training provider name:
1. BME University
2. Óbuda University
3. Pécs University
4. Szeged University

5. Debrecen University 6. Pannon University
Website: 1. https://www.ch.bme.hu/ 2. https://rkk.uni-obuda.hu/ 3. https://mik.pte.hu/ 4. https://geosci.u-szeged.hu/ 5. https://eng.unideb.hu/ 6. https://mk.uni-pannon.hu/
Type of provider (see list above): Universities
Covered skills types (see list in *General Introduction*): Environmental Engineering BSc and MSc • set environmental objectives • understand governmental planning systems ensuring carrying capacity and collaborate with local government • integrate the specifics of environmental legislation into company's actions • adopt an environmental management system to plan, act, and monitor • apply and manage sustainability certification schemes • use digital technologies to integrate smartness and sustainability • redesign supply chains
Methods of delivery (i.e., online/class; modules/courses/trainings, certification): classes courses diploma

Training provider name: 1. Szeged University 2. MATE University
Website: 1. https://eco.u-szeged.hu/ 2. https://uni-mate.hu
Type of provider (see list above): Universities
Covered skills types (see list in *General Introduction*): Food Engineering BSc • adopt various preventative measures and recycling practices to minimise waste, in particular plastic and food waste • utilise sustainable procurement practices • set environmental objectives • integrate the specifics of environmental legislation into company's actions • adopt an environmental management system to plan, act, and monitor • apply and manage sustainability certification schemes • use digital technologies to integrate smartness and sustainability

• redesign supply chains
Methods of delivery (i.e., online/class; modules/courses/trainings, certification): classes courses diploma

Training provider name: 1. Budapest Business School 2. Corvinus University 3. Metropolitan University 4. MATE University 5. Sopron University 6. ELTE University 7. Széchenyi István University 8. Miskolc University 9. Edutus University 10. Pécs University 11. Pannon University 12. Eszterházy Károly University 13. Szeged University 14. Kodolányi János University 15. Debrecen University
Website: 1. https://uni-bge.hu/hu/kepzesek 2. https://www.uni-corvinus.hu/ 3. https://www.metropolitan.hu/search/?expression=turizmus-vend%C3%A9gl%C3%A1t%C3%A1s 4. https://uni-mate.hu 5. https://lkk.uni-sopron.hu 6. https://sek.elte.hu/kepzesek/alapkepzesek 7. https://idforg.sze.hu/ 8. https://gtk.uni-miskolc.hu/ 9. https://www.edutus.hu/oktatas/alapkepzes/turizmus-vendeglatas/ 10. https://ktk.pte.hu/hu/kepzesek/alapkepzesek/turizmus-vendeglatas 11. https://www.gtk.uni-pannon.hu/turizmus-vendeglatas-alapszak/ 12. https://uni-eszterhazy.hu/gti/turizmus-vendeglatas-alapkepzesi-szak 13. https://eco.u-szeged.hu/ 14. https://www.kodolanyi.hu/felveteli/tanulmanyok/alapkepzes/turizmus_vendeglatas 15. https://econ.unideb.hu/
Type of provider (see list above): Universities
Covered skills types (see list in General Introduction): Tourism and Hospitality BSc and Tourism Management MA

- use natural resources sustainably in tourism products: products related to nature conservation, responsible animal interactions, use of nature protected areas
- promote the sustainability of transport from tourists' and supply chains' perspective
- set environmental objectives
- adopt an environmental management system to plan, act, and monitor
- apply and manage sustainability certification schemes
- increase cooperation with the local stakeholders

Methods of delivery (i.e., online/class; modules/courses/trainings, certification):
 classes
courses
diploma

Training provider name:
Budapest Business School

Website:
https://uni-bge.hu/hu/pszk/kepzesek/kornyezeti-fenntarthatosagi-ismeretek-b2020000356-kompetenciafejleszto-kepzes--471

Type of provider (see list above):
university

Covered skills types (see list in *General Introduction*):
- set environmental objectives
- integrate the specifics of environmental legislation into company's actions
- adopt an environmental management system to plan, act, and monitor
- apply and manage sustainability certification schemes
- use digital technologies to integrate smartness and sustainability
- redesign supply chains
- increase cooperation with the local stakeholders

Methods of delivery (i.e., online/class; modules/courses/trainings, certification):
 online, certification

Training provider name:
Jet Travel Ltd.

Website:
 https://www.jettravel.hu/

Type of provider (see list above):
Business

Covered skills types (see list in *General Introduction*):
- identify the sources of greenhouse gas emissions in tourism companies and implement procedures to reduce them
- promote the sustainability of transport from tourists' and supply chains' perspective

• use natural resources sustainably in tourism products: products related to nature conservation, responsible animal interactions, use of nature protected areas • minimise pollution • apply and manage sustainability certification schemes • use digital technologies to integrate smartness and sustainability • redesign supply chains • increase cooperation with the local stakeholders
Methods of delivery (i.e., online/class; modules/courses/trainings, certification): online trainings

Training provider name: APAVE ACADEMY
Website: https://www.apave.hu/Akademia.html
Type of provider (see list above): Business
Covered skills types (see list in *General Introduction*): • reduce the use of raw materials, energy, and water consumption, increase the use of renewable energy • adopt various preventative measures and recycling practices to minimise waste, in particular plastic and food waste • apply the principles of sharing economy • utilise sustainable procurement practices • adopt an environmental management system to plan, act, and monitor • apply and manage sustainability certification schemes
Methods of delivery (i.e., online/class; modules/courses/trainings, certification): online/class, certification

Training provider name: Learning Innovation Ltd
Website: https://www.learninginnovation.hu/
Type of provider (see list above): Private
Covered skills types (see list in *General Introduction*): • reduce the use of raw materials, energy, and water consumption, increase the use of renewable energy • adopt various preventative measures and recycling practices to minimise waste, in particular plastic and food waste • apply the principles of sharing economy • utilise sustainable procurement practices • integrate the specifics of environmental legislation into company's actions

• adopt an environmental management system to plan, act, and monitor
Methods of delivery (i.e., online/class; modules/courses/trainings, certification): online or classes certification

Training provider name: GREEN BRANDS
Website: https://green-brands.hu/
Type of provider (see list above): Private
Covered skills types (see list in *General Introduction*): Certified Sustainability Manager (CSM) • adopt an environmental management system to plan, act, and monitor • apply and manage sustainability certification schemes • use digital technologies to integrate smartness and sustainability
Methods of delivery (i.e., online/class; modules/courses/trainings, certification): online modules certification

Appendix 3. Examples of Social/Cultural training providers

Training provider name: 1. ELTE University   2. BME University   3. Milton University   4. Károli Gáspár University   5. Budapest Business School   6. Pécs University   7. Szeged University   8. Metropolitan University
Website: 1. https://www.elte.hu   2. https://www.bme.hu   3. https://uni-milton.hu/   4. https://portal.kre.hu/   5. https://www.uni-bge.hu   6. https://www.pte.hu/   7. https://www.u-szeged.hu   8. https://www.metropolitan.hu/
Type of provider (see list above):   Universities
Covered skills types (see list in *General Introduction*):   Communication and Media Science BSc   • interpersonal and intrapersonal skills;   • critical and innovative thinking;   • global citizenship;   • lifelong learning capabilities;   • competences for managing personal relationships, demonstrating empathy, and cooperating with others;   • showing a positive attitude, respect, inclusivity, and intercultural sensitivity;   • making appropriate contact and active listening skills;   • competences that promote social progress which recognizes the needs of everyone;   • cross-cultural understanding, supporting diversity, gender and racial equality;

Methods of delivery (i.e., online/class; modules/courses/trainings, certification):
 classes,
courses
diploma

Training provider name:
1.   Kodolányi University
2.   MATE University

Website:
1.   https://www.kodolanyi.hu/
2.   https://www.uni-mate.hu

Type of provider (see list above):
 Universities

Covered skills types (see list in *General Introduction*):
Protocol and International Relations continuing education
- interpersonal and intrapersonal skills;
- critical and innovative thinking;
- global citizenship;
- lifelong learning capabilities;
- competences for managing personal relationships, demonstrating empathy, and cooperating with others;
- showing a positive attitude, respect, inclusivity, and intercultural sensitivity;
- making appropriate contact and active listening skills;
- competences that promote social progress which recognizes the needs of everyone;

Methods of delivery (i.e., online/class; modules/courses/trainings, certification):
classes, online
 courses
diploma

Training provider name:
1.   Budapest Business School
2.   Corvinus University
3.   Metropolitan University
4.   MATE University
5.   Sopron University
6.   ELTE University
7.   Széchenyi István University
8.   Miskolc University
9.   Edutus University
10. Pécs University
11. Pannon University
12. Eszterházy Károly University
13. Szeged University
14. Kodolányi János University

15. Debrecen University
Website: 1. https://uni-bge.hu/hu/kepzesek 2. https://www.uni-corvinus.hu/ 3. https://www.metropolitan.hu/search/?expression=turizmus-vend%C3%A9gl%C3%A1t%C3%A1s 4. https://uni-mate.hu 5. https://lkk.uni-sopron.hu 6. https://sek.elte.hu/kepzesek/alapkepzesek 7. https://idforg.sze.hu/ 8. https://gtk.uni-miskolc.hu/ 9. https://www.edutus.hu/oktatas/alapkepzes/turizmus-vendeglatas/ 10. https://ktk.pte.hu/hu/kepzesek/alapkepzesek/turizmus-vendeglatas 11. https://www.gtk.uni-pannon.hu/turizmus-vendeglatas-alapszak 12. https://uni-eszterhazy.hu/gti/turizmus-vendeglatas-alapkepzesi-szak 13. https://eco.u-szeged.hu/ 14. https://www.kodolanyi.hu/felveteli/tanulmanyok/alapkepzes/turizmus_vendeglatas 15. https://econ.unideb.hu/
Type of provider (see list above): Universities
Covered skills types (see list in *General Introduction*): Tourism and Hospitality BSc and Tourism Management MA • interpersonal and intrapersonal skills; • critical and innovative thinking; • global citizenship; • lifelong learning capabilities; • competences for managing personal relationships, demonstrating empathy, and cooperating with others; • showing a positive attitude, respect, inclusivity, and intercultural sensitivity; • making appropriate contact and active listening skills;
Methods of delivery (i.e., online/class; modules/courses/trainings, certification): classes courses diploma

Training provider name: Learning Innovation Ltd
Website: https://www.learninginnovation.hu/
Type of provider (see list above): Private
Covered skills types (see list in *General Introduction*): • interpersonal and intrapersonal skills; • critical and innovative thinking; • lifelong learning capabilities;

• competences for managing personal relationships, demonstrating empathy, and cooperating with others;
Methods of delivery (i.e., online/class; modules/courses/trainings, certification): online or classes certification

Training provider name: Edutus University & Hungarian Hospitality Industry Association (MVI) & VIMOSZ (Atypical employment in the accommodation and catering sector project)
Website: http://vimosz.org/hazai-projektek/atipikus-foglalkoztatas-a-szallashely-szolgaltatas-vendeglatas-teruleten/
Type of provider (see list above): Association + University
Covered skills types (see list in *General Introduction*): In Northern Hungary (which is the least developed region of Hungary) we had some trainings for under-education persons (59) we the newly developed kitchen helper and assistant waiter education with some moduled content.
Methods of delivery (i.e., online/class; modules/courses/trainings, certification): online trainings

Training provider name: Jet Travel Ltd.
Website: https://www.jettravel.hu/
Type of provider (see list above): Business
Covered skills types (see list in *General Introduction*): • interpersonal and intrapersonal skills; • critical and innovative thinking; • global citizenship; • lifelong learning capabilities; • competences for managing personal relationships, demonstrating empathy, and cooperating with others; • showing a positive attitude, respect, inclusivity, and intercultural sensitivity; • accessible tourism provision for those with disabilities; • cross-cultural understanding, supporting diversity, gender and racial equality; • promoting fair pay and working conditions in tourism.
Methods of delivery (i.e., online/class; modules/courses/trainings, certification): online trainings

Training provider name:
Nemadomfel Alapítvány ("Don't- give- up" Foundation)
Website: https://nemadomfel.hu/
Type of provider (see list above): associations
Covered skills types (see list in *General Introduction*): Sensitization trainings   - demonstrating empathy, and cooperating with others;   - showing a positive attitude, respect, inclusivity, and intercultural sensitivity;   - making appropriate contact and active listening skills;   - competences that promote social progress which recognizes the needs of everyone
Methods of delivery (i.e., online/class; modules/courses/trainings, certification): online, classes trainings

Training provider name:
SOTER Tréningakadémia
Website: https://www.treningakademia.hu
Type of provider (see list above): Private
Covered skills types (see list in *General Introduction*):   - interpersonal and intrapersonal skills;   - critical and innovative thinking;   - global citizenship;   - lifelong learning capabilities;   - competences for managing personal relationships, demonstrating empathy, and cooperating with others;   - showing a positive attitude, respect, inclusivity, and intercultural sensitivity;   - making appropriate contact and active listening skills;   - competences that promote social progress which recognizes the needs of everyone;
Methods of delivery (i.e., online/class; modules/courses/trainings, certification): classes, online trainings

Training provider name:
Hungarian Tourism Academy
Website: https://www.turizmusakademia.hu/

Type of provider (see list above): NGO	

Covered skills types (see list in *General Introduction*):
    • competences for managing personal relationships, demonstrating empathy, and cooperating with others
    • protocol	

Methods of delivery (i.e., online/class; modules/courses/trainings, certification): online, classes	