

HITT Inception Analysis VIETNAM



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1. Introduction

1.1 The HITT Programme

The EC-funded High Impact Tourism Training (HITT) programme aims to make an increasing contribution towards sustainable pro-poor growth of the informal tourism sector in seven least-developed and developing countries in Sub-Saharan Africa and Asia. We aim to accomplish this by increasing the income and employability of informal and potential informal workers in the tourism sector by enhancing their skills through practical, market orientated training. It is the intention that other countries will be able to benefit from the global HITT approach that is being developed, piloted and refined throughout the three years of implementation.

The informal economy is defined by the International Labour Organisation as all activities that are performed outside the formal structures that govern taxes, workplace regulations and social protection schemes. Access to formal and non-formal education is often also very limited for informal workers.

In Vietnam the informal tourism workforce includes:

- **Micro enterprises** that employ only a few staff such as homestays, micro hotels, guest houses and small café and restaurants
- **Own-account workers**, such as cyclo drivers and street vendors
- **Dependent workers** that work in mainstream tourism enterprises such as hotels and restaurants that do not have labor contracts and associated benefits such as sick leave and insurance

While the Vietnam economy has been growing strongly, unemployment is high particularly in rural and remote areas and amongst ethnic communities. These are considered **potential workers** in the HITT Vietnam programme.

The HITT programme focusses on expanding access to practical and market-oriented vocational training for disadvantaged target groups, including women, youth, unskilled, semi-skilled, and potential workers, and aims to facilitate direct links with the tourism industry to maximise their opportunities to employment and income. In the case of Vietnam, there is also a focus on targeting ethnic communities because of the strong links between ethnicity and poverty which is a key government priority. (For example Prime Ministers' decision No 07/QD-TTg for the socio-economic development of poor communes in ethnic minority and mountainous areas).

SNV Vietnam is responsible for managing the HITT programme in Vietnam and is working in partnership with a local non-government organisation-the Vocational Facilitation and Consultancy Center for Underprivileged Youth (REACH) that specialising in vocational training and employment for Vietnam's most disadvantaged youth. REACH currently offers three month vocational training courses and job placements in the fields of hospitality, sales, customer relations and information technology and will be training over 2,100 students in 2011. As the tourism sector is mainly driven by private businesses, their support and commitment is critical to the sustainability of HITT training curricula.

The Inception Phase of the HITT Programme (February-December 2011) assessed the tourism and TVET sectors in each country with the aim of devising a global methodology as well as country-specific strategies and interventions.

1.2 The Operating Environment

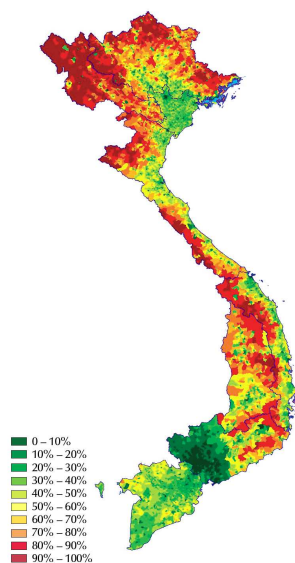
Economy and Poverty Levels

Vietnam is a developing country with an economy that has grown rapidly. GDP per capita was less than US\$ 400 in 2000 but has reached nearly US\$ 1,173 in 2010. This ranks Vietnam 138 in the world, a little lower than the world average GDP per capita.

The tourism sector is relatively young but is experiencing fast growth and making a significant contribution to the national economy. Available statistics show that tourism contributes an estimated 5.25% to the national GDP in 2010^[31].

Vietnam is now in the group of countries with middle income status, however the reality on the ground is that areas of Vietnam are still underdeveloped. The poorest households are located mostly in remote mountainous and coastal areas and on isolated islands. The poverty map below clearly shows the high level of poverty particularly in the mountainous areas of North West Vietnam.

Poverty Map



Sources: Minot, Baulch, and Epprecht 2003.

Education Levels

Education in Vietnam is very much a success story. The literacy rate of adults above 15 has reached 93.5%². According to the International Standard Classification of Education

¹VNAT annual report 2010

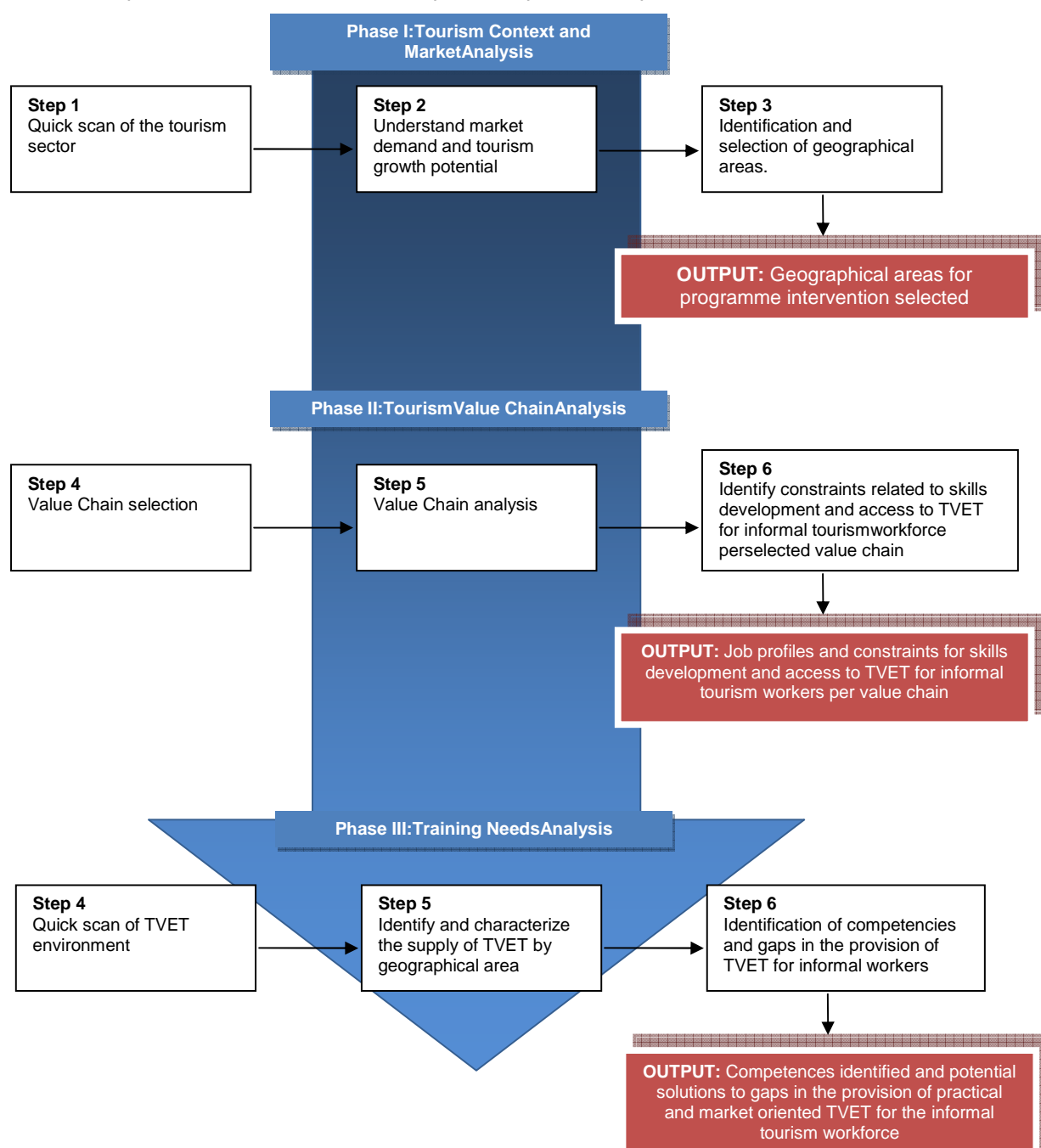
²Census population 2009, National statistic office

designed by the UNESCO, 18.9% of Vietnam's population aged 25 and above have a middle level of education and 5.4% have high levels of education (university level or higher). However, there is still considerable room for improvement with the UNESCO Education Development Index (EDI) ³ranking Vietnam 79th out of the 129 countries monitored. As detailed later in the report, there also significant deficiencies in market orientated tourism vocational training as well as constraints for those from disadvantaged backgrounds particularly in remote areas.

³ Ministry of Education Vietnam Committees UNESCO / Global Monitoring Report on Education 2008

2. The Methodology

With technical support of MDF, an international training and consultancy firm, SNV developed a practical methodology for the inception phase of the Programme. The approach has three phases, each with three steps and specific outputs as detailed below.



2.1 Adaptations

The methodology for the conducting situational analysis, value chain analysis and training need assessment in Vietnam is primarily conducted follow the MDF/SNV proposed methodology. However, due to the availability of existing information some adaptations to the HITT methodology were made to better suit local conditions in Vietnam. The key adaptations were:

- Conducting approximately 100 in-depth interviews with target beneficiaries (micro enterprises, self-account workers, dependent workers) during Phase 1 of the study in addition to key informants including tourism businesses and government stakeholders. This tool was an adaptation of Tool 2, 4 and 5. It proved to be very helpful in understanding market dynamics and obtaining a good understanding of some of the practical issues facing informal workers in specific sectors of the tourism industry. This research fed into all phases of the study.
- Visitor research focussing on service quality rather than more general tourism visitation data as in most destinations existing information was available. This was a replacement for the sample questionnaire in Tool 6. This survey of over 200 visitors also proved useful in identifying specific competencies in job profiles as it measured satisfaction across a range of factors from a visitor perspective.
- As suggested by Tool 14, a workshop with participation of TVET institutions, tourism enterprises were conducted to identify job profiles and required competencies. This workshop was customised into a half day instead of one full day, however the shorter time did not affect the quality due to good preparation and facilitation of the workshop.

Appendix 1 presents tools that have been used for collecting data of this study.

3. Tourism Context and Market Analysis

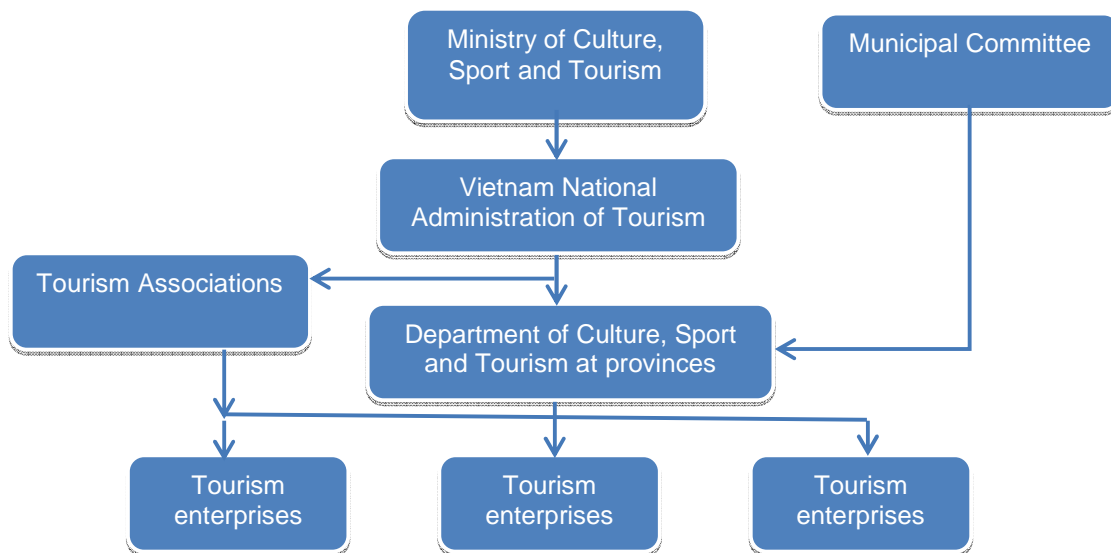
3.1 Overview of the tourism sector

3.1.1 Structure of the Vietnam Tourism Industry

Government

In 2008, Tourism became part of the Ministry of Culture, Sports and Tourism and the professional tourism management is under the day-to-day management of the Vietnam National Administration of Tourism (VNAT). At a provincial level, tourism is administered by the Departments of Culture, Sports and Tourism in all 63 provinces and cities. Each provincial department has its own tourism division. The basic structure of the tourism industry is detailed below.

Structure of Vietnam Tourism Industry



Industry Associations

The Vietnam Tourism Association was established in 2002 and now has over 260 direct members and 15 associations in the provinces and cities including Hanoi, Ho Chi Minh City, Hai Phong, Quang Ninh, Ha Tay, Thai Binh, Thanh Hoa, Nghe An, Thua Thien - Hue, Da Nang, Khanh Hoa, Binh Thuan, Lam Dong, Ba Ria - Vung Tau and Can Tho

It also has hundreds of chapters and associated clubs from different industries. In total, the Association has nearly 1,000 businesses covering all sectors of the tourism industry including tour operators, hotels, transport, trade fairs, handicraft villages, entertainment facilities and tourism schools. The Vietnam Tourism Association is also a member of the Vietnam Chamber of Commerce and Industry and the Asian Tourism Association. However,

the Vietnam Tourism Association is yet to play a leading role effectively coordinating the tourism industry.

Private Sector

Currently, 800 tour operators and travel agencies are licensed to deal with international travel and more than 10,000 others servicing the domestic tourism sector. Major tourism facilities include 12,000 accommodation establishments with 235,000 rooms, of which 388 are classified from 3 to 5 stars with 40,052 rooms available⁴.

Tourism is one of the sectors that attract a significant volume of foreign direct investment. The latest statistics show that there are 625 foreign invested projects in tourism with total registered capital of US\$12.258 billion.

Development Partners

Development agencies and NGOs are actively involved in tourism support. For example, the European Commission is funding an 11 Million Euro programme to encourage environmentally and socially responsible tourism in Vietnam. Lux Development also has a major project to improve facilities, curriculum and teacher capacity in nine formal tourism colleges across the country. Further details of these projects are detailed in later in this report. Donors and development partners such as the Japan International Cooperation Agency, AECID, the International Labor Organization and WWF are active in tourism in Vietnam and provide potential to be partners in implementing the HITT Programme.

3.1.2 Policy environment

Tourism Laws and Regulations

In Vietnam, businesses operating in the tourism sector must operate under the Enterprise Law. A business must be registered and licensed to operate legally. In addition, tourism enterprises are regulated by the Tourism Law and guiding Decree on Travel and the Hotel industry.

The Vietnam National Administration of Tourism is the agency in charge of issuing licenses for tour operators and travel agencies to service international and domestic visitors. A deposit of VND 250 million is required for an international travel agency and VND 10 million for a business licenses for a domestic travel agency. Under current requirements, tour guides must have either an international or domestic license to work. The tour guide licenses are issued by provincial Departments of Culture, Sports and Tourism. This is a potential impediment to informal workers as there are strict criteria of the issuing of licenses.

The Vietnam National Administration of Tourism is responsible for hotel classification for three to five star hotels, while provincial Departments of Culture, Sports and Tourism take responsibility of one to two star accommodation establishments. There is a specific requirement about the number of employees and professional training and certification required for each job title and position in the criteria for hotel classification. Household based accommodation businesses, such as guest house and homestay must have a business license issued by either a municipal city or district government office.

⁴ VNAT statistics

Tax Regulations

In recent years, the Government has adopted policies on tax reduction, tax exemption and tax payment extension for small and medium enterprises. However, these are limited to sectors such as agriculture, forestry, fishery processing and manufacturing with tourism not a priority area. While many hotels and travel agencies are investing significant amounts to import items such as hotel equipment and buses, they have to pay the import tax at the rate of consumables items which is high.

Tourism Investment

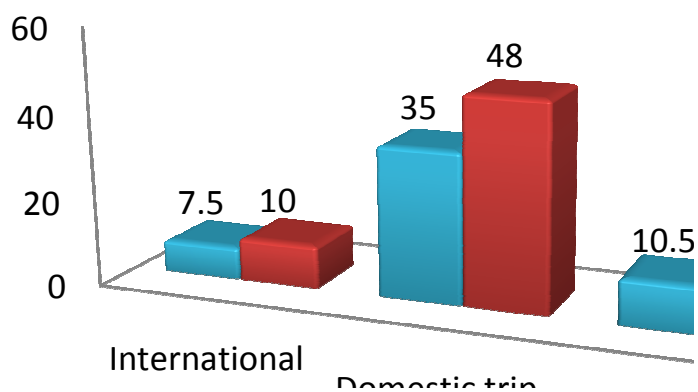
Over the last decade, the Government has paid significant attention to investment policies for tourism development. The national investment for tourism from 2001 – 2010 was VND 5,606 billion (US\$267 million), mostly for road access to tourism resorts and attractions. Improved access to more remote areas is opening up employment opportunities for women, youth and ethnic minorities in more remote areas. However, the vast majority of tourism investment is still concentrated near major tourism centers or along the coast.

Tourism Strategy

The Vietnam National Administration of Tourism has submitted to the Prime Minister for approval the Strategy for Tourism Development 2011 - 2020, with a vision to 2030. The strategy includes targets with the tourism industry expected to generate US\$ 10.5 billion in 2015 and US\$ 18 billion in 2020. There is a target of 7.5 million international visitors and 35 million domestic visitors by 2015. International and domestic tourists are expected to have an average length of stay of 7 days and 4.5 days respectively and spend an average of respectively US\$ 105 and US\$ 36.5 per day.

In 2010, international tourists stayed an average 6.5 days and spent US\$75 per day, domestic tourists trip length was an average 3.5 days and spend of US\$ 35 per day.⁵

Tourism Targets 2015



Source: Draft Tourism strategy to 2020, vision 2030, 2011

⁵ VNAT, National Statistical Office

3.1.3 Employment

Tourism Employment

Currently, the tourism industry generates about 480,000 direct jobs and 1 million indirect jobs. An estimated 43% of the direct workforce are educated or trained in tourism. University or higher levels of tourism education account for only 3.1% of the total workforce.

The future demand for labor on tourism is identified by the draft Strategy is 620,000 direct jobs by 2015 and 870,000 by 2020. The indirect jobs are expected to be more than two times the direct jobs generated.

The Informal Sector

In 2007, a Household Business and Informal Sector Survey revealed that the informal sector in Vietnam accounted for almost 11 million jobs out of a total of 46 million jobs, contributing 20% to GDP. This represents nearly a quarter of all main jobs (24%), with nearly half of non-farm jobs found in the informal sector. If main and second jobs are combined, a total of 12.4 million jobs are held in the informal sector. At the national level, "Manufacturing & Construction" is the largest informal industry (43% of total employment in the informal sector), followed by "Trade" (31%) and "Services" (26%) which includes accommodation and restaurants.

The 2007 study detailed some of the challenges facing Vietnam's informal sector. These issues were largely collaborated for the informal tourism sector through interviews conducted during this study.

- Precarious operating conditions – little access to public services and few have specific premises from which to run their business which limits their capacity to increase manpower.
- Low earnings and poor labour conditions – despite long working hours, earnings are low averaging 1.5 million VND / month # US\$100/month) and social security coverage is non-existent.
- The majority of workers are self-employed or family workers who have had schooling below the national average.
- Women are overrepresented and discriminated against – women comprise well over half the number of workers in the informal sector and men earn nearly 50% more than women.
- Female jobs are also more insecure than those held by men, and women less frequently have professional premises for their activity and are more likely to work outdoors.
- Lack of capital and low investment rate which contributes to the informal sector works on the fringes of the economy and as a "subsistence economy"

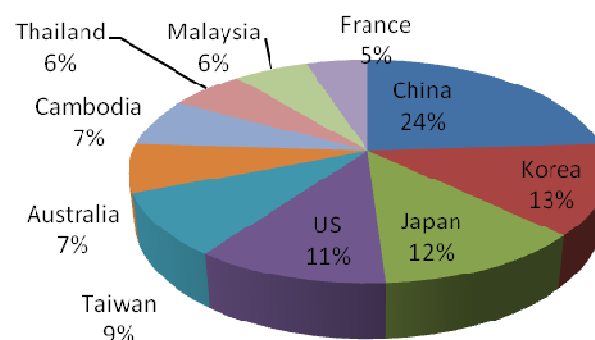
3.2 Market Demand and Tourism Growth Potential

Source Markets

The tourism sector in Vietnam has experienced rapid growth. In 2010, the number of international tourists to Vietnam reached a peak of 5,235,000 arrivals while domestic visitation also reached record levels with 28 million trips. International travel in 2010 was 30% higher than 2009 (the year that severely affected by the global economic crisis).

A majority of international tourism to Vietnam is intra-regional with Asian visitors making up 60% of the total. The key international markets include China, Korea, Japan, the United States of America, Taiwan, France and Australia. In the near future, growth is expected from ASEAN markets, Korea and Russian. The more mature western markets are more likely to travel to the remote mountainous areas given that trekking is a popular activity which benefits informal village tourism. The domestic market also has a higher propensity to travel widely throughout Vietnam given that they often have access to their own transport or are familiar with local bus networks. The domestic market is also more likely to stay at smaller hotels and eat at local restaurants which have a higher percentage of informal labor.

Top ten tourism source markets to Vietnam, 2010



Source: Vietnam National Statistical Office

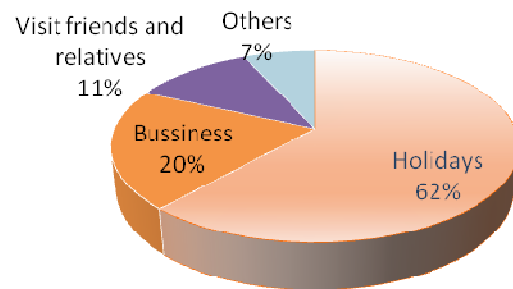
While international markets have been growing rapidly, Vietnam has not always attracted the most appropriate market segments. For example, 80% of Chinese visitors to Vietnam cross by land and most of them are from Guangxi province and enter Vietnam by using visitor pass /tourist card. The territorial range for them to travel within Vietnam is quite limited, visitors mostly travel in large groups and the spend is low. To date, Vietnam has not been so successful in attracting visitors from the large urban centers such as Beijing and Shanghai. Similarly, with the Korean outbound market the yield is quite low and there is a propensity to use Korean tour companies in Vietnam, not all of which are licensed.

As Vietnam matures as a destination, it is expected that beach and special interest tourism will grow and group tourism will decline.

Tourism Profile

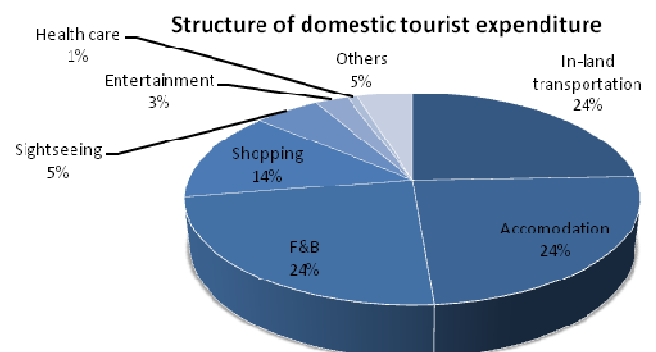
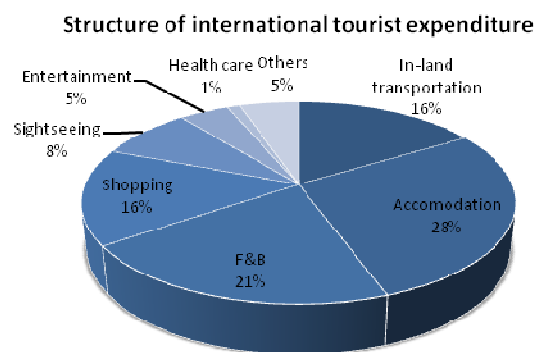
International visitors to Vietnam come mainly for holidays and leisure purpose, accounting for 62% of the market with business travelers accounting for an estimated 20%. The business travelers are less likely to fuel demand for informal labor given that they tend to stay at better hotels that are more likely to have staff on formal labor contracts.

Purpose of travel to Vietnam, 2010



Source: Vietnam National Statistical Office

The average length of stay of international tourists in Vietnam is estimated at 6.5 days with a spend of US\$ 75 per day. Free and independent tourists spend about US\$ 92 per day, half of this amount is for food and accommodation. International visitors travelling on a package tour spend an extra US\$ 60 per day in addition to the package cost. Half of this is for shopping for souvenirs and goods (Expenditure survey 2009 of Vietnam National Statistical Office). In Vietnam, silk, lacquer ware, paintings and handicrafts are popular purchases which generates demand for informal labour both in production and sales.



Source: Vietnam National Statistical Office

3.2.1 Market Segments

Mass tourism/Class Tour

Many international visitors to Vietnam take a traditional tour/trip that includes most of the major tourist destinations in Vietnam, from North to South or vice versa. This trip normally includes cultural heritage centers of Hue and Hoi An and natural heritage sites such as Ha Long Bay. In the north, in addition to the city experience of Ha Noi, Sapa and Ninh Binh are popular options. In the south, tourists often visit the Cu Chi and the Mekong Delta in addition to Ho Chi Minh City. Beach options such as Nha Trang and increasingly Mui Ne and Phu Quoc Island are also popular stop off points. The long-haul tourists from Europe, America are more likely to take the classic trip. The engagement with informal labor is less common with this segment, particularly the more upmarket travelers.

Beach/Resorts Holidays

In recent years there has been considerable investment in beach resorts especially in central Vietnam, running through provinces including Quang Binh, Hue, Da Nang, Khanh Hoa, Phu Yen and Binh Thuan. This investment has helped fuel growth in beach holidays with Nha Trang Bay one of the best known areas with a broad range of accommodation, attractions and other amenities. The area of Mui Ne in Binh Thuan province is also growing in popularity as a stand-alone beach destination particularly for the Russian, German and Australian markets. The growth in hotels is increasing demand for qualified labor which tends to mean that the smaller hotels and restaurants have to recruit unqualified staff which are often engaged on an informal basis. In addition, the growth in beach tourism tends to result in an increase in micro-businesses and self-account workers to service tourists such as laundries, small shops, boat, cyclo and motor bike (xe om) services.

MICE

MICE tourism is beginning to grow in Vietnam with investment in five star hotels and conference and exhibition facilities. In addition, company sponsored annual trips is an important source market for many resorts. MICE tourism tends to utilise three-five star hotels however it does increase the overall demand for labor especially over the peak summer period.

Short Break

Domestic tourists travelling on holidays and weekends are growing very fast due to improving economic conditions. There is also a growth in short breaks from neighboring countries such as China, Cambodia and Thailand. However, the current range of products and services in Vietnam does not adequately meet the demands of this market segment. In addition, there is often overcrowding at key tourism sites on weekends and public holidays.

Religious Tourism

The main source market for this type of tourism is domestic travellers. This market is characterized by large volumes of visitors as specific periods in the lunar calendar such as Tet. Pagodas such as HuongTich Pagoda (Hanoi), Ba Chua Xu Pagoda (An Giang), Ba Den "Black Lady" Pagoda (Tay Ninh) and the Hung Kings Temple (Phu Tho) are all popular destinations ta specific times of the year. This type of tourism has potential to generate significant informal tourism jobs such as food stalls and handicraft production and sales.

Corridor and Cross Border

Cross border and corridor tourism is growing due to cooperation between Vietnam and neighboring countries and improved infrastructure. The largest group is tourists from China travel to Ha Long Bay for beach holidays and combine visit to Hanoi capital or North West region. The second large group is tourists from Thailand cross Laos and travel to Vietnam's central coast for holidays. Presently, these tourists tend to travel directly through regional areas and stay at major centres. However, with appropriate product development there is opportunities to create

International Backpackers

Mostly from West Europe, North America and Australia, this segment likes to reduce costs for accommodation but spend up on experiences. The social aspects of travel are also important for this segment. Backpacker also tend to have a higher rate of interaction with informal tourism workers due to the hotels and restaurants used as well as the more adventurous nature of these travelers. A 2011 Monash University study into independent travelers in Vietnam found that 59% preferred to stay at accommodation and eat at restaurants owned by locals as it provided a more authentic experience. In addition, 51% preferred locally owned hotels and restaurants as the money went to local people.

Phuot - Vietnamese backpackers

This is a relatively new market segment and is mostly made up of students or young workers who use motorbikes to travel with friends to explore Vietnam's regional areas and tourist attractions. At destinations, they tend to use budget accommodation and dine at small local restaurants. Unlike international visitors, they are not dependent on tour companies or expensive hire cars with drivers that can cost US\$150 a day. The Phuot segment is likely to drive demand for informal labor in small hotels, homestays and local restaurants. The domestic market is also particularly interested in buying local produce to take home as well as lower cost handicrafts and herbal remedies.

3.2.2 Areas of growth potential

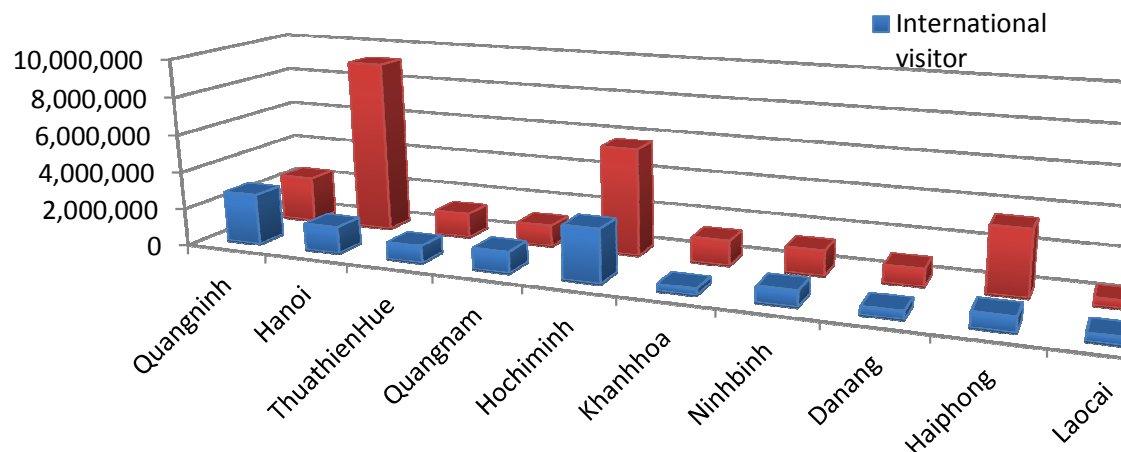
Vietnam has considerable potential for tourism development. For example, there are 13 cultural and natural heritage sites recognized by UNESCO as World Heritage. With 3,260 km of coastline 125 beaches, 4,000 islands and numerous bays and lagoons, Vietnam is also well placed to capitalize on beach and marine tourism. Vietnam has also considerable potential for nature-based, adventure tourism (such as rafting and kayaking) and eco-tourism given 75% of its terrain is mountainous, with 30 national parks and 164 nature reserves.

Market demand in Vietnam is still concentrated in areas with the world's cultural heritage sites and gateway cities (tourism hubs) such as Hanoi in the North and Ho Chi Minh City in the South. Ha Long Bay as a world natural heritage site is widely known and enjoying high number of tourists visiting this destination.

Areas with a high level of tourism development include Hanoi, Ha Long bay, Cat Ba island, Ninh Binh province, Sa Pa, Phong Nha Ke Bang National Park, Ancient capital of Hue, Hoi An ancient town, My Son Sanctuary, Da Nang city, Nha Trang bay and island, Mui Ne, Da Lat, Ho Chi Minh City, Can Tho province, Tien Giang province in the Mekong delta region and Phu Quoc island. However, there are also many other areas with tourism potential that have

not had investment in terms of tourism services and supporting infrastructure. The graph below shows visitation by province. Business and visiting friends and relatives travel is responsible for a significant share of domestic travel to Hanoi, Ho Chi Minh City and Hai Phong.

Top Ten Tourist Destinations, 2010



Source: Vietnam National Administration of Tourism, 2010

These tourist destinations all enjoy a growth rate greater than 10% a year. Quang Nam is expected to have the highest annual growth rate of 32%, followed by Hue (19%) and Quang Ninh (16%).

Future demand growth rate on top destinations

destinations	Growth rate
Quang NamTourist	32%
Quang Ninh	19%
Thua Thien Hue	19%
Ha Noi	17%
Ho Chi Minh	14%
Ninh Binh	13%
Da Nang	11%
Lao Cai	10%
Khanh Hoa	10%
Hai Phong	10%

4 Sub-sectors, geographical areas and occupations for programme intervention

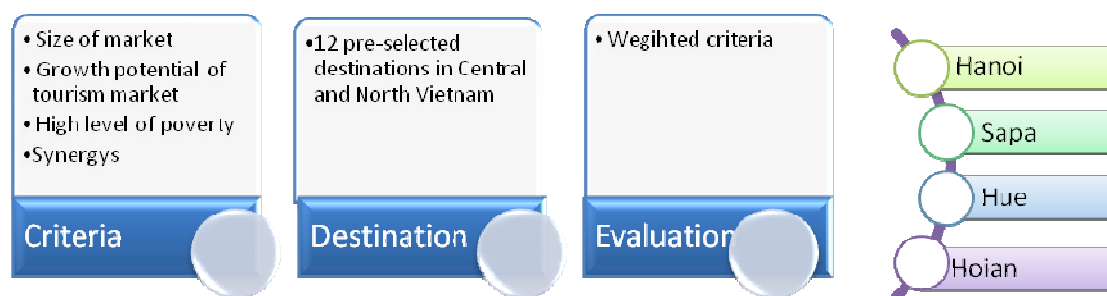
4.1 Selection of Geographic Areas

For the purpose of HITT, geographic areas considered in the inception phase were limited to central and Northern provinces. These are areas where there are high levels of poverty and also existing synergies with SNV's and REACH's operations. The project team considered that it would impact the chance of success to work in parts of Vietnam where REACH and SNV had no or limited experience.

On that basis, the method of selection was based on the following criteria and weighting:

- Size of existing tourism market (30% weighting)
- Potential growth of tourism market (20% weighting)
- High level of poverty (25% weighting)
- Synergy (25% weighting)

The size of the existing tourism market was considered the most important criterion as it is a pre-condition to have a thriving tourism sector to have a significant informal labor workforce. The potential growth of tourism was also considered important due to there needing to be sufficient demand for new trainees to enter the workforce. The high levels of poverty was also weighted high due to the overall target of HITT focusing on those from disadvantaged backgrounds. Synergy refers to implementation capacity of SNV and REACH as well as local partners within each specific area. In the case of Vietnam, there is strong growth throughout the country however by taking a more objective approach some areas particularly with a low existing base of visitors were ruled out as pilot areas.



The actual scoring was conducted by the HITT Vietnam team and verified at an expert seminar. See Appendix2 for the full scoring grid for the selecting of pilot geographic areas.

The final selection of areas for piloting are Hoi An (Quang Nam province), Sa Pa (Lao Cai province), Hanoi, Hue (Thua Thien Hue province). Given that a curriculum and training material will be developed and supported by a Train the Trainer Programme, other North West Provinces and inland Quang Nam would be considered if additional funding is available. As discussed in the final recommendation of the report, home-stay training will be

based on demand from partners as this training cannot be delivered in isolation from other intervention such as basic infrastructure and marketing.

4.1.1 Tourism in Hoi An (Quang Nam Province)

A total of 2,391,677 people visited Hoi An in 2010, 60% were domestic visitors and 40% were international. International visitors were twice as likely to stay overnight (40%) compared to their local counterparts (20%). The average length of stay for total visitors was 2.1 days, with international visitors (2.3 days) staying almost 50% longer than domestic visitors (1.7 days). Tourism generated an estimated 7,204 direct employees in tourism businesses in 2010 (Hoi An Visitor Survey 2011).

Hoi An Ancient Town is the key hook for visiting, followed by visiting My Son, food and learning about history & culture. Visiting Cham Island and the beach are also significant.

Western markets are the key international source markets for Hoi An, although there is also significant visitation from China and Japan given the cultural links with these countries. There was one a Japanese community in Hoi An when it was still a bustling trading port and there is still around 2,000 people of Chinese de cent living in Hoi An.

International Source Markets

No.	Market	Share	No.	Market	Share
1	Australia	12.9%	10	New Zealand	1.7%
2	France	10.6%	11	Denmark	1.6%
3	Britain	6.8%	12	Thailand	1.5%
4	Germany	5.8%	13	Italy	1.3%
5	USA	4.8%	14	Switzerland	1.1%
6	Japan	3.5%	15	Sweden	1.0%
7	Netherlands	2.5%	15	Belgium	1.0%
8	Canada	2.3%	16	Korea	0.7%
9	Spain	2.2%	17	Israel	0.6%
10	China	1.7%	18	Other	36.0%

Source: Quang Nam DoCST 2010

Up to 80% of tourists to Hoi An travelling for the purpose of tourism and recreation. Honeymoon is also a significant reason for visiting (11%).

4.1.2 Tourism Hue (Thua Thien Hue Province)

Hue, a heritage city, was the first site in Vietnam recognized by UNESCO tourists. In 2010 Hue attracted approximately 1.5 million visitors, of which around 600,000 were international tourists.

The largest international source markets are Thailand, France the USA, Japan and Australia. The Thai market travel by land along the Road 9. This market has seen significant growth from 2006 when this market accounting for around 7-8% of total international arrivals to more than 40% in 2010.

Hue has 77 hotels and 43 tour operators with an industry that generates 7,000 direct jobs. The Hue Department of Culture, Sport and Tourism industry estimates there are about 20,000 indirect jobs, mainly informal workers including micro businesses, handicraft/food vendors and local transport service providers (xeom, cyclo, boat).

The heritage sites are the key hook for both domestic and international visitors. In addition, Hue is a gateway for visitors to travel to neighboring destinations such as the DMZ in Quang Tri, Phong Nha Ke Bang World Natural heritage Site in Quang Binh and Danang/Hoi An Ancient Town. The business travel segment is also significant given Hue is also an important administrative center of the central region. Peak domestic tourism season is between April and September while peak international tourist season falls between September and February next year. The biannual Hue Festival Also attracts large number of international and domestic tourists. For the domestic market, local food such as Royal Cuisine, vegetarian food and local specialities is also a key attraction.

4.1.3 Tourism in Hanoi

The capital of Hanoi receives the largest number of tourists of any destination in the country. International tourists to Hanoi in 2010 reached nearly 1.5 million with about 9.2 million domestic visitors (not including the newly merged Ha Tay area). According to the Hanoi Tourism Department, an estimated 73% of tourists to Hanoi visit for rest and recreation, 12% for business and 15% for other purposes such as visiting friends and relatives.

Key international markets include China, Japan, France and Australia, followed by Korea, USA, Thailand and Malaysia.

Hanoi, as the capital city has many cultural attractions and historic sites. In addition, it is also a tourist hub and gateway for the Northern region. The major domestic source markets are Ho Chi Minh and the Northern provinces.

Tourist spending in Hanoi is quite high, an average US \$156 a day⁶ for international visitors and US\$ 49 a day for domestic tourists. Inner Hanoi has some of the highest land prices in the world, therefore services and goods are more expensive than elsewhere in Vietnam.

4.1.4 Tourism in Sapa (Lao Cai Province)

Tourists visiting Sapa accounted for more than 80% of visitors to Lao Cai Province (there were 380,000 international tourists and 378,000 domestic tourists to the Province in 2010). The main international source markets to Sapa are China, followed by the United States, France and Australia.

Sapa, an alpine town with an eclectic mix of restaurants, cafes, bars and ethnic communities, is surrounded by majestic, towering mountains and overlooks a deep valley of stepped rice terraces. For the domestic market the cool climate during the summer and the scenery are the key attractions. For the international markets, the rice terraces, ethnic communities and trekking are key hooks.

⁶ *Tourist expenditure survey, General Statistical Office, 2009*

4.2 Selection of Sub-Sectors

In order to identify sub-sectors of the tourism industry to focus the HITT training, a workshop with the HITT Vietnam Programme Team was conducted that scored potential sub-sectors against a set of targeting criteria and competitive criteria below with weightings indicated in brackets below. The pilot geographic areas were considered when evaluating the sub-sectors, however the potential of the sub-sector itself was the over-riding consideration given that the intention is for the HITT approach to upscale beyond the pilot geographic areas.

Targeting criteria:

- Number of target population in value chain (weighting 20%)
- Potential to increase employment for the target population (weighting 10%)
- Potential to increase income for target population (weighting 10%)
- Potential to increase income and/or employment for women, youth and ethnic minorities (weighting 10%)

Competitiveness criteria:

- Current market demand (weighting 20%)
- Growth potential (weighting 20%)
- Presence of lead firms or other partners willing to invest in value chain development (weighting 10%)

Priority Sub-Sectors

Through the workshop process and further deliberations by the project team including an industry validation workshop, four sub-sectors were selected: excursion, small hotels, home stays and cafes & restaurants.

The value chain scores (out of 10), the priority ranking and a brief rationale are detailed in the table below. The full scoring grid for the selection of sub-sectors is contained in Appendix 3

Value Chain	Score	Priority	Rationale
Excursion	6	High	Excursions, particularly local guides, have strong market demand from both visitors and tour operators and also include some of the most vulnerable groups.
Cyclo	4.5	Medium	Income for cyclo drivers is very low, however training would be difficult to organise and may not have significant impact in terms of increased income due to market demand. Cyclo drivers may be covered by excursions/guiding training as many are also informal "tour guides"
Boat	5	Medium	Boat drivers are not a large group and have some of the same issues as cyclo drivers. Interventions other than training such as forming an association may be more beneficial. Potentially could also be covered by excursions/guiding training.
Small Hotels	6.3	High	Micro hotels employ large number of informal workers, most who have not received any external training.

Home Stay	4.3	High	Homestays did not score highly against some of the criteria but are considered high priority as they are one of the few ways to generate tourism in remote mountainous areas which have the high levels of women and youth living in poverty. In addition, home stays are one of the few ways that ethnic communities can enter the accommodation sector due to the low start up costs.
Cafes & Restaurants	7.4	High	This value chain has strong growth, employs large number of informal workers, particularly women and youth, and most workers have not received external training.
Metal & Wood Products	4.7	Medium	Handicrafts production and sales have the potential to benefit some of the most disadvantaged groups. However, organising training for handicraft producers and vendors is difficult due to a lack of associations. Interventions other than only training would most likely be needed which is outside the scope of HITT.
Embroidery	5.1	Medium	
Silk Products	6.6	Medium	
Food vendors	5.5	Medium	Food vendors would benefit from a range of training such as food safety, food preparation and marketing. However, the impact of training on income may not be significant.

4.3 Analysis of Sub-Sectors and Occupations

4.3.1 Home-Stays

Homestays are becoming more prevalent in Vietnam, particularly in the mountainous north east of the country including Sapa, Mai Chau, Bac Kan and Cao Bang. Homestays are also found in Cu Lao Cham, off the coast of Hoi An as well as in Hoi An itself and in and around Hue.

Homestay services are delivered by family owners, who normally receive limited training. Homestays typically offer basic accommodation and meals with some also offering cultural performances and local tours. Many of the families are from ethnic minorities.

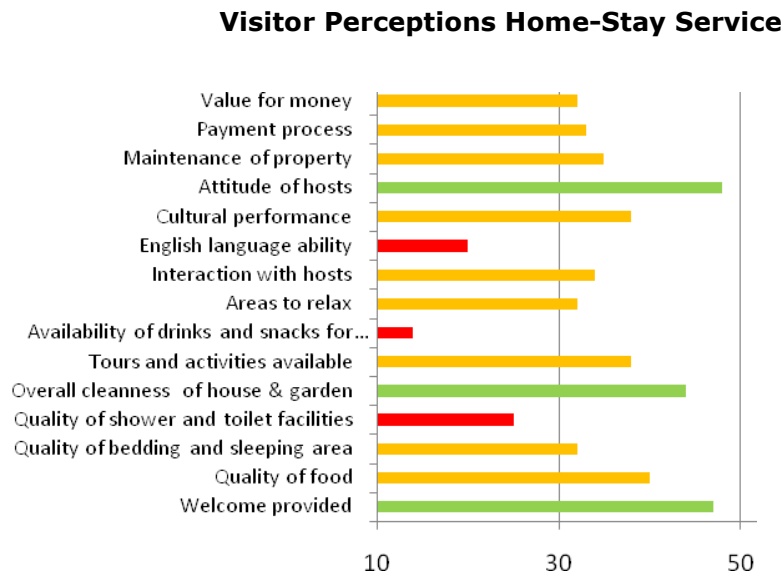
Local tour operators and hotels in town are very influential in determining which homestays visitors could use. Homestay operators need to engage with tourism operators who provide most of their customers. However, they are normally very reactive with little power in the relationship. In some areas, community tourism management boards exist that have a rotation system. Nevertheless, many tour operators still go direct to the homestay of their choice. Homestay operators in general do not have the capacity to market themselves directly to visitors or tour operators.

Women are often very active in running the homestay. Younger family members are also often involved in the kitchen and housekeeping (normally women) as well as guiding and maintenance (normally men). However, overall management and use of funds from the Community Management Board is often male dominated.

Market Perceptions

In a survey of home stay visitors, the highlights of staying at a homestay including interaction with the hosts, meeting other travellers, seeing the village, the food and cooking

and eating with the family. Visitors were also asked to rate the quality of the experience covering a range of factors. Focussing on the percentage very satisfied, the attitude of hosts, the welcome provided and overall cleanliness rated the highest (green bars) while the availability of other food and drinks, quality of shower and bathroom facilities and English language ability were the lowest (red bars).



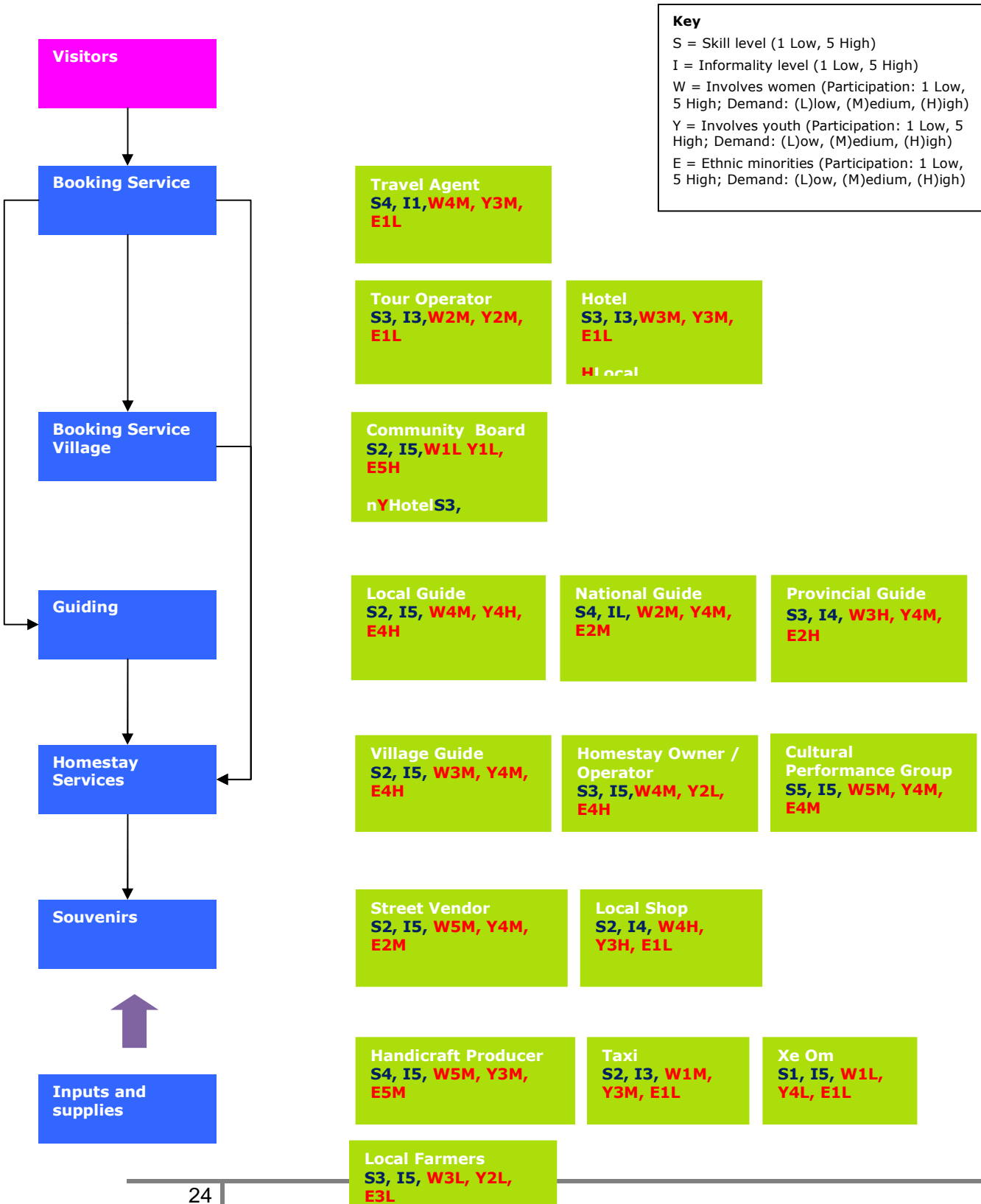
Source: HITT Vietnam Survey 2011

Overall, the home stay experience rated well which is likely to be a combination of visitors genuinely enjoying the experience as well as lower expectations about service quality. In an open ended question, suggested improvements included more interaction with hosts, limiting the number of guests at one time and proving better information including directions.

Home Stay Value Chain Map and Occupations

In order to identify occupations for the home stays, the value chain for home stays were mapped with specific occupations rated for the skill required, level of informality, and involvement of women, youth and ethnic minorities as per the Key below.

Home Stay Value Chain



Targeted Occupations, Tasks and Competencies

There are a number of potential occupations in the home stay value chain, however it makes sense to focus on the home stay operator as new entrants can help stimulate the associated jobs and inputs. In addition, many of the associated jobs tend to be conducted by family members or others in the community who normally participate in the training which is often conducted at a commune level. In addition, home stays tend to have a high participation of women, ethnic minorities and rural poor.

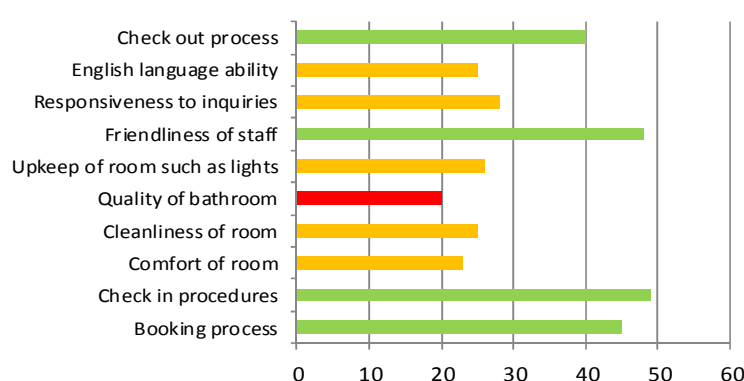
Through an industry workshop and based on interviews with home stay owners, tour operators and visitors, the following tasks and competencies have been identified.

Occupation Profile: Home Stay Operator		
General Tasks <ul style="list-style-type: none">• Welcome visitors• Prepare home stay for visitors (cleaning, put out bedding and mosquito nets)• Cook for tourists (normally dinner and breakfast)• Interact with visitors and explain local culture, traditions and customs• Introduce tours and attractions at local• Guide tourists to visit local attractions upon request• Ensure hygiene and safety for tourists• Marketing of home-stay		
Functional Skills <ul style="list-style-type: none">• Receive reservations by phone, email or in person• Initial welcome• Handle guest arrivals and departures• Hygiene, general safety/security for tourists and food safety• Basic English communication skills /basic information for tourists (written information and basic conversation)• Housekeeping skills & maintenance• Basic cookery and F & B service skills• Knowledge of local culture/traditions and attractions• Basic guiding skills• Basic marketing skills• basic book keeping skills & billing• Understanding the tourists		Priority Skills <ul style="list-style-type: none">• Communication skills• Marketing skills

4.3.2 Small Hotels Sub-Sector

Small hotels for the purpose of the HITT project are defined as having less than twenty staff. These hotels are found in large numbers throughout Vietnam including the areas that will be the focus of the HITT training. These businesses tend to be either family run or owned by a company with multiple business interests. Interviews conducted with hotel managers revealed that very few had formal training. Staff were typically employed through personal contacts, often came from villages with little previous experience to keep staff costs low and received no formal training.

Visitor Perceptions Small Hotel Service



Source: HITT Vietnam Survey 2011

The two key recommendations from visitors utilising small hotels were to improve the basic facilities and to enhance cleanliness standards. While it is difficult through training to address the basic facilities, better standards of hygiene and improved touches through better house keeping (such as flowers in the room) can add more personality to a hotel.

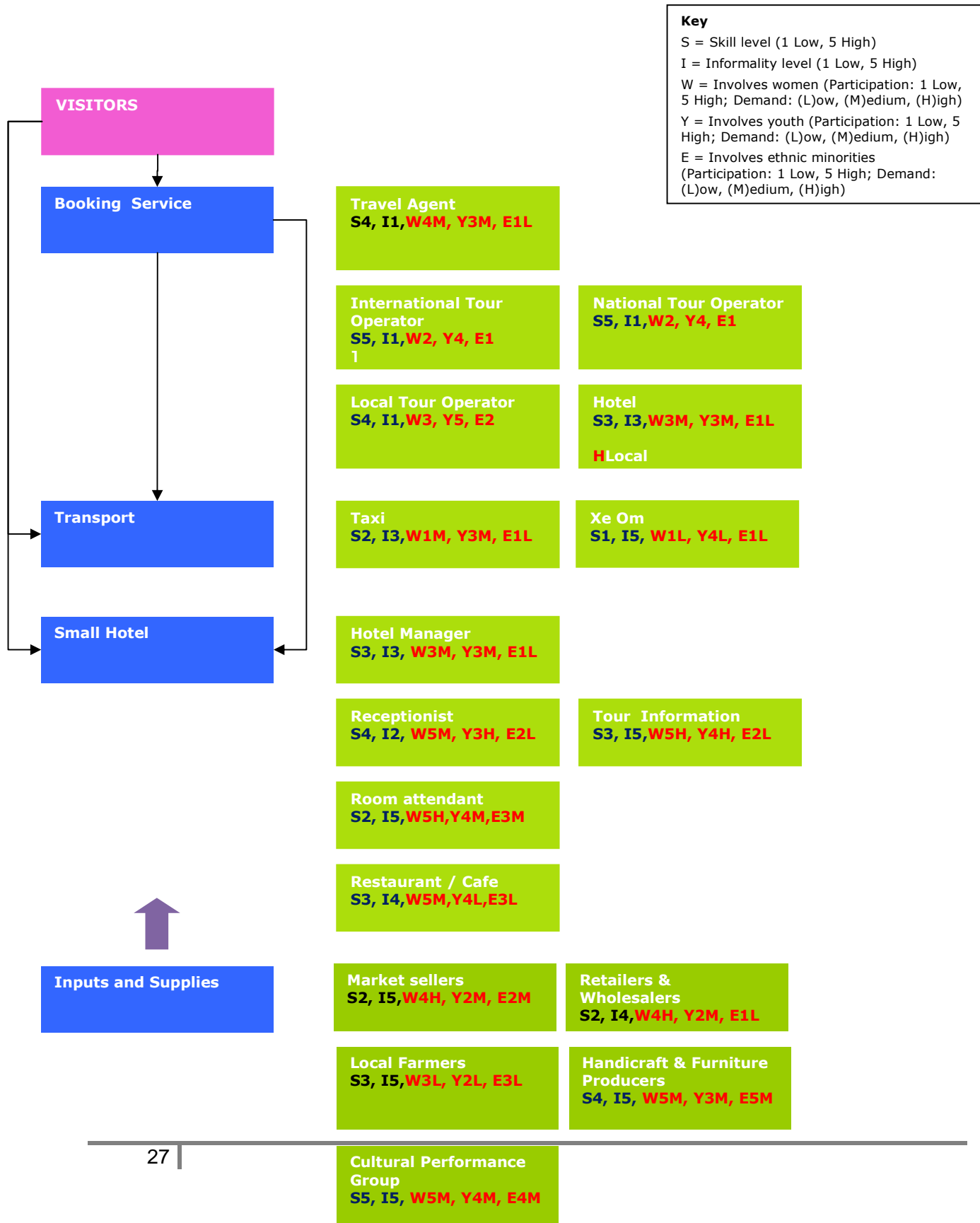
Small Hotel Value Chain and Occupations

Free independent international travellers and domestic tourists however will generally go direct to the hotel with their preference often based upon word-of-mouth advice from families, friends or colleagues. Small-hotels actively market themselves via the web and other local websites through accommodation listings however there are some barriers towards them achieving this for international accommodation listing websites which generally discriminate against lower end accommodation suppliers. With little-to-no finance to otherwise market their establishments internationally, micro-hotels depend heavily on the domestic market and relationships struck with local tour operators.

Small-hotels are highly dependent on the informal sector for workers who normally fill the roles of room attendants and waiters / waitresses. Informal workers actively seek out work opportunities through 'door-knocking' or word-of-mouth / informal networks. Formally trained workers are mostly able to find employment in medium- to-large hotels and resorts.

In order to identify occupations for small hotels, the value chain for small hotels was mapped with job profiles rated for the skill required, level of informality, and involvement of women, youth and ethnic minorities as per the key below.

Small Hotel Value Chain



Targeted Occupations, Tasks and Competencies

Small hotels offer a range of occupations including hotel manager, receptionists, food and beverage servers, chef, room attendants and book keepers. The occupation of room attendant has been selected as there is a high participation of women and informal labour. There is also high market demand given the strong growth of the hotel sector in Vietnam. In addition, the occupation of room attendant is suitable for new entrants with limited training. Through an industry workshop and based on interviews with hotel owners, tour operators and visitors, the following tasks and competencies have been identified.

Occupation Profile: Room Attendant	
General Tasks <ul style="list-style-type: none">• Cleaning and preparing rooms• Cleaning and maintaining public area	
Functional skills: <ul style="list-style-type: none">• Servicing guestrooms• Servicing bathrooms• Caring for linen• Cleaning equipment• Reporting maintenance problems• Safety, security and control procedures• Interacting with hotel guests	Priority Skills <ul style="list-style-type: none">• <i>Servicing guestrooms</i> and bathrooms• Basic communication• Hygiene understanding• Personal presentation

4.3.3 Excursions Sub-Sector

In primary tourist destinations including Hoi An, Sapa, Hue, Hanoi many people are involved in guiding tourists. Local and inbound tour operators are almost always licenced and generally employ formal nationally qualified tour guides - although the guides may not be on formal employment contracts.

Although a national tour guide with formal licence is required by law to guide and provide interpretation to tourists to the destination. In practice, due to the demand and condition at attraction sites, especially at rural and mountainous areas, there are many local people who act as informal local guides to take tourists and national guides to visit attractions and interpret the values or tell stories about the sites. Thus, there has been a large pool of informal, unqualified, tour guides who are hired by companies to work during peak seasons. These guides work on-demand due to their detailed knowledge and understanding of the destination/attractions.

In villages frequented by tourists, largely untrained and unqualified local guides are used. These 'local hosts' are normally young people and may be male or female. In the Northwest region of Vietnam such as around Sapa, ethnic minority people such as the H'Mong and Dao are often employed as tour guides.

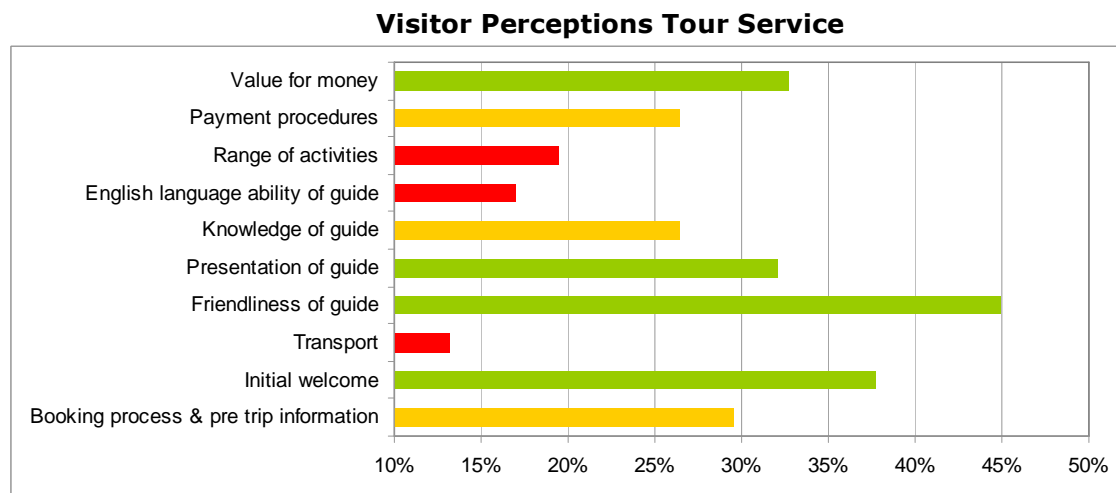
In Hanoi, Hue and Hoi An, local transport service providers such as boat men, cyclo/motorbike drivers, boatmen may also be involved in guiding.

Freelance tour guides are highly dependent on tour operator companies or hotels engaging them for work. Informal guide work is mostly 'reactive' with little power in the relationship between guides and the tour operators and accommodation providers.

Excursion value chain also involve many local actors to provide tours and related services such as transport (boat, bicycle, motorbikes, taxi and cyclos); food and beverage, handicraft sale and production; and culture performance.

Market Perceptions

Visitors were also asked to rate the overall quality of their experience in the planning and undertaking of their tour for a range of factors. Friendliness, presentation of the guide, initial welcome and value for money rated the highest, whilst transport, English language ability of the guide and the range of activities rated the lowest.



Source: HITT Vietnam Survey 2011

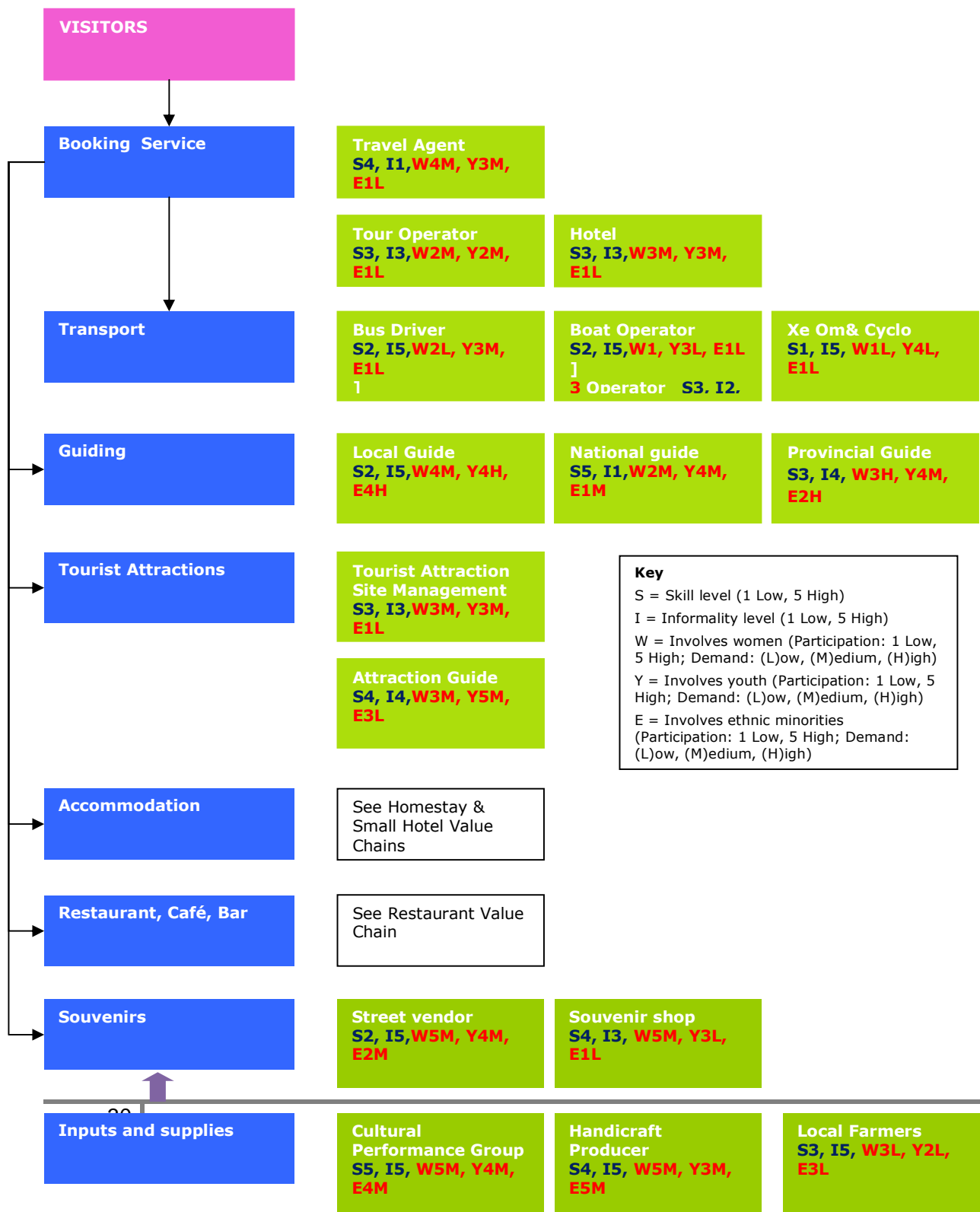
In an open ended question, suggested improvements included improving English proficiency, tour guide professionalism, the quality of transportation, and tour organisation.

Excursions Value Chain Map and Occupations

International tourists usually book tours through a domestic and / or international booking service that will then arrange the tour through a local tour operator often using certified national tour guides. Free independent travellers will often arrange their tour from their hotel or local tour operator. In the case of Sapa this is more likely to involve local ethnic minority tour guides. Overnight tours almost always use village homestays for accommodation with meals also provided by the homestay operators. Tours within a village usually incorporate a local village guide to local attractions. In Sapa tours will often involve a visit to village markets which provides direct benefits to handicraft vendors, as well as the observation of a cultural performance which benefits local performance groups. Informal tour guides in Hue and Hoi An are often those who provide transport service like cyclo, boat

and motorbike. Average income for informal tour guides range from \$VD 1.5million - \$3million (\$UD70-\$US150) per month. Senior H'Mong tour guides in Sapa whom could speak English well could earn up to \$UD300 per month.

In order to identify potential occupations, the excursions value chain was mapped with specific occupations rated for the skill required, level of informality, and involvement of women, youth and ethnic minorities as per the Key below.



Targeted Occupations, Tasks and Competencies

The key occupation would be a local guide we envisage that this training could also cover others that act as highly informal tour guides as they work on the 'tourism front line' and often provide information, assistance and sometimes accompany tourists to key destinations / attractions.

Through an industry workshop and based on interviews with tour operators and visitors, the following tasks and competencies have been identified.

Occupation Profile: Local / Village Based Guide		
General Tasks		
<ul style="list-style-type: none">▪ Leading tourists to visit attractions and interpret and explain the values of attractions▪ Keep tourists informed about the condition and regulations at the destination/attractions▪ Help tourists book services at local destination upon request▪ Help tourists communicate with local people and vice versa▪ Take care of tourists when leading the tour		
Functional skills		Priority Skills
<ul style="list-style-type: none">▪ Security, safety and First Aid▪ Initial welcome▪ Handle guest arrivals and departures▪ Excellent logistical skills (coordinating transport, accommodation, food and beverages)▪ Knowledge about culture and tradition; tourist attractions and local tourism products/services and environment.▪ Basic tour guiding skills: welcome, information, manage group, itinerary▪ Understanding the tourists▪ Knowledge about regulations of tourist sites▪ Fluency in Vietnamese and /or English language▪ Ability to ensure safety and security for tourists▪ Time management		<ul style="list-style-type: none">▪ Communication skills, including body language▪ Personal presentation▪ Customer care: Handling customer complaints & problem solving

h4.3.4 Restaurant & Café Sub Sector

Vietnam has a highly social culture within which food plays a central role. Restaurants and cafes are highly prevalent and can be found everywhere from the smallest village to practically every street corner in the city. In terms of outlets servicing international tourists, Sapa, Hue, Hanoi and Hoi An all contain a large number of restaurants, cafes and bars of international standard that are frequented by tourists.

Small restaurants and cafes tend to be family owned and operated with family members often multi-tasking. For example, the waitress may also assist in food preparation, act as the maitre'd and help clean. The majority of employees in small restaurants and cafes have little or no formal training in food and beverage service, with training being provided in general on-the-job by the owner / operator. Small restaurants and cafes are highly dependent on the informal sector for workers. Informal workers actively seek out work opportunities through 'door-knocking' or word-of-mouth / informal networks. Formally trained workers are generally employed in medium to large hotels and resorts whilst workers with little or no training or experience are hired in smaller restaurants and cafes.

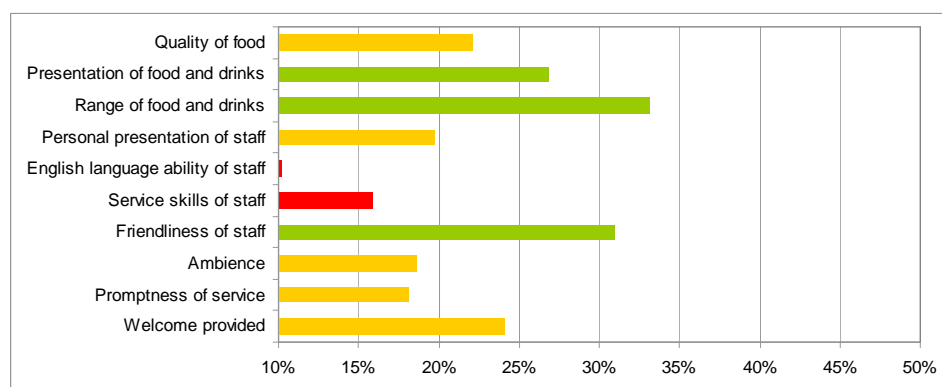
Overall there is a predisposition for more women to work in this sector than men, however in the smaller, family-owned and operated businesses it is simply determined by the make-up of the family unit. Lower level staff or almost entirely youth. On average, ethnic minorities are not well-represented, possibly as a result of most restaurants / cafes being Kinh-owned and operated.

In general tourists will walk into a restaurant or café 'off the street' often as a result of a referral from a guide book or recommendation from a family member, friend or hotels concierge / front desk attendant. In some instances restaurant meals may also be included in package tours as determined by the tour operator. Breakfast is normally included in most 3 star plus hotels. Homestays will normally provide all meals for the duration of the guests' stay. Restaurants, cafés, and the aforementioned accommodation providers generally purchase food supplies directly from local markets, however some tour operators will also bring food ingredients for homestay operators to use in order to ensure a particular standard is met.

Market Perceptions

In a survey of visitors who had eaten at a restaurant or café in Vietnam, highest satisfaction pertained to the range of food and drinks available, followed by the friendliness of staff, and the presentation of food and drinks. The English language ability however was rated critically low, and the service skills of staff also rated poorly.

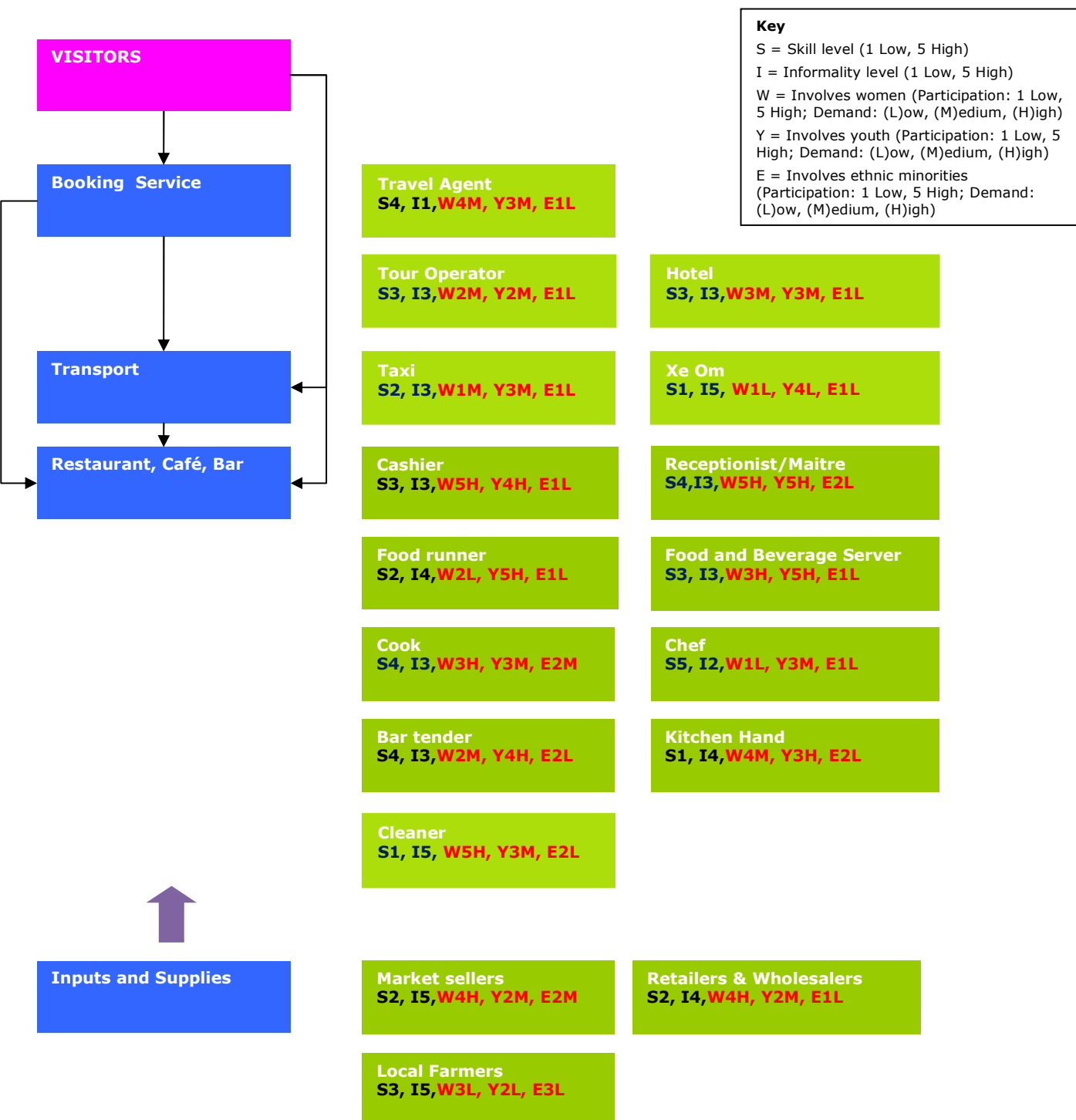
Visitor Perceptions Restaurant and Café and Service



Source: HITT Vietnam Survey 2011

Restaurant and Café Value Chain and Occupations

In order to identify occupations for small restaurants and cafes, the value chain was mapped with occupations rated for the skill required, level of informality, and involvement of women, youth and ethnic minorities as per the Key below.



Targeted Occupations, Tasks and Competencies

There are a number of potential occupations in the restaurant & café value chain, however, the key occupation that will be targeted is the food and beverage server. This is where there are the greatest number of jobs, strong market demand, and also tends to have a very high participation youth and relatively high participation of women.

Through an industry workshop and based on interviews with restaurant and café owners/operators and visitors, the following tasks and competencies have been identified.

Occupation Profile: Food & Beverage Server	
General Tasks <ul style="list-style-type: none">▪ Receive order from guests▪ Introduce menus to guests and advise on specialties▪ Set up and clear table▪ Serve food and beverages▪ Take care of guests while eating▪ Present bills to guests	
Functional Skills <ul style="list-style-type: none">▪ F&B serving skills▪ Knowledge of food▪ English▪ Food hygiene▪ Billing▪ Food preparation▪ Safety & security	Priority Skills <ul style="list-style-type: none">▪ Communication skills, including body language▪ Personal presentation▪ Observation skills▪ Customer care; Handling customer complaints & problem solving

4.4 Constraints related to skills development of the HITT target groups and access to TVET

Detailed below are the constraints relating to skills development for the four selected sub-sectors of the tourism industry.

4.4.1 Home-Stay Constraints

Access to Practical and Market-Oriented Vocational TVET

Homestay operators do not have the finance to enrol in private or college based training courses and training is restricted to sporadic NGO or government training programs and does not sufficiently cover all operators. Skills learnt by homestay operators are readily applicable to entry level positions in the accommodation and excursions formal sector (e.g. housekeeping, cooking, tour guiding). Cooperation between tour operators and homestay operators for investment in facilities and marketing homestay products is often weak.

Gender and youth sensitivity

Homestays are almost entirely owned and operated by ethnic minority people and several rural villages of Kinh-the major minority people. Commitments in the village (e.g. farming, social events) affect homestay operators' ability to operate reliably throughout the year. Women are highly involved in homestay operation and naturally poses good hospitality skills (e.g. housekeeping, cooking). Men are naturally suited to homestay maintenance activities and tour guiding (although this may also be shared by women). Overall management and use of funds from the Community Management Board is often male dominated

Factors influencing decisions on quality standards, skills requirements, price

Existing homestay operators often are weak at customer service, English language and marketing of their business and other value added products such as snacks, drinks and souvenirs. Price is often fixed for accommodation and food. In addition, price for homestay accommodation in the Northwest is rather low (\$3-4) due to unhealthy competition and influence of tour operators.

Quality of food and related services are not often get hishest satisfaction of guests because of homestay operators don't understand well the taste and needs of guests. In addition, due to low number of visitors and seasonality, home stay operators do not practice their services very often which also influence their hospitality skills.

Skill gaps to access market and increase productivity and income

Homestay operators, particularly those from ethnic minorities, generally have low levels of education. This affects their capacity to implement strategies to better access the market and develop alternative income generating opportunities such as sales of snacks, drinks, handicrafts and village tours.

Homestay operators in general already possess the core skills required in hospitality, however tend to be less knowledgeable in the specific requirements for hosting foreign visitors including cooking 'westernised' Vietnamese food, bedding standards, hygiene and a basic proficiency in English. Skills learnt by homestay operators are readily applicable to entry level positions in the accommodation and excursions formal sector (e.g. housekeeping, cooking, tour guiding).

4.4.2 Small Hotel Sub-Sector Constraints

Access to Practical and Market-Oriented Vocational TVET

Small hotel staff generally do not have the finances to enrol in private or college based training courses and generally have little time to attend training as staffing is often limited and they are required on the job. In addition, management is not generally supportive of staff attending training and are often not formally trained in tourism or hotel operations themselves.

For new entrants in major destinations, a range of training option are available from short courses through to formal tourism education. However, in more remote area training options are extremely limited. Rural youth, particularly those from ethnic community, often drop out of school early which becomes a significant barrier to vocational education.

Gender and youth Sensitivity

Women and youth are well-represented in micro-hotels and often employed as housekeepers, food and beverage attendants, or as receptionists. In places where staff are sourced from rural (or other distant areas), family commitments can often make staff unreliable and places a strain on management who must source and retrain staff more often.

Skill Gaps which Restricts Access to Market

Although working conditions in hotel is suitable for young people, however, the Kinh ethnic majority have more advantage to be employed rather than ethnic minority people. Most small-hotels are owned/operated by the Kinh (the Vietnamese majority) who tend to hire Kinh staff over ethnic minorities making it difficult for ethnic minorities to find work in the sector. In addition, ethnic minorities are less likely to have high levels of education which affects their capacity to gain employment in the sector.

Most small hotel staff do not have fulltime employment contracts with their employer and tend not to have undertaken a course in hospitality which restricts their likelihood of being employed by higher-end and higher-paid establishments such as 3 star and above hotels and resorts.

Factors influencing decisions on quality standards, skills requirements, price

Rates of pay for staff are largely determined by micro-hotel operators with destinations with an oversupply of rooms and high competition paying limited wages. As a result staff are often sourced from rural areas with workers subject to long working hours, limited- if-any days off, or few other benefits. Quality standards are generally set by management who themselves often have little or no formal training in hospitality management. Lack of marketing skills and awareness of additional income generating opportunities and methods of sale is also restricting micro-hotel owner / operator's ability to increase their income.

Skill gaps to access market and increase productivity and income

Key deficiencies are in the areas of housekeeping, customer service, problem resolution and English language proficiency. Most small hotel staff have a limited understanding of the needs of the international market including likes and dislikes and how to effectively cater to them.

There is a need for building skills of both manager and staff of small hotel to *increase productivity and income*, however, training program should consider a two-tiered approach of management and staff training will be required for broader success as well as time for staff to attend training courses.

4.4.3 Excursions Constraints

Access to Practical and Market-Oriented Vocational TVET

Village based guides generally don't have ready access to training. Any little training outside of the job tends to be provided by NGO's or Provincial Departments of Culture, Sport and Tourism however this is neither comprehensive nor wide-spread. The national tour guide training course is expensive, requires a high level of education and time-consuming thereby inhibiting access for most people. Any tour guide training outside of the job tends to be

provided by NGO's or Provincial Departments of Culture, Sport and Tourism however this is neither comprehensive nor wide-spread. Village based guides are often still bound to their duties and commitments in the village and are unable to work full-time throughout the year.

Ethnic minority people are often well represented as freelance tour guides due to their local knowledge of the culture and environment as well as their good English proficiency that has been developed on the streets whilst working as handicraft vendors

Gender and youth Sensitivity

Tour guiding is a popular job for young people. Whilst women are highly involved in tour guiding a potential latent issue starting to surface is of female ethnic minority tour guides being stigmatised by the men in the family or village for working and socialising with tourists. This may eventually affect the ability of young female guides to build a career as local guides in the future.

Factors influencing decisions on quality standards, skills requirements, price:

Village based/local guides are largely dependent on tour operator companies to engage them for work however this work is generally seasonal and unreliable. Tour operators who hire local guides generally set the rate of pay. In destinations with a high demand for excursions and a high supply (sometimes oversupply) of tour guides including Sapa, pay rates are generally low and fairly inflexible.

Skill gaps to access market and increase productivity and income

Tour guides generally need quite specific skills in communication (Vietnamese and English) and the interpretation of local culture, history and the environment. Logistics (including group management), understanding the tourist, customer service and problem solving skills are of high importance. A fair degree of fitness and training in First Aid and safety is also generally required. Finally, knowledge of tracks, trails and routes is also generally required. Oft-cited weaknesses of informal tour guides includes weak English communication skills, lack of understanding about international tourist needs, and difficulties in problem solving which hinders their ability to obtain more consistent work with tour operator companies.

4.4.4. Restaurant and Café Constraints

Access to Practical and Market-Oriented Vocational TVET

Restaurant and café staff generally do not have the finances to enrol in private or college based training courses. The staff have little time to attend training as staffing is often limited and they are required on the job

Training of restaurant and café staff is generally undertaken in-house by the owner / operator. However, with most owner / operators also not having attended a formal food and beverage service or food preparation course, staff generally receive insufficient and inadequate training. The capacity building of managers in correct food and beverage service and production is therefore of equal (if not more) importance as the training of their staff.

With most restaurants & cafés owned / operated by Kinh, as ethnic minority people often have lower education and hospitality skills than Kinh people, they do not appear to have the same level of employment opportunities as their Kinh counterparts.

Gender and Youth Sensitivity

There is little gender bias pertaining to the accessibility of either men or women to work in the value chain although some roles such as cleaning are more traditionally associated with women. Village women with families however are somewhat more constrained in their ability to fully participate in the value chain as they are still expected to manage their traditional duties at home (e.g. looking after her children, housekeeping, gardening) on top of their paid work. Lower level staff are almost entirely young. On average, ethnic minorities are not well-represented within the value chain, possibly as a result of most restaurants / cafes being Kinh-owned and operated.

Factors influencing decisions on quality standards, skills requirements, price:

Whilst restaurant and café operators in general appear to place value in external training of food and beverage service and production staff, bad habits may persist if the awareness of managers is not also addressed and training is reinforced in practice.

Skill gaps to access market and increase productivity and income

Restaurant and café staff are naturally hospitable and as such have the foundations for good customer service. There is however still considerable room for improvement with key skills shortages including English language proficiency, managing customer complaints, food hygiene, and western food preparation skills.

A lack of marketing skills and awareness of additional income generating opportunities and methods of sale is also restricting restaurant and café owner / operator's ability to increase their income and that of their staff.

Whilst many are also acutely aware of these problems they either do not have the knowledge about how to improve the situation or the resources (time, money) to attend a training course to improve the situation. As such, most staff are not formally trained or qualified.

Skill training is needed to help current informal employees at restaurants and cafe to increase productivity and income, however, as staffing in small restaurants and cafes is mostly limited there could be challenges in staff finding the time to attend lengthy training courses. In addition, a two-tiered approach of management and staff training will be required for broader success.

5. Training Needs Analysis

5.1 Quick scan of the TVET environment and characterization of TVET servicing the selected occupations

Vietnam's system of technical and vocational education and training (TVET) is characterized by a diversified and currently not well integrated structure with responsibility across a number of government agencies. TVET is regulated by the Ministry of Labour, Invalids and Social Affairs (MoLISA), primarily by the General Department of Vocational Training (GDVT), as well as by the Ministry of Education and Training (MoET). Peoples Committees are responsible for TVET regulation at a provincial level.

In 1998, the TVET management responsibility was transferred to MOLISA (GDVT). MOET is responsible for higher technical education but still manages professional secondary education. By law, universities and colleges can also train lower levels which also makes the structure more complicated.

What may be considered "formal" TVET includes programmes at elementary level, secondary level and diploma level vocational training regulated by MoLISA. With the 2006 Law, the three-tier qualification structure was introduced in the MoLISA/GDVT administered TVET system. The vocational elementary level training is provided in vocational training centers, the vocational secondary level training is provided in secondary vocational schools and the vocational diploma level in vocational colleges.

In parallel to the MoLISA/GDVT system, there are also professional secondary schools and technical and vocational programmes at secondary level provided in colleges and universities under MoET. The table below summarises the responsibilities.

MOET (Educational)	MOLISA (Vocational)
Higher education	
College	Vocational college(1.5 - 2 years)
Professional secondary school	Secondary vocational school (2.5 - 3 years)
	Elementary vocational level (below 1 year) Count for 80% in all TVET of MOLISA
20% is private TVET	30% is private TVET

In 2010, GDVT was responsible for 123 vocational colleges, 301 secondary vocational schools and over 760 vocational training centers. The Vietnamese TVET environment includes more than 1,000 other providers (for example employment service offices) offering short term training courses. In addition, under MoET, 197 public universities and 30 private universities as well as 207 public professional secondary schools and 75 private secondary schools are also delivering TVET level programs.

Formal apprenticeship training also exists legally but is rarely implemented in practise. Another important mode of training is informal training, mainly on the job training, which to date is not formally recognized.

While access to training is constantly improving, equity of access remains an issue with the likelihood of getting access to TVET significantly lower for rural youth, ethnic minorities, unregistered migrants and people with disabilities.

By ownership type, there are three forms of vocational training centers, secondary schools and vocational colleges:

- Public vocational training centers, secondary schools and vocational colleges established by the State
- Private vocational training centers, secondary schools and vocational colleges established by organizations or individuals.
- Foreign-invested vocational training centers, secondary schools and vocational colleges established as joint-ventures or 100% foreign-owned.

5.1.1 Tourism TVET Providers

Vietnam currently has an estimated 284 establishments involved in tourism training, including 62 universities, 80 colleges (including 8 vocational colleges), 117 secondary training schools (including 12 secondary vocational), 2 training companies and 23 vocational training centers.

The Ministry of Culture, Sports and Tourism is directly responsible for eight tourism training institutions including two tourism colleges in Ha Noi and Da Nang, three tourism vocational colleges in Hai Phong, Hue and Vung Tau and three tourism vocational schools in Nha Trang, Da Lat and Can Tho. The subjects covered in tourism vocational training at both the secondary and diploma level are detailed below.

Tourism Vocational Training Subjects

Secondary level of vocational training	Diploma level of vocational training
Tour guiding	Tour guiding
Travel management	Travel management
MICE tourism management	MICE tourism management
Management of entertainment, sports services	Management of entertainment, sports services
Tour operations	Tour operations
Tour reservation services	Tour reservation services
Travel agency	Travel agency
Front office service	Front Office Management
Housekeeping service	Housekeeping Management
Food and beverage service	Restaurant Management
Food production	Food production

Bartender service	Bartender service
Pastry and bakery	Pastry and bakery
Hotel management	Hotel management
Resort management	Resort management
Hotel security	Hotel security

5.1.2 Tourism TVET provider's registration and quality assurance

Accreditation and registration

The heads of MoLISA/GDVT determine the procedures to manage the activities of vocational training centers, secondary schools and vocational colleges including setting up, merging, separating and dissolving.

In addition, the Ministry of Planning and Investment is in charge of business registration, including tourism training providers based on the Business Law of 2005 and Decree 43/2010/ND-CP on business registration.

Quality assurance

At a national level, MoLISA/GDVT are responsible for quality assurance in vocational training. Quality accreditation for vocational training includes the following:

- Objectives and duties
- Management and controls
- Teaching and learning activities
- Teaching and management staff
- Curriculum and syllabus
- Libraries
- Physical conditions including training equipment and teaching aids
- Financial management
- Services for trainees

The head of MoLISA/GDVT determine the standards and procedures for quality accreditation and supervise and implement quality accreditation for vocational training.

Within the tourism sector, the Vietnam Tourism Certification Board (VTCB), is currently responsible for the assessment and certification of tourism workers under the Vietnam Tourism Occupational Skills Standards (VTOS) system.

Curriculum formulation

In 2003, the Minister of Labour, Invalids and Social Affairs (MoLISA) issued the *Principles of Development and Organization of Vocational Training* (Decision No. 212/2003/QĐ-BLĐTBXH, dated 27/02/2003) where the principles for long-term and short-term training programs are described.

The principles that are defined for the development of curriculum include:

- The curriculum must prescribe knowledge and skills students should gain after studying subjects, consistent with the time defined in the training plan of each occupation. the training of the school.
- The curriculum must be basic, modern, relevant and practical. The content of the curriculum consists of two parts: the basic and specific sections. The basic provides the knowledge and skills for vocational training generally. The specific provides knowledge and specialized skills needed to suit the characteristics and specific requirements of the sector. The specific section should not be larger than 30% of the knowledge of the subject.

The Law of TVET states that any curriculum must be developed from standards. For tourism, the Standards must be developed by the Ministry of Culture, Sport and Tourism and approved by MoLISA. To date, there is still a lack of formal tourism skill standards as while eight have been developed, they have not formally been approved.

The framework curriculum stipulated by MoLISA covers 30% with the other 70% determined by the TVET institution. With tourism training, in practice many institutions use different curricula than approved by MoLISA as they believe that what is included in the curriculum is not relevant or practical.

5.1.3 TVET policies and strategies on human resources in the tourism sector

On 19 April 2011, the Prime Minister endorsed the Strategy for Vietnam human resources development to 2020.

In the tourism sector, the Ministry of Culture, Sports and Tourism (MCST) is currently drafting two important documents, the Strategy and Master Plan for human resources development in the fields of Culture, Sports and Tourism to 2020, vision to 2030. The issue of human resources development is also included as a strategic priority in the draft Strategy for Tourism development to 2020, vision to 2030. This is because, until now, there is currently no unified policy for tourism and hospitality to guide the development of education, vocational training and certification. There is also no clear philosophy or goals which specifically position the quality of trained staff as a central element in the competitiveness of Vietnam as an international tourism destination. This is in contrast to the growing trend among other nations to develop bespoke human resource development strategies for the tourism sector, within which the training and qualifications framework for both the educational sector and the workplace are key components.

The draft Strategy for Tourism Development to 2020, vision to 2030 has the aim that by 2015 more than 90,000 tourism workers have college, university or higher degrees and 60% of managers and supervisors working in tourism enterprises have specialized training in tourism.

MoLISA/GDVT has also identified tourism as one of priority sectors together with sectors such as aviation, marine and high technology. There is a preliminary plan to develop some 40 high quality tourism colleges and tourism training for 12 occupations matching international standards. Tentatively, by 2015, Hue Tourism Vocational College will be upgraded with an aim for training for three - five tourism occupations to be developed to meet the international standards. Three other tourism vocation colleges in Hai Phong, Da Nang and Vung Tau are also on a tentative list of training establishments to be upgraded to meet regional standards.

5.1.4 TVET Providers in Pilot Destinations

Hanoi

Hanoi as the political, socio-cultural and tourism center of the country has the biggest and most complicated network of TVET providers. Under MoET there are 14 universities registered to have tourism faculties and ten colleges have tourism training. The Hanoi Tourism College (regulated by MoCST) is the most significant and also the biggest VTCB evaluation center. Some 15 secondary schools having tourism vocational training.

Under DoLISA there are eight vocational training schools, nine vocational training centers and private schools and 10 other training establishments under different institutions. REACH is an informal provider of food and beverage training in Hanoi.

Lao Cai

Lao Cai is located at the northern highland area and has far more limited access to training opportunities. Formal TVET in Lao Cai includes the Hoa Sua Tourism Economics High School, Lao Cai Community College (Economic Faculty), Lao Cai Center for Job Training & Orientation and Lao Cai School for Culture, Arts & Tourism Vocational Training. These are regulated by DoLISA. The Lao Cai School for Culture, Arts & Tourism Vocational Training is also regulated by Lao Cai DCST. The school is also one of the centers of VTCB evaluation.

The informal TVET in Lao Cai include Sapa O'Chau, a private establishment that trains H'Mong youth in Vietnamese, English and tour guiding and baguette & Chocolate, a private social business of Hoa Sua Tourism Economics High School. The ILO will also be conducting informal training in and around Sapa as part of a Child Labour project.

Thua Thien Hue

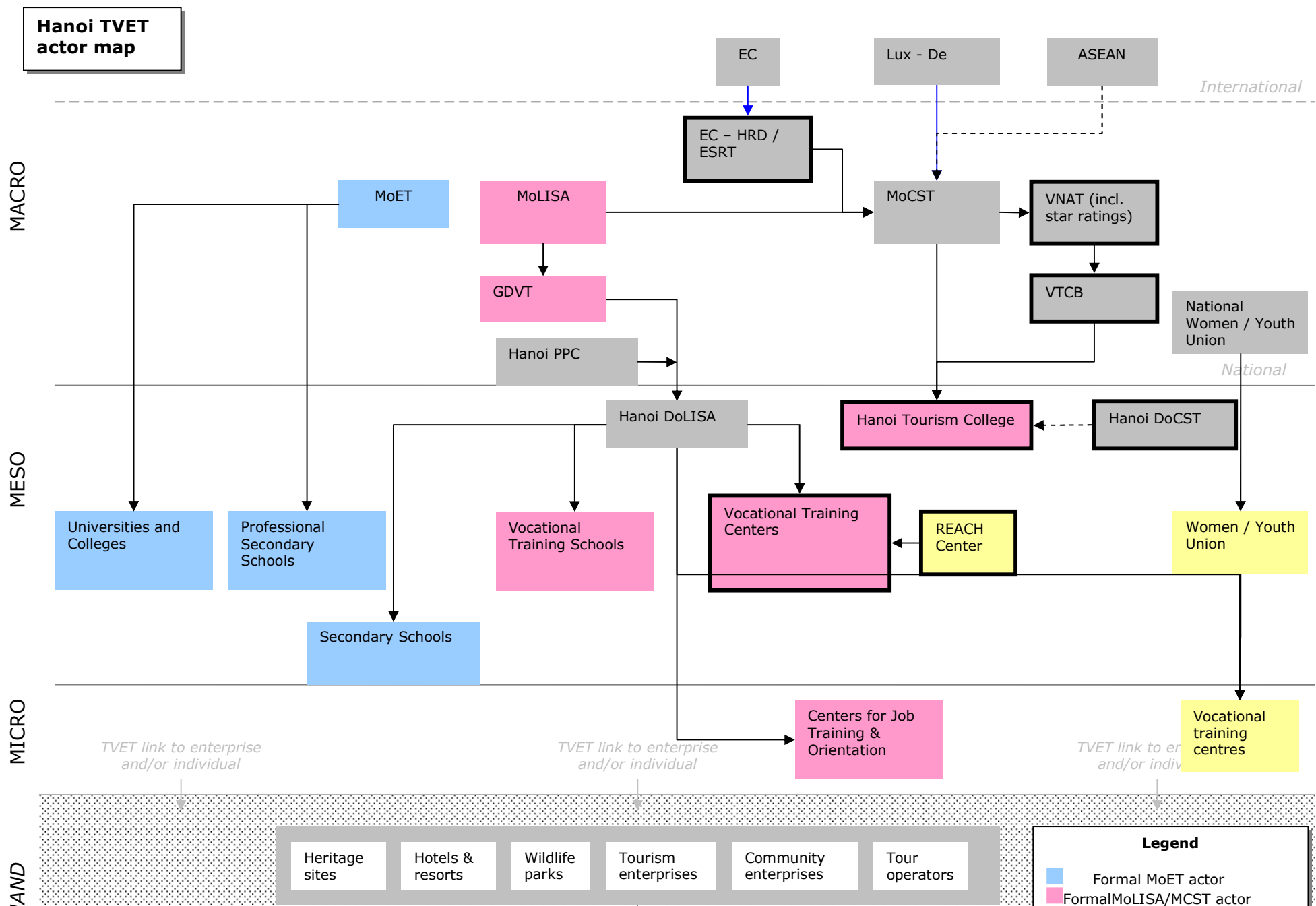
Hue is one of the most important tourism centers in Vietnam. Under MoET is the Faculty of Hospitality and Tourism at Hue University as well as Duy Tan Economics and Tourism Secondary School. Under DoLISA are the Au Lac Vocational Training School and Vocational Training Schools in Hue. Hue Tourism College is the biggest TVET in Hue regulated by MoCST, funded by LuxDevelopment. It is also one of the centers for VTCB evaluation.

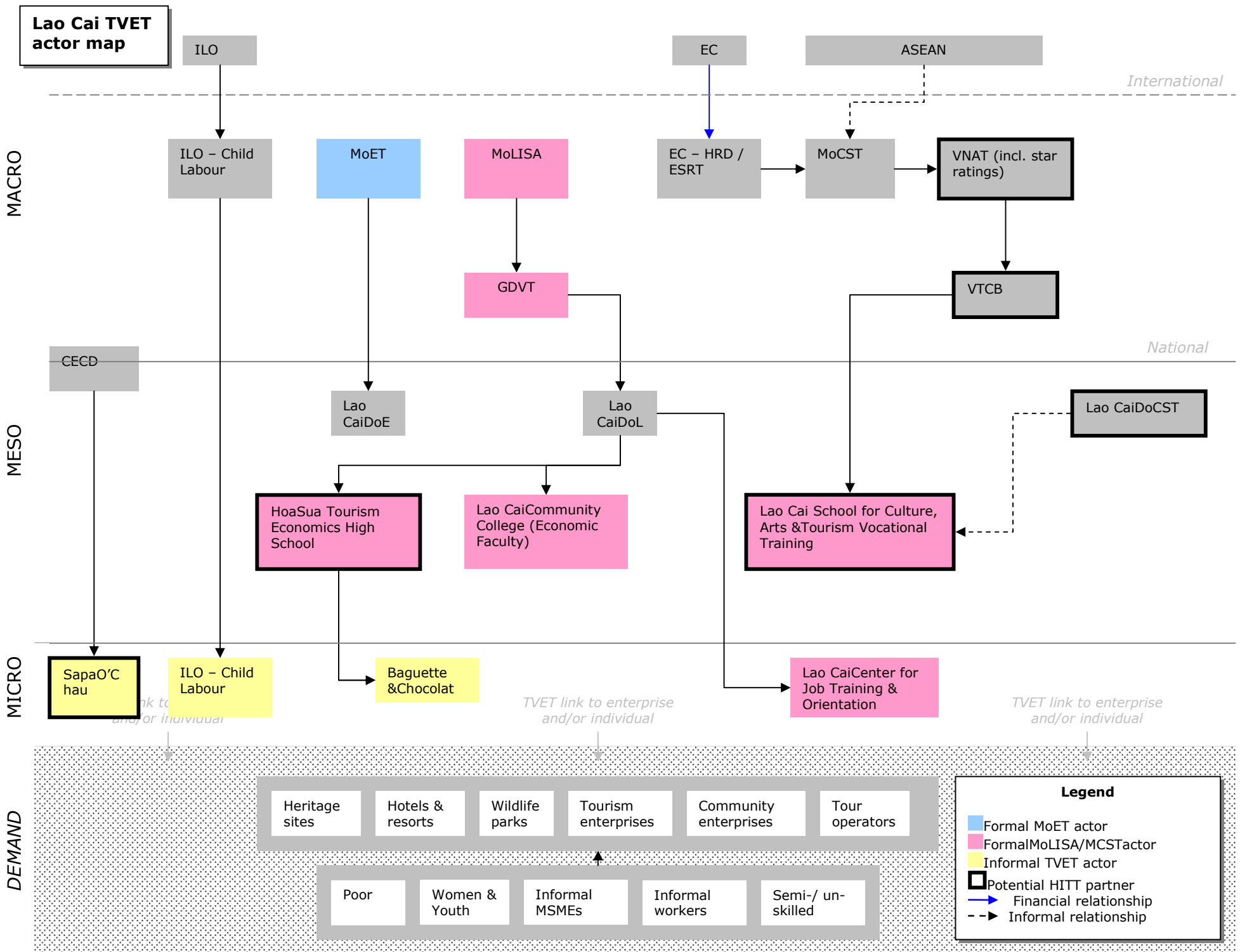
REACH, in cooperation with the Vocational Training School in Hue, provides training in food and beverage service and housekeeping.

Quang Nam

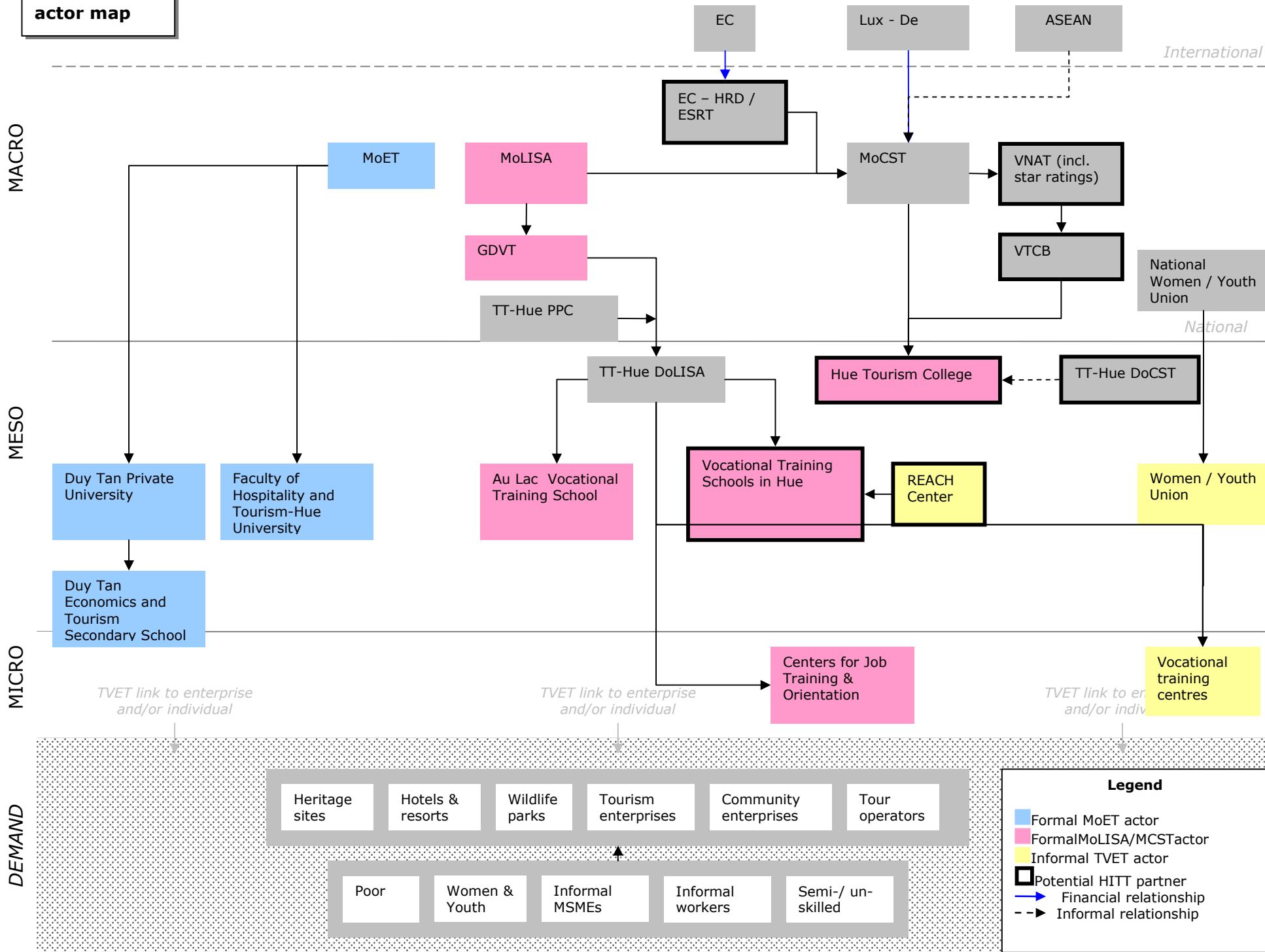
In Quang Nam there are two private universities teaching tourism under the MoET. Students can also access the Danang Tourism college in the neighboring province which is regulated by MoCST and is also one of the centers of VTCB evaluation. Quang Nam DoLISA regulates the Vocational Training Secondary Schools in Tam Ky and Hoi An.

Informal tourism training in Quang Nam includes REACH, STREET International (that has a working restaurant, Centers for Job Training & Orientation).

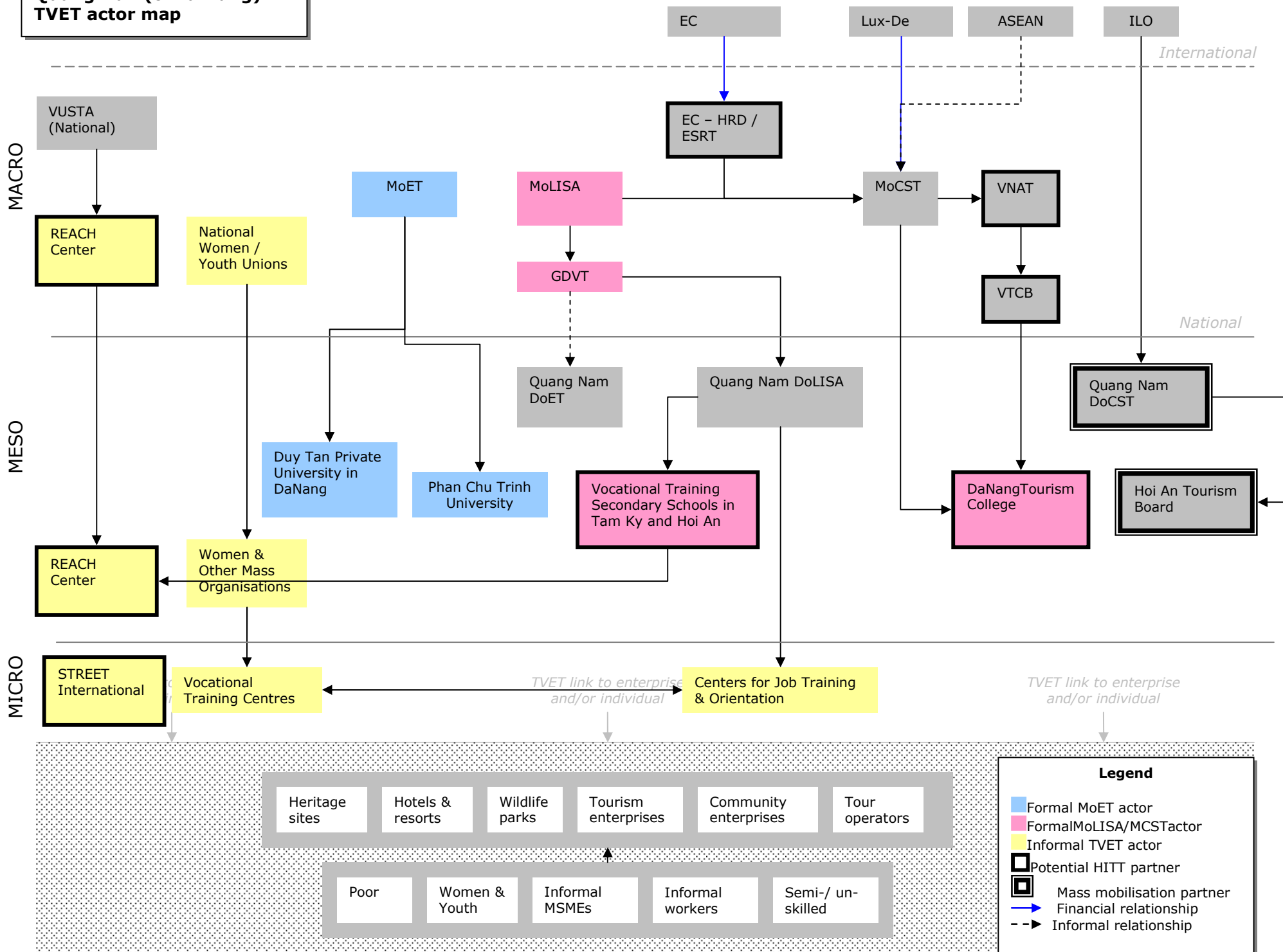




Hue TVET actor map



Quang Nam(& Da Nang) TVET actor map



5.1.5 International tourism training projects

Lux-Development Projects

The Government of Luxembourg (GoL) has provided support to the Government of Vietnam (GoV) in their efforts to upgrade the human resource capacity of the tourism sector in Vietnam, in the form of the "Hotel Training in Vietnam" Project. This important project was launched in 1996 with three objectives:

1. Upgrading and new construction of facilities, supply of equipment and teaching and learning tools for four tourism schools (currently renamed to Hanoi Tourism College, Hue Tourism Vocational College Hue, Vung Tau Tourism Vocational School and Saigon School of Hotel and Tourism);
2. Development of a national tourism curriculum: Since 1998, the curriculum set of 5 books including (i) Food and Beverage Service Skills, (ii) Professional Cookery Skills, (iii) Front Office Operations, (iv) Housekeeping Operations and (v) Hospitality Skills has been developed through a process of research and consultation guided by international consultants in collaboration with teachers and industry experts in Vietnam. The national curriculum was first introduced to the tourism schools in 2000 and received final approval from the Government authorities in the first quarter of 2004.
3. Training of teachers and students of four training institutions schools mentioned above as well as officials and business people.

Following on from the initial project, the GoL is now funding a Project VIE/031 "Strengthening of Human Resources in the Hospitality and Tourism Industry in Vietnam" being implemented by the Training Department of the MCST and Luxembourg Development Agency. This Project has a total budget of EUR 3,384,000 (EUR 2,950,000 from the GoL) and will finish by the end of 2012.

The overall objective of this project is to supply the hospitality and tourism industry in key tourist zones identified by the GoV with qualified personnel.

The specific objective is to increase quantity and improve quality of graduates from selected tourism schools/colleges in key tourist zones through upgraded capacities of schools to deliver practice oriented and demand-driven training by:

- Further strengthen capacity building aiming to produce uniform quality of human resources at an internationally competitive quality level
- The expansion and upgrading of practical training facilities needed to continue to make tourism training responsive to industry needs and to generate a revenue-stream which is critical to the long-term sustainability of tourism training providers;
- Strategic interventions in (i) Hue (expansion of the practical training hotel Villa Hue), (ii) HCMC (development of a training restaurant and demonstration kitchen), Hanoi and Vung Tau (demonstration kitchen) and (iii) in Da Nang (practical training equipment and facilities to be used in the school)
- Capacity building programme for new and existing teaching personnel in the nine participating schools to equip them with the skills and knowledge to deliver quality

training and adequate academic standards in accordance with VTCB standards and appropriate to the needs of the hotel and tourism sector

- To provide directors and senior managers of tourism schools access to training and support services to equip them with the skills to develop, maintain and manage their institutions efficiently and effectively aspiring to international benchmarks;
- To launch a comprehensive English language training initiative, accessible to all school personnel -directors, senior managers and teachers as well as students to significantly upgrade the level of English language competency in the sector.

The current GoL tourism project is complementary to HITT but given that it involves formal tourism training exclusively there are not great opportunities to work together.

VTCB

A vital component of initial Project funded by the GoL was the installation of a national assessment, examination and certification system for the tourism sector, the Vietnam Tourism Certification Board (VTCB). The Vietnam Tourism Certification Board was established in 2003 and is the one and only official National Awarding Body of the tourism sector in Vietnam, with aim of providing a valid quality system of assessment and certification of the skill competence of its employees.

The VTCB has three major functions:

- To determine training priorities and develop curriculum for the hotel industry through research and other means. With the approval of VNAT, MOET, and MOLISA, the VTCB will approve the programmes eligible for national certification.
- To accredit the training institutions that are eligible to use the VTCB's curriculum leading to the award of the VTCB's national certificates.
- To award national certificates to students and industry personnel who have met the criteria set out by the VTCB.

To ensure the sustainability of VTCB and consequently the national assessment and certification system for VTOS standards as well as the implementation of the Mutual Recognition Arrangement under ASEAN framework (MRA) for tourism professionals, which will introduce ASEAN common professional standards and training curriculum, the MCST has approved VNAT's proposal to submit to the Prime Minister for the inclusion of VTCB into VNAT's organizational structure.

HRDT Project / VTOS/ ESRT Programme

The **HRDT Project** originates from a study in 1997 commissioned by the EU in which it was concluded that the hotel and tourism schools could not provide a sufficient trained and qualified personnel to keep pace with tourism growth. Hence, a complementary system was recommended in which operational employees in the tourism and travel sectors would receive on-the-job training in technical (occupational) skills by their supervisors, who in turn were trained in training skills.

The overall objective of the project is to "upgrade the standard and quality of human resources in the tourism industry in Vietnam and to enable the Government and industry to sustain the training quality and quantity at the project's completion". More specifically, the

project's purpose is "to enhance and recognize the services of entry level workers in the tourism sector". With a total budget of EUR 12 million (EUR 10.8 million funded by the EU) this Project was completed in January, 2010.

This Project had 6 components: (i) Institutional Strengthening; (ii) Standards and Certification; (iii) National Trainer Development Programme; (iv) Regional Accreditation; (v) Regional Cooperation; (vi) Tourism Management Programme.

VTOS, which stands for "Vietnam Tourism Occupational Skills Standard system of Vietnam", comprises international Skill Standards, adapted locally to Vietnam's hospitality and travel industry, for 13 occupations at entry level, originally developed by the Human Resources Development in Tourism (HRDT) Project. The 13 skill standards covering hospitality and tours/travel are detailed below.

VTOS Standards

Hospitality	Tour/Travel
<ul style="list-style-type: none"> • Housekeeping • Front Office • Food & Beverage Service • Food Preparation-Western • Food Preparation-Vietnamese • CRS/New Technology-Hotels • Pastry/Bakery • Hotel Security • Small Hotel Management 	<ul style="list-style-type: none"> • Travel Operations • Tour Operations • Tour Guiding • CRS/New Technology-Travel

In addition to developing 13 standards, a pool of 3,200 Trainers were trained. Training of Trainers courses were conducted under the name of Trainer Development Programme (TDP) and contained an introduction to VTOS Standards, training in training skills, assessment of technical skills and testing of training.

VTCTB has the responsibility to register, monitor, assess trainees in Assessment Centres, located at 14 hotel and tourism schools and colleges throughout the country as well as Appraisal Centres located at hotels and tourism companies nation-wide

ESRT Programme

The Environmentally and Socially Responsible Tourism Capacity Development (ESRT) Programme has a duration of five years until November 2015. The total programme budget is EUR 12.1 million (EUR 11 million funded by the EU).

The overall objective of the ESRT Programme is to mainstream responsible tourism principles into Vietnam's tourism sector to enhance competitiveness and contributing to achieving the Socio-Economic Development Plan.

The programme has 3 result areas:

1. Policy Support and Institutional Strengthening
2. Product Competitiveness and Public-Private Partnerships
3. Vocational Education and Training in the Tourism Sector

In the third result area, there will be some activities related to training of tourism workers in poor and remote areas based on revised and newly developed VTOS standards. The newly developed VTOS standards at an entry level are:

- On site guide
- Homestay operation
- Drivers communicational skill
- Customer care skill

It will be essential for HITT to work closely with the ESRT Programme as there are potential strong synergies but also a risk of duplicating effort particularly in developing training material for on-site guides and homestay operations.

ASEAN Tourism Standards

In 2007, ASEAN received the technical assistance from AUSAID to develop the ASEAN Common Competency Standards for Tourism Professionals (ACCSTP) and the Common ASEAN Tourism Curriculum (CATC).

The ASEAN Common Competency Standards for Tourism Professional (ACCSTP) are arranged as sets of competencies required by qualified professionals who seek to work in the various divisions of labour that are common across various sectors of tourism in ASEAN Member Countries. Compliance with these “minimal” competencies will be an essential reference or benchmark for anyone wishing to apply for a position in another ASEAN member state. Work has been done on developing the specific competency standards in 32 jobs titles with 242 competency units.

A Mutual Recognition Arrangement (MRA) in Tourism is proposed among ASEAN member countries designed to facilitate the freer movement and employment of qualified and certified personnel between ASEAN member countries. Vietnam is in more advanced position compared to other ASEAN member States in implementing the MRA due to the experiences gained from the implementation and application of VTOS system.

ASEAN has developed standards for Home-stays which will be utilised by HITT.

5.2 Challenges in the provision of TVET for the target population

Although training needs for tourism informal workers have been identified, there are challenges for providing tourism vocational training for the target group in Vietnam. Key challenges are detailed below.

Mobilisation of Trainees

Informal tourism workers are often not managed by local tourism authorities or a formal organisation, hence it is difficult to mobilise these workers to participate in a skills training program. The self-employed worker category of informal worker such as local transport

service providers and vendors are often mobile, therefore it is more difficult to attract this group to participate in training. It is also harder to monitor the impact of training.

Mobilising women to participate in training may be a challenge as they sometimes find it hard to leave domestic duties. The situation is easier for youth, unskilled or semi skilled workers, however, agreement is needed from employers and/or support from local authorities or local association to help mobilise trainees.

Developing linkages with Tourism Businesses

SNV Vietnam actively engages with the private sector especially through associations such as the Responsible Travel Club in Hanoi and Responsible Travel Group. Tour company members of these associations are eager to participate in the training of trainer course and then conduct training course for target informal workers group. They may also be able to employ a limited number of trainees.

Besides time, it is a challenge to mobilise contribution from local tourism enterprises for implementing HITT as they tend to be small scale with limited human and financial resources. The smaller companies are not in need of large numbers of trained staff so it is difficult to establish a meaningful partnership at an individual enterprise level. To be effective the partnership needs to be with local tourism authorities and/or industry associations. Most industry associations are weak in Vietnam however they can be helpful in communicating to businesses.

Larger enterprises such as 3-5 star hotels or large tour companies require more workers but tend to recruit workers that have formal tourism qualifications. It would be difficult for these businesses to employ workers with short term training as the standards would not be high enough.

Linking to Job Entry

Tourist enterprises that were interviewed as part of this study agreed that it is essential to strengthen the capacity for informal tourism worker to improve their performance to help them increase their production, income and employment opportunities. However, it is a challenge to link HITT trainees to jobs as there is currently strong competition for jobs with graduates of formal tourism colleges/schools. Another difficulty is that there is no budget to fund job placement support that is often necessary to help trainees from disadvantaged backgrounds enter the workforce.

A potential solution is to provide HITT training as new emerging destination where there is strong gap between labour demand and TVET provision opportunities, such as the North West.

Self Evaluation for Tracking Changes

It is essential to have in place self-monitoring and evaluation systems for tracking post-training trainee performance and quality improvement of curricula. However, the system must be simple and practical. The project team will need the cooperation of the target group, however informal workers often do not have skills in recording changes and may also not have the motivation to undertake this task. A key will be to ensure that monitoring is practical, simple and regular.

Fulfilling Market Trend and Needs

There is growing market demand for high quality tourism products and services and suitably qualified labour. A training program should deliver high quality training including appropriate training curriculum, training materials, training environment and trainers. However, a high quality training course that has enough time for both theory and practice with adequate training materials such as audio and visual equipment is very expensive. Given the very limited budget of HITT for conducting training and a very high target, it is a challenge to provide high quality training and produce qualified trainees that meets the demands of the market.

5.3 Solutions to gaps identified in the provision of practical and market oriented TVET in the occupations selected

In order to bridge the gaps that have been identified in the provision of practical and market oriented TVET as well as address the challenges that have been identified, practical training approaches have been developed for the four selected occupations.

Homestay Operations Skills

In Vietnam there is not formal training curriculum available for homestay operations nor homestay operation training provided by current TVET providers. HITT will develop homestay operation standards, based on draft ASEAN standards, and a practical training curriculum for homestay operations. Training will be conducted for both existing homestay operators in Sapa, Hoi An and Hue and for new entrants in emerging destinations of Lao Cai and Ha Giang Provinces.

Local tour guiding skills

There are VTOS standards available for tour guiding, however this is aimed at formal guides. There is no standards or training curriculums for local guides. HITT will develop local guide standards and a practical training curriculum for tour guiding. Target groups for local tour guides are existing local tour guides in Sapa and informal workers such as boatmen, cyclo drivers in Hue and Hoi An and new local guides in Lao Cai and Ha Giang Provinces. Basic skills of local tour guiding will also be provided to students of REACH.

Food and Beverage Serving Skills

There is currently both VTOS standards and practical training curriculum for food & B serving skills (for entry level), that was developed by VNAT and Lux Development. HITT Program section in Vietnam can use this curriculum and adapted for training new entrants in emerging destinations in Northwest region. HITT program will support REACH to align VTOS standard for F & B serving skills into their current training programs.

House Keeping Skills

There is currently both VTOS standards and practical training curriculum for House Keeping Skills (for entry level), that was developed by VNAT and Lux Development. HITT Program section in Vietnam can use this curriculum and adapted for training new entrants in emerging destinations in Northwest region. HITT program will support REACH to align VTOS standard for F & B serving skills into their current training programs.

In general there are a range of activities and strategies that need to be implemented to make sure the challenges identified above are effectively addressed. These include:

- Developing a network of qualified trainers in selected destinations to be able to provide skills training and follow up coaching for targeted groups.
- Identify criteria of trainees and beneficiaries and recruit trainees for the program based on agreed criteria.
- It is essential to develop working relationships with local government, local tourism authorities and professional associations at both meso and macro levels to help in recruiting trainees.
- Methodology of training should be practical and appropriate with level of education of informal tourism workers.
- Course duration and logistical arrangement should be flexible enough to suit their working and personal conditions of the informal tourism workers.
- Given the very limited budget for training compared to target number of trainees, it is essential to obtain support from stakeholders and align with other tourism training programs and initiatives including REACH and ESRT to meet targeted number of beneficiaries and impact on income and employment.

6.0 Conclusion Inception Phase

6.1. Conclusions related to tourism situation analysis and expected demand for low-skilled youth and women labour

Both domestic and international tourism in Vietnam is growing strongly, although it is the major tourism hubs such as Ho Chi Minh City and Hanoi as well as the coastal zone that attracts the most visitors. While tourism is also growing in the more remote mountainous areas of Northern and Central Vietnam, it is coming off a low base and access is still an issue along with the need to improve basic services such as accommodation and to broaden the range of products.

Overall there is strong demand throughout the country for labour from hotels and restaurants, much of this is informal, as smaller tourism enterprises tend to avoid formal agreements with staff. Tourism is also helping to generate micro enterprises such as food stalls and self-account workers especially in transport (cyclo, xe om and boats).

Women and youth are heavily involved in tourism with no significant barriers to entry, especially sub-sectors such as hotels and cafes and restaurants. The most disadvantaged groups in the country, ethnic minorities, tend to find it harder to enter formal tourism businesses. They are engaged in home stay operations and tour guiding where they are often seen as the “attraction”.

The strong growth in tourism throughout Vietnam means that there is a need for tourism training targeting the informal economy. The challenge is to identify the gaps where HITT can add value to the exiting tourism training options.

6.2. Conclusions related to the Training Needs Analysis and constraints for TVET towards selected target groups

The training needs for the informal tourism workers have been identified based on results of value chain analysis, market analysis, job analysis and assessment of current TVET providers.

Most informal tourism workers are unskilled or semi-skilled. Informal workers have not typically participated in any formal vocational training course and skills are developed by instinct or on the job training by their employer.

Vietnam, unlike some of the countries that are involved in HITT has a significantly developed tourism TVET system. However TVET providers do not have training programs targeting informal tourism workers with the exception of informal vocational training institutions of NGOs such as REACH or informal training courses for community tourism sites that have been funding by NGOs such as SNV.

The selected occupations for HITT in Vietnam are homestay operations, local tour guiding, food and beverage serving and room attendants (house-keeping) These occupations have been selected based on the high demand of the market, high participation of women, youth and the disadvantaged (particularly ethnic minorities) and have not yet received enough attention from both formal and informal TVET providers.

Short training courses will be provided for existing informal workers and longer training (two-three months) will be given for new entrants that focus on youth and women. For HITT to be successful, it will be important to have sound strategies for mobilizing trainees and linking trainees to employment opportunities, having effective monitoring and tracking of impacts and coming up with innovative solutions to overcome the limited resources available.

6.3. Recommendations for TVET curriculum development and HITT implementation phase

6.3.1 Training Approach

The following training strategies have been identified for the selected occupations detailed earlier in the report.

Training of Trainers

The trainers that will provide training to final beneficiaries will be selected from training centres of REACH and TVET providers in pilot geographical areas e.g Hanoi & Hue Tourism Colleges, Lao Cai Secondary School for Arts and Tourism, Sapa Ochau, and the private sector. Due to the characteristics of training for homestay operations and village based guide, trainers can also include existing homestay operators and/or staff of local tourism authorities.

Trainers will be trained on occupation standards, required competencies and training methodology for specific occupations. In order to balance program costs, the project team may consider to recruit existing Trainers for Food and Beverage Servings Skill and House

Keeping Skills whom were trained and accredited by VNAT through the EC funded Tourism Human resource Development Program. The Training of Trainers course is estimated to take from five to seven days depending on occupation. Trainers will be assessed at the end of training course by a panel of training consultants and REACH & SNV staff. Trainers will prepare a training plan and carry out training courses for final beneficiaries at tourism sites upon agreement with SNV and REACH.

It is anticipated that seven to ten trainers for each occupation will be trained with approximately 40 trainers in total.

Training the Target Groups

Depending on the destination and occupation, a mix of existing informal workers and new entrants will be mobilized. While all training will be at entry level, the duration of training for new entrants will take longer than for existing informal workers who already have practical experience. It is anticipated the duration of training for new entrants will take one to three months depending on the occupation while the training for existing workers will be around five to seven days.

6.3.2 Training Curriculum and Materials

Under the framework of the Human Resource Development Program for the Tourism Sector funded by the EU from 2005-2009, the National Tourism Authority of Vietnam developed the Vietnam Tourism Operational Standards (VTOS). Currently there are VTOS standards for 13 tourism occupations including Food and Beverage Service, House Keeping, Small Hotels and Tourist Guides which are applicable to the selected occupations for HITT Vietnam. The HITT program in Vietnam will make use the current VTOS standards where appropriate. However, since the VTOS standards are focused more on the formal sector, it will be essential to review and adapt the standards, curriculum and training approach.

In addition, as discussed above, the new EC program which will run from 2011 to 2015, Building Capacity for Environmental and Socially Responsible Tourism in Vietnam (ESRT) is planning to develop VTOS standards and associated curriculum for local guides (on-site guides), community and rural tourism enterprise operation skills, customer care skills, home-stay development including an operational manual on how to start homestays and minimum standards and guidelines for comfort, hygiene and safety. The ESRT program will also pilot training in selected geographic areas. These standards and training will be more applicable to training of the HITT target beneficiaries given the informal status.

Due to the strong potential overlap, there is a great opportunity for HITT to partner with ESRT to develop training curriculum and share costs for training for trainers and target beneficiaries and target group. However, because the ESRT program's duration is much longer than HITT, a partnership may delay the implementation of HITT. An approach which balances the need to begin developing curriculum and training material with the benefit of waiting to better align with the ESRT program is detailed below.

Given the requirement for in-country curriculum development, the budget for a consultant/s to assist this process needs to be increased

Approach to Developing Training Curriculum and Materials

Occupation	Relevant Standards, Training Material	2012 Approach	2013 Approach
Homestay Operator	ASEAN Standards (drafted) VTOS home-stay standards and associated material (under development)	Focus on existing operators with targeted training to improve income – use ASEAN draft standards where relevant and VTOS material if available to help design curriculum and training approach. Follow up with training of trainer workshops.	Begin also training new entrants based on VTOS standards
Local Guide	VTOS Tours Guiding VTOS On-Site Guide standards and associated material (under development) Laos village based guide training manual	Design curriculum and training approach based on Laos manual and VTOS material. Conduct training of trainer workshops. Add local guide course to REACH courses and also train informal guides eg Hue cyclo drivers, tourist boat skippers, guides in Sapa	Redesign curriculum and training approach to align with VTOS if needed. Begin training village hosts in conjunction with home-stay training.
Food and Beverage Server	VTOS Standards Existing REACH Curriculum and Approach	Imbed market based/VTOS approach within REACH's new curriculum. Training current REACH students.	Provide training to new entrants outside of REACH.
Room Attendant	VTOS Standards Existing REACH Curriculum and Approach	Use exiting curriculum	Provide training to new entrants

6.3.3 Assessment, Accreditation and Certification

Trainees will be assessed at the end of the training course. The assessment panel will include trainers, training institutions and local tourism authorities. Certificates for trainees who have passed the exam will be co-signed by the TVET institution in the region and local tourism authorities. For the onsite village based guide trainees who successfully complete the training, trainees can apply for a license for onsite guiding from provincial tourism authorities.

6.3.4 Training strategies for selected occupations

Occupation/Type of course	Target (people)		Training duration	Key contents	Location and number	Remarks
	2012	2013				
1. Homestay operator						
Training for existing home stay operators	100	100	4 days per course at field destinations including support to prepare interpretation/marketing material, with additional 2 days mentoring & follow up training in 2013	<ul style="list-style-type: none">- homestay operational standards- customer service- value add sales- low cost marketing- Assessment & certification- follow up mentoring support	<ul style="list-style-type: none">- Lao Cai Province: 70- Other North West 50- Hoi An: 50- Hue: 30	Potentially work with RTG tour operators in Hue
Training for new entrants		100	Two five day modules at field destinations with additional four day refresher course and mentoring support	<ul style="list-style-type: none">- homestay operational standards- entry level for homestay operating skills- Assessment & certification- follow up mentoring support	<ul style="list-style-type: none">- Lao Cai and Ha Giang- Other depending if partnerships are developed	Need partnership with ESRT program for funding support to meet target. Needs to be undertaken with Government and/or other partners to provide supporting services such as small infrastructure improvements and marketing.
2. Local guide						
Training for existing informal guides and	200	300	Five days per course at selected destinations,	<ul style="list-style-type: none">- On-site guide (village based	<ul style="list-style-type: none">- Lao Cai	<ul style="list-style-type: none">- -REACH students Hanoi,

for REACH students			with additional mentoring support	<ul style="list-style-type: none"> guide) operational standards - Basic guiding and communication skills for guide - Understanding the tourist - Understanding the destination - Assessment & certification - follow up mentoring support 	Province: 50 - Hoi An: 100 - Hanoi: 300 - Hue: 100	Hue, Hoi An - Lao Cai: H'Mong & other ethnic minority tour guides - Hoi An: local guide at Cham island and cyclo drivers/boat skippers - Hue: cyclo drivers/boat skippers
Training for new local guides		100	Two week per course at training centre of TVET providers in Lao Cai and North West provinces with additional mentoring support	<ul style="list-style-type: none"> - On-site guide (village based guide) operational standards - Entry level skills for guide, including essential soft skills - Assessment & certification - follow up mentoring support 	- Lao Cai, Ha Giang, Dien Bien and other provinces in the North West	<ul style="list-style-type: none"> - Need partnership with ESRT program for funding support to meet target - Work with organisations such as Sapa O'Chau
3.Food and Beverage Server						
Training for REACH students using market based approach	100	300	Three months per course at training centres of REACH	<ul style="list-style-type: none"> - F & B serving skills - Soft skills: communication, understanding of customers - Marketing skills - Assessment & 	- Hoi An: 150 - Hue: 150 - Hanoi: 100	

				certification		
Training for new entrants as F & B servers (focus on youth and women)		100	Three month training course by REACH or partners	<ul style="list-style-type: none"> - Entry level skills for F& B server including essential soft skills - Assessment & certification - follow up mentoring support 	<ul style="list-style-type: none"> - Lao Cai, Ha Giang and North West Provinces: 100 	Need partnership with ESRT program for funding support to meet target
4. Room Attendant						
Training for new entrants as room attendants(focus on youth and women)		100	One month training course at training centres of REACH or TVET partners in the region.	<ul style="list-style-type: none"> - Entry level skills for room attendant, including essential soft skills - Assessment & certification - follow up mentoring support 	<ul style="list-style-type: none"> - Lao Cai and North West Provinces: 100 - 	<p>Need partnership with ESRT program for funding support to meet target.</p> <p>Training for room attendants may not go ahead if support is not available as resources will be spread too thin.</p>

6.3.5 Program action plan for 2012 and 2013

The following key activities will be carried in the period of 2012 and 2013

	Activities	Outputs	Responsible	Time						Budget
				2012 Q 1	Q 2	Q 3	Q 4	2013 1- 6	6 - 1 2	
1.	Training curriculum development									
1.1	Recruit national consultant on tourism HRD to support	Qualified consultant recruited	SNV Country team	X						
1.2	Finalise operational standards required for selected occupations based on VTOS /ASEAN standards	Required operational skills/competences for four occupations: homestay operator; onsite village based guide; F&B servers and house keepers	Country team, REACH & National Consultant MDF for comments	X						
1.3	Review available training manuals of VTOS and other existing materials	Possible use or adaptation of good materials have been identified	Country team, REACH & National Consultant	X						
1.4	Develop training modules and contents for each selected occupation	Draft modules and contents of training curricula for homestay operator; onsite village based guide; F&B servers; room attendants and receptionist	Country team, REACH & National Consultant MDF for back stopping support	X	X					
1.5	HITT Roundtable workshop on inputs for training curriculum and training manuals	Inputs and comments to finalise training curriculum and training manuals	HITT Round Table VN Country team		X					
1.6	Finalise training curriculum and training manuals				X					
2.	Training of Trainers									
2.1	Recruiting trainers	Criteria for trainers Max 40 trainers are recruited	VN Country team & REACH		X					

2.2	<p>Train the trainers course</p> <p>Two courses combine</p> <ul style="list-style-type: none"> - Trainer course for Onsite Village Guide/ Homestay Operators - Trainer Course for F & B Serving Skill - Trainer Course for House Keeping <p>Method: shared teaching methodology session and separate sessions in operational skill standards and practice</p>	<p>40 trainers are trained</p> <p>At least 30 trainers are chosen for conducting training courses for final beneficiaries</p>	National Consultants to conduct training courses Country program team to support		X	X	X	X		
2.3	Assist trainers in preparing lesson plans for training target groups	Lesson plans area available	National Consultants SNV country program team			X	X	X		
3.Training the informal workers-final beneficiaries										
3.1	Mobilising trainees and develop a training plan & cooperation agreement for each tourist destination/province	List of participating destinations/businesses/ informal workers Cooperation agreements signed	VN country team			X	X			
3.2	Conducting training for final beneficiaries	Training course reports, highlight lesson learn Baseline data collected	Trainers of HITT prog. Country team				X	X	X	
3.3	Assessment and certification	List of certified trainees	TVET institution/Tourism Authority				X	X	X	
3.4	Follow up courses and mentoring support to trainees	Reports highlight results and areas for improvement	Trainers of HITT program Country team				X	X	X	
4.	Program administration and Monitoring & Evaluation									
4.	Discuss and	Cooperation in term	Country team	X						

1	agree on partnership with ERST for training curriculum; manual development & carrying out training courses	of cofounding activities								
4. 2	Discuss and agree on partnership with other potential donors or partners for possible funding, cooperation or upscale	ACID; ILO or Ministry of Tourism/General depart of vocational training	Country team			X			X	
4. 3	Collect baseline data for TVET providers and target groups/final beneficiaries	Baseline data in place	Trainers of HITT Country team			X	X	X	X	
4. 4	Conduct periodic HITT Round Table workshop for progress review and discuss related issues	Workshop reports with data on HITT progress and highlight key issues	HITT Round Table members and country team		X		X		X	
4. 5	Program mid term review	Review report highlighting achievements and areas for improvement	HITT Global-External consultant			X				
4. 7	Program final Review	Outcomes and impact assessment	HITT Global-External consultant						X	

Appendix 1: Revised Tools

TOOL 1 Quick scan of tourism sector at country level

This tool will allow you to systematically collect the most relevant information.

- Important to note is: Focus on national level + destination level
- State where the figures come from (mention source)
- Mention when the figures are estimates or not available
- Use graphs if you have these available
- In gathering data, keep a demand-driven approach in mind: only look for data that focuses on demand, growth, etc.

Level	Indicative questions and explanations	Mention source	Describe
1 What is the profile of the national tourism sector?			
Macro (latest data possible year)	<p>GDP per capita (latest year) + share of tourism in GDP</p> <p>Private tourism investments in US\$ (specify destinations)</p> <p>Poverty areas in country (indicate what regions are poorest)</p> <p><i>Structure of the tourism industry:</i></p> <p>Number of firms, segmented (hotels, restaurants etc.)</p> <p>Employment:</p> <p>Direct and indirect, full-time/part-time, seasonality analysis</p> <p>(Estimated) formal / informal jobs in tourism sector</p>	<p>UNWTO</p> <p>WTTC</p> <p>CoC</p>	
Policy and institutional framework	<p><i>Tourism legislation regulatory practices</i></p> <p>Public institutions (e.g. ministry, tourism boards)</p> <p>Business tourism associations, number of members</p> <p>Licensing (important – relate to employment in tourism sub-sectors)</p> <p>SME regulations, taxes and policies</p> <p>Business environment/ easy to set up a business?/ red-tape and procedures</p> <p>Tourism policy framework: national, regional, local + new policy reforms underway or being discussed (destination level)</p>	<p>UNWTO</p> <p>WTTC</p> <p>Ministry of Trade</p> <p>National Employment Agency</p>	
Supply	<p><i>Indicate tourist areas:</i></p> <p>Main tourist attractions, hotspots and circuits on national level + type of tourism (eco, cultural, urban tourism)</p> <p>Main tourist investment projects in pipeline (e.g. road construction)</p> <p>Growth trends in tourism (destination and in which types of tourism)</p>	Ministry of tourism	

2 What are the characteristics of tourism source markets?			
Demand	<i>Number of foreign / regional (e.g. Asia) / domestic tourists:</i> Nationalities Seasonal and growth trends Average length of stay Average daily expenditure in US\$ Segments: <i>Write down notable characteristics of segments + give examples</i>	<i>Ministry of tourism</i>	
3. Future prospects for tourism development?		<i>Ministry of tourism</i>	
Major areas of growth for segments	Revenue, growth potential (spending per day x length of stay)		
	Spillovers to the rest of the economy (e.g. linkages, competitive pressure on domestic players, etc.) and reduction of leakages,		

Tool 2: In-depth Interview Guide Informal Sector

Instructions: Please aim for at least a 50% representation of female respondents and ensure youth (16-25 years) represent a significant proportion of the total.

Also ensure ethnic minorities are included (in particular in the North West). Encourage respondents to speak freely and openly and report on any additional side issues that might not be included in the questionnaire but are relevant. Please write clearly and provide as full a response as possible.

I am conducting a short survey on behalf of SNV Netherlands Development organization and REACH for a project funded by the European Commission, looking at the tourism sector. The survey will only take a few minutes and all results will be kept confidential.

Screening Question

Firstly, which of the following best describes yourself:

- ☐ A small businesses owner with less than ten staff (**go to Section A**)
- ☐ Self employed or own account worker (**go to Section B**)
- ☐ A dependent worker defined as working but having no social insurance protection (**go to Section C**)
- ☐ None of the above (**finish interview and thank respondent**)

SECTION A - MICRO ENTERPRISES

1. Which of the these categories best describes your business

- ☐ restaurant/café/bar
- ☐ hotel/guest house/home stay
- ☐ souvenir store
- ☐ handicraft shop
- ☐ other (please state) _____

2. What products and services do you offer?

3. Who are your main customers? (prompt for origin and demographics)

4. What are your business objectives? What would help you to reach them?

5. What are the biggest challenges/issues that you face?

6. How many staff work in your business and what is their profile (use matrix below – informal worker is defined as having no social insurance protection)

Staff Member	Formal or Informal (F/I)	Full time or part time (F/P)	Family member (Y/N)	Managerial (Y/)	Male or Female (M/F)	Age (<15=A, <25=B)	Ethnic minority (Y/N)	Monthly income (VND)
--------------	--------------------------	------------------------------	---------------------	-----------------	----------------------	--------------------	-----------------------	----------------------

1								
2								
3								
4								
5								
6								
7								
8								
9								

7. What were your staff typically doing before they worked for you?

8. How do you recruit staff? What skills are required when you recruit staff? Is it easy to find workers whom full fill the required skills?

9. What is the size of your business? (**must** obtain sales/revenue, **try** to also obtain profit if possible)

a. Sales/Revenue (VND/month – average)

b. Profit (VND/month)

10. Who owns the assets of your business including property and equipment?

11. Have you considered expanding into any other businesses? Did a lack of skilled staff influence your decision making in expanding businesses? Why?

12. What qualifications, if any, do you and your staff have?

13. What training, if any, have you and your staff received? Name of organisers?

Training service providers(prompt for both formal and informal training including on the job)

14. What type of training would you like to receive for yourself and/or for your staff?

(prompt for subject, location, language, timing and length etc)

15. What are the challenges you face in training staff?

16. Do women, youth and ethnic minorities face particular challenges working in your business or a business like yours? (prompt for the three categories)

17. Have you got any other comments that you would like to make?

18. To finish can we get a few broad details about yourself?

- a. Age _____
- b. Male / Female (do not ask)
- c. Ethnicity _____

Thank you very much for your time.

SECTION B – OWN ACCOUNT WORKERS

1. Which of the these categories best describes your job

- ☐ food vendor
- ☐ handicraft vendor
- ☐ tour guide
- ☐ cyclo driver
- ☐ other (please state) _____

2. What specific products and services do you offer?

3. What hours do you work? (prompt for part time/full time or seasonal)

4. How long have you done this job?

5. What is your monthly income? (VND average month)

6. Who are your main customers? (prompt for origin and demographics)

7. Why are you working in this job?

8. What problems do you face in your work? What is needed to overcome this problem?

	Problem	How it is overcome
1		
2		
3		
4		
5		

--	--	--

9. How would you describe your working conditions (prompt for positives, negative and overall)

10. What qualifications (if any) do you have?

11. What training (if any) have you had?

12. What kind of training, if any, do you need for your current job?

13. What would you like to do in the future?

14. What training would you need to reach this goal? (Prompt for content, location, language, length and timing)

15. Have you got any other comments that you would like to make?

16.To finish can we get a few broad details about yourself?

- a. Age_____
- b. Male/female (do not ask)
- c. Ethnicity_____

Thank you very much for your time.

SECTION C – DEPENDENT WORKERS

1. Which of the these categories best describes the business you work in:

- ☐ restaurant/café/bar
- ☐ hotel/guest house/home stay
- ☐ souvenir store
- ☐ handicraft shop
- ☐ tour operator
- ☐ other (please state) _____

2. How long have you worked in this business?

3. Is this a full time job or it is part time or seasonal?

4. Why are you working in this job?

5. What problems do you face in your work? What is needed to overcome this problem?

	Problem	How it is overcome
1		

2		
3		
4		
5		

6. How would you describe your working conditions (prompt for positives, negative and overall)

7. What is your monthly income? (VND average month)

8. Besides monthly salary, are you entitled to other benefits? How do you satisfy with your salary and benefits?

9. What qualifications (if any) do you have?

10. What kind of training, if any, do you need for your current job?

11. What would you like to do in the future?

12. What training would you need to reach this goal? (Prompt for content, location, language, length and timing)

13. Have you got any other comments that you would like to make?

14. To finish can we get a few broad details about yourself?

- a. Age _____
- b. Male/female (do not ask)
- c. Ethnicity _____

Thank you very much for your time.

Tool 3: In-depth Interview Guide Local Authorities

Instructions: This is to be used for departments or offices of Culture, Sport and Tourism and Labour, Invalid and Social Affairs at provincial or city levels and other relevant associations)

1. What is the size and nature of the local tourism industry
 - number of tourist arrivals
 - tourism revenue
 - source markets
 - numbers of formal tourism businesses, number of tourist SMEs? Number of employees employed by formal tourism businesses?
 - size of the informal sector: in particular the informal sector categories or informal business groups, estimated number of jobs, income
2. What do you see as the key issues and challenges facing the informal sector?
3. What are the activities of the government and other organizations targeting these groups?
4. What relevant policies and regulations are there covering the informal sector (both current and planned)?
5. What potential opportunities do you see for the informal sector?
6. What types of training programs would be relevant for the informal sector
 - Content
 - Timing
 - Language
 - Approach
 - length etc
7. Can you provide any data, annual reports etc?

Tool 4: Additional in-depth interview questions

A. Questions to Government / Tourism authority

1. What is the number of restaurants in [selected location]? Is it growing / declining?

2. Is demand for restaurant labour in [selected location] growing / declining? If so, what type of jobs are needed? What skills/training is needed?

3. What is the number of small hotels [in selected location]? Is it growing / declining?

4. Is demand for small hotel labour in [selected location] growing / declining? If so, what type of jobs are needed? What skills/training is needed?

5. What is the number of home-stays [in selected location]? Is it growing / declining?

6. Is demand for home-stay labour in [selected location] growing / declining? If so, what type of jobs are needed? What skills/training is needed?

7. Are the number of tour guides in [selected location] growing / declining?

8. Is demand for labour in [selected location] growing / declining? What skills/training is needed?

B. Questions to ask tour operator managers

1. What is the split between customers who are international vs. domestic?

2. What % of your international customers are from Asian countries?

3. What are the main differences in tour preferences between Asian, Western and Vietnamese tourists:

	Vietnamese tourist	Western tourist	Asian tourist
Most popular length of tour			
Most popular tour activities / type of tour			
Eating preferences			
Accommodation preferences			
Tour guide preferences (e.g. Kinh vs. Ethnic)			
Types of souvenirs bought			
Most common compliments			
Most common complaints			
Any other key preferences			

4. Is there need for more trained staff in restaurants? What type of jobs and what skills/training is needed?

5. Is there need for more trained staff in hotels? What type of jobs and what skills/training is needed?

6. Is there need for more training in home-stays? What skills/training is needed?

7. Is there need for more trained tour guides? What skills/training is needed?

Thank you!

TOOL 5:: Questionnaire for Tourists

Location: _____ Survey Number: _____
Date: ____ / ____ / 2011 Interviewer: _____

REACH and SNV Netherlands Development Organisation are conducting a short survey looking at issues impacting on tourism in Vietnam. We hope you can take a few minutes to fill out the survey. All individual results will be kept confidential with only collated data used.

Many thanks for your assistance!

Section A: Background Information

1. What is your nationality?, _____ and country of residence? _____
2. Please indicate your gender ☐ Male ☐ Female, and your exact age? _____
3. What is your job or profession?

<input type="checkbox"/> Professional	<input type="checkbox"/> Middle Management	<input type="checkbox"/> Farmer
<input type="checkbox"/> Technician	<input type="checkbox"/> Clerical/ Service Worker	<input type="checkbox"/> Self - employed
<input type="checkbox"/> Executive/Upper Management	<input type="checkbox"/> Production Worker	<input type="checkbox"/> Student
<input type="checkbox"/> House wife/husband	<input type="checkbox"/> Out of work	<input type="checkbox"/> Retired

Section B: Travel Behaviour

1. How many times have you visited Vietnam? _____
2. What are your main motivations for visiting Vietnam? *(please tick all that apply)*

<input type="checkbox"/> To take a family holiday	<input type="checkbox"/> To experience nature
<input type="checkbox"/> To spend time with my partner	<input type="checkbox"/> To be active and adventurous
<input type="checkbox"/> To relax and rejuvenate	<input type="checkbox"/> To experience local culture and heritage
<input type="checkbox"/> To indulge in a luxurious escape	<input type="checkbox"/> To enjoy the peace and quietness of an uncrowded destination
<input type="checkbox"/> To visit major cities	<input type="checkbox"/> To socialize with friends or meet new people
<input type="checkbox"/> To get off the beaten track	<input type="checkbox"/> Other (please specify) _____
3. Which of the following best describes your travel party?

<input type="checkbox"/> Yourself travelling alone	<input type="checkbox"/> Friends/relatives travelling together WITH children
<input type="checkbox"/> An adult couple (partners in a relationship)	<input type="checkbox"/> Friends/relatives travelling together WITHOUT children
<input type="checkbox"/> A family group - parents and children	<input type="checkbox"/> Independent adults travelling in a large group (no children)
<input type="checkbox"/> Other (please specify) _____	

Section C: Tours

1. During this trip, have you gone on any tours? ☐ Yes ☐ No **Please go to section D**

2. Thinking about your tour experiences during your trip, please indicate your satisfaction level with the following aspects of using a 5-point scale, where **1 means very dissatisfied and 5 means very satisfied**. Please circle your desired response.

	☹		☹		☺	
Booking process & pre trip information	1	2	3	4	5	n/a
Initial welcome	1	2	3	4	5	n/a
Transport	1	2	3	4	5	n/a
Friendliness of guide	1	2	3	4	5	n/a
Presentation of guide	1	2	3	4	5	n/a
Knowledge of guide	1	2	3	4	5	n/a
English language ability of guide	1	2	3	4	5	n/a
Range of activities	1	2	3	4	5	n/a
Payment procedures	1	2	3	4	5	n/a
Value for money	1	2	3	4	5	n/a

3. Overall, what are your Top 3 recommendations for what tour operators in Vietnam need to do in order to provide a better customer experience?

1.

2.

3.

Section D: Small Hotels

1. During this trip, have you stayed at a small hotel that has less than 20 rooms?

☐ Yes

☐ No **Please go to section E**

2. Thinking about your stay(s) at small hotels during your trip, please indicate your satisfaction level with the following aspects of using a 5-point scale, where **1 means very dissatisfied and 5 means very satisfied**. Please circle your desired response.

	☹		☹		☺	
Booking process	1	2	3	4	5	n/a
Check in procedures	1	2	3	4	5	n/a
Comfort of room	1	2	3	4	5	n/a
Cleanliness of room	1	2	3	4	5	n/a
Quality of bathroom	1	2	3	4	5	n/a
Upkeep of room such as lights	1	2	3	4	5	n/a
Friendliness of staff	1	2	3	4	5	n/a
Responsiveness to inquiries	1	2	3	4	5	n/a
English language ability	1	2	3	4	5	n/a
Check out process	1	2	3	4	5	n/a

3. Overall, what are your Top 3 recommendations for what small hotels in Vietnam need to do in order to provide a better guest experience?

1.

2.

3.

Section E: Dining at cafés and restaurants

1. During this trip, have you eaten or had a drink at a café or restaurant?

☐ Yes

☐ No

Go to section F!

2. Thinking about your dining experience(s) at cafes and restaurants during your trip, please indicate your satisfaction level with the following aspects of using a 5-point scale, where **1 means very dissatisfied** and **5 means very satisfied**. Please circle your desired response.

	⊗		⊖		⊕	
Welcome provided	1	2	3	4	5	n/a
Promptness of service	1	2	3	4	5	n/a
Ambience	1	2	3	4	5	n/a
Friendliness of staff	1	2	3	4	5	n/a
Service skills of staff	1	2	3	4	5	n/a
English language ability of staff	1	2	3	4	5	n/a
Personal presentation of staff	1	2	3	4	5	n/a
Range of food and drinks	1	2	3	4	5	n/a
Presentation of food and drinks	1	2	3	4	5	n/a
Quality of food	1	2	3	4	5	n/a
Hygiene standards	1	2	3	4	5	n/a
Quality of bathroom facilities	1	2	3	4	5	n/a
Payment process	1	2	3	4	5	n/a
Value for money	1	2	3	4	5	n/a

3. Overall, what are your Top 3 recommendations for what restaurants and cafes in Vietnam need to do in order to provide a better customer experience?

1.

2.

3.

Section F: Home-stays

1. During this trip, have you stayed at a home-stay

☐ Yes ☐ No **Please stop interview here. Thank you for your participation!**

2. Prior to your trip, what were your expectations of staying in the home-stay?

3. Thinking about your stay(s) at home-stays during your trip, please indicate your satisfaction level with the following aspects of using a 5-point scale, where **1 means very dissatisfied** and **5 means very satisfied**. Please circle your desired response.

	☹		☺		😊	
	1	2	3	4	5	n/a
Welcome provided	1	2	3	4	5	n/a
Quality of food	1	2	3	4	5	n/a
Quality of bedding and sleeping area	1	2	3	4	5	n/a
Quality of shower and toilet facilities	1	2	3	4	5	n/a
Overall cleanness/tidiness of house and garden	1	2	3	4	5	n/a
Tours and activities available	1	2	3	4	5	n/a
Availability of drinks and snacks for purchase	1	2	3	4	5	n/a
Areas to relax	1	2	3	4	5	n/a
Interaction with hosts	1	2	3	4	5	n/a
English language ability	1	2	3	4	5	n/a
Cultural performance	1	2	3	4	5	n/a
Attitude of hosts	1	2	3	4	5	n/a
Maintenance of property	1	2	3	4	5	n/a
Payment process	1	2	3	4	5	n/a
Value for money	1	2	3	4	5	n/a

4. What have been the highlights of your home-stay experience/s?

5. Overall, what are your Top 3 recommendations for what home-stays in Vietnam need to do in order to provide a better home-stay experience?

1.

2.

3.

Thank you for taking the time to participate in this survey, it is very much appreciated!

TOOL 6: Overview of Value Chain

	Item	Description
1	General description of value chain	
2	List of relevant market actors	
3	General description of informal workforce	
4	Links and gaps between informal workforce and formal tourism sector	
5	Skills gaps of final beneficiaries to increase their productivity and income	
6	Factors influencing decisions on quality standards, skills requirements, price	
7	Gender and youth sensitivity issues of the value chain	

Tool 6: Quick scan TVET sector at country level

Questions	Possible document on this topic	Possible actors [1]	Describe
TVET coordination			
Centralized or decentralized structures and TVET: how, who is responsible?	TVET strategy / policy	TVET authority, Ministry of Education / Labour	<i>List main actors and role</i>
What is mentioned in the (TVET) policies / strategies about human resources in the tourism sector?	TVET strategy / policy	Ministry of Education / Employment/ Labour	
	Education sector policy	TVET Board	<i>Describe shortly TVET policies + hrm focus tourism</i>
	Tourism strategy paper	National Employment Agency	
	National (regional) Development Plan / Poverty reduction Paper	Workforce Development Authority	
		Tourism Boards	
Who is in charge for accreditation and registration of tourism training providers?	National Qualification Framework	Ministry of Education / Employment/ Labour	<i>List main actors and role + answer questions</i>
Existing a (National) quality assurance authority?		TVET Board	
Curriculum requirements?		National Qualification Framework committee	
Describe certification procedures		Examination council	
		Accreditation Committee	

TVET Funding mechanisms			
What funding mechanisms are in place?	Skills Development Funds	Ministry of Education / Employment/ Labour	<i>List main actors and role + answer questions</i>
To which extent are there existing national funds for skills training?		TVET Board	
Any training levies for enterprises (or tax reductions?)		National Employment Agency	
		Private sector (unions)	

[1] To be identified by SNV expert		
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Tool 8: Indepth Interview list for (formal and informal) TVET providers

Interviewer: _____

Date: ____/____/____

Name of institution:
Address:
Website:
Contact person
Position:
Email:
Phone

A. Existing and required courses

1. What tourism and business courses do you currently offer? *(List – name, level and duration, get brochures. Short courses?)*

2. How many modules are included in these courses and what is the content? *(Refer to module list at back of questionnaire)*

3. What tourism-related modules do you think are missing? *(Use module list as trigger)*

Top 3 additional modules needed:

1.

2.

3.

Others:

4. What tourism training materials and resources are available to you?

	Available	Need improvement	Don't have, but do need
Specialized trainers in tourism			
Lecturers from other fields who teach tourism courses			
Teaching assistants			
Classrooms			
Text books			
Journals			
Curriculum and teaching materials			
Computers			
Internet access			
Communications			
Financial resources			
Training follow-up for students			
Additional comments:			

B. Structure of courses & process of introducing new courses

5. Module teaching structure (*Include short courses*)

Normal total indicative hours for a module:

Theoretical lesson hours:

Practical lesson hours:

On the job training hours:

Method of evaluation (*Tick all relevant*): ☐ Exam ☐ Essay ☐ Assignment ☐ Research ☐ Internship

Other:

6. Preferred way of delivering courses

- ☐ Face-to-face (traditional classroom) training delivery
- ☐ Workbook independent study
- ☐ Distance education approach with tutor support by mail, fax, email or telephone
- ☐ On the job training
- ☐ Other: _____

7. Do you believe your current courses meet the market demand from private sector tourism companies? If not, what changes are needed?

8. What constraints do you face in the design of new modules/ courses/activities? *(Include administration / timeframe / departments that must be submitted to / who needs to be consulted in the institution and outside the institution)*

9. What are your challenges in updating training modules?

10. If applicable: are courses accredited/ reviewed / registered ? With whom?

C. About your participants/students

10. From where and how do you currently attract your students/ participants?

	%	Where	How
Large private tourism sector companies		N/A	
Government <i>(Indicate department/s)</i>			
Microbusinesses and SMEs		N/A	
Industries outside tourism <i>(Indicate industry/s)</i>			
Students (starting careers)		N/A	
Other			

11. What organisational level do they come from? *(Indicate %)*

Manager:

Mid-level manager:

General staff:

Entry level:

(Micro) business owner:

Other:

12. What level of prior learning do they have? (Indicate %)

Literate & numerate:

Completed primary school:

Completed High School:

Completed tertiary education (university or college):

Applied tourism courses:

Apprentice based learning:

Other:

13. How do you solve entry-constraints for low-skilled workers?

14. What jobs do your students typically go on to do after finishing the course? (Also indicate percent %)

- ☐ Develop a tourism microbusiness/ Self-employed in private tourism sector _____%
- ☐ Employee in tourism sector (e.g. Tourist guide, Tour operator, Travel agent, Hotel, Restaurant, Tourism attraction) _____%
- ☐ Tourism job in a national park or protected area _____%
- ☐ Tourism job in government _____%
- ☐ Not tourism industry _____%
- ☐ Other: _____
_____%

15. Number/type of students/participants (Indicate actual numbers)

Course 1 name: _____ b) No. male/female: _____ c) No. youth: _____ d) No. ethnic minorities: _____	Course 4 name: _____ b) No. male/female: _____ c) No. youth: _____ d) No. ethnic minorities: _____
Course 2 name: _____ b) No. male/female: _____ c) No. youth: _____	Course 5 name: _____ b) No. male/female: _____ c) No. youth: _____

d) No. ethnic minorities: _____	d) No. ethnic minorities: _____
Course 3 name: _____	Course 6 name: _____
b) No. male/female: _____	b) No. male/female: _____
c) No. youth: _____	c) No. youth: _____
d) No. ethnic minorities: _____	d) No. ethnic minorities: _____

D. Cost recovery options

16. How are your courses paid for?

- ☐ By participants
☐ By originating institution
☐ Subsidy or grant
☐ By business
☐ Other: _____

17. How much do your courses cost? (USD)

Cost per module / per course:

Cost per semester:

Cost per year /per quarter/ month / per day / per half day:

18. How do you cooperate with private sector in design and delivery of courses?

Module List

	1	2	3	4
	Have this training	Have this – but training needs improvement	Not available – not needed	Not available - needed
General business modules				
Business management				
Business communications				
Financial management				

Marketing				
Human resources management				
Computer literacy / ICT				
Languages				
Other:				
Specific tourism modules (related to the four sub-sectors: accommodation and restaurants, business skills for informal traders, handicraft Production and Sales and Excursion/guiding-related employment				
Introduction to tourism & hospitality industry				
Customer Care (country context)				
Understanding the needs & wants of the international tourist				
Tourism marketing				
Tourism destination planning and development				
Tourism business planning				
Tourism business development (including entrepreneurship and SME development)				
Responsible and sustainable tourism (including conservation and poverty alleviation)				
Options for local communities in tourism (including joint ventures, public-private partnerships, community based tourism)				
Hotel management				
Hospitality management				
House keeping operations				
Safety, security, First aid				
Protected areas and ecotourism management				
Field guiding (cultural and natural)				
Excursion / event management				
Interpretation of historical, natural and cultural environment				
Food and beverage management				
Transportation for tourists				
Laundry operations				
Front office operation				
Quality management				
Other				
Life Skills				
Interview skills				
Presentation and personal grooming				
Public speaking				

TOOL 12: HITT Round Table Workshop

HITT Launch Workshop November

Wednesday 9 November 2011

The Press Club Hanoi, 59A Ly Thai To

8:00	Registration	
8.30	Introduction REACH video	Tom Derksen Country Director, SNV
8.45	Welcome by representative of EC Delegation to Vietnam	Bryan Fornari, Deputy Head of Cooperation and Development Section
9.00	Introduction to HITT, tourism context and priority geographic areas	Phil Harman, Tourism Sector Leader, SNV
9.15	Value chain selection and analysis	Pham Thi Duyen Anh, Tourism Advisor, SNV
9.30	Visitor satisfaction with service quality	Do Cam Tho, Acting Head – Tourism Market and Product, Institute of Tourism Development Research
9.50	Coffee break	
10.10	Training needs analysis for the informal sector, selected job profiles and competencies and training approach.	Pham Thi Thanh Tam, Director, REACH Director
10.40	Potential alignment with the Environmentally and Socially Responsible Tourism Programme	To be confirmed
11.00	Discussion on training approach	Plenary session
12.00	Identify and agree on 'HITT Round Table' participants and work plan	Pham Thi Duyen Anh, Tourism Advisor, SNV
12.15	Implementation 2012 and 2013	Phil Harman, Tourism Sector Leader, SNV
12.30	Conclude Lunch	All participants

Appendix 2: Scoring Grid Pilot Geographic Areas

	Size of existing tourism market		Growth potential of tourism market		High levels of poverty		Synergies		Total
	30%		20%		25%		25%		
Hoi An	10	3	10	2	3	0.75	9	2.25	37.75
Quang Nam / Other	1	0.3	3	0.6	4	1	7	1.75	16.9
Danang	7	2.1	6	1.2	1	0.25	7	1.75	24.55
Hue	10	3	8	1.6	3	0.75	9	2.25	35.35
Hanoi	10	3	8	1.6	2	0.5	6	1.5	31.1
Lao Cai	5	1.5	4	0.8	6	1.5	7	1.75	25.8
Ha Giang	2	0.6	9	1.8	7	1.75	5	1.25	27.15
Lai Chau	1	0.3	9	1.8	10	2.5	5	1.25	29.6
Dien Bien	2	0.6	9	1.8	7	1.75	5	1.25	27.15
Son La	2	0.6	10	2	7	1.75	5	1.25	28.35
Yen Bai	2	0.6	10	2	4	1	4	1	23.6
Phu Tho	2	0.6	4	0.8	3	0.75	4	1	15.15

Appendix 3: Scoring Grid Sub-Sector Selection

Criteria	Excursion	Cyclo	Boat	Micro Hotel	Homestay	F&B	Metal & wood products	Embroidery	Silk products	Food vendor
Number of target population in value chain (20%)	7	8	3	6	3	9	5	6	7	7
Potential to increase employment for the target population (10%)	4	4	2	8	2	7	3	2	3	4
Potential to increase income for target population (10%)	5	5	4	6	4	4	3	4	3	6
Potential to increase income and/or employment for women, youth and ethnic minorities (10%)	8	1	1	7	8	7	7	8	8	6
Current market demand (20%)	8	4	7	7	4	8	5	6	8	7
Growth potential (20%)	3	3	8	4	4	7	6	5	8	5
Presence of lead firms or other partners willing to invest in value chain development (10%)	7	5	7	8	7	8	2	3\	6	1
Total	6.0	4.5	5.0	6.3	4.3	7.4	4.7	5.1	6.6	5.5

Appendix 4: List of Key Informants for Indepth Interviews

No	Full Name	Time of business/Organisation	Location/Address
Tourist enterprises			
1	Mr. Nguyen Ngoc Long	Owner of Luc Thuy Restaurant	
2	Mr. Le Xuan Phuong	Director DMZ Tourist Joint Stock Company	60 Le Loi Street, Hue City
3	Mr. Dang Xuan Son	Manager of Footprint Travel	06 Le Thanh Tong Street, Hanoi
4	Anton Jurgen	Manager of Exotissimo	26 Tran Nhat Duat Street, Hanoi
5	Arabella Lakin	Environmental and Social Officer, Thien Minh Tourist Joint Stock Company	94 Ma May Street, Hanoi
6	Mr. Nguyen Van Quy	Leader of Hue Tourist Cyclo Association	2 Ngo Quyen Street, Hue City
Tourism authorities			
1	Mr. Le Huu Minh	Deputy director of the Department of Culture, Sport and Tourism of Thua Thien Hue Province	8 Ly Thuong Kiet Street, Hue City
2	Ms. Nguyen Thi Phuong Mai	Head of Occupational Tourism Section, Department of Culture, Sport and Tourism of Thua Thien Hue Province	35 Nguyen Hue Street, Hue City
2	Ms. Dinh Thi Thu Thuy	Head of Bureau of Commerce and Tourism, Hoi An City, Quang Nam Province	35 Phan Boi Chau Street, Hoi An City
4	Mr. Nguyen Dinh Dung	Deputy director, Department of Culture, Sport and Tourism of Lao Cai Province	Office 4,5 – 30/4, Lao Cai City.
5	Mr. Mai Tien Dung	Deputy Director of the Department of Culture, Sport and Tourism Hanoi	47 Hang Dau, Ha Noi
6	Mr. Le Manh Hao	Head of Bureau for Culture and Tourism in Sapa	04 Cau May, Sapa Town, Lao Cai.
7	Mr. Tran Phu Cuong	Head of Vietnam Tourism Council Board	80 Quan Su, Hanoi
9	Mr. Dang Vinh Nham	Head of Personnel Department, Vietnam National Tourism Authority	80 Quan Su, Hanoi
TVET Providers			
1	Mr. Truong Phuoc Hoang Ky	Coordinator, REACH Centre in Hue	Bai Dau Planning Section, Hue city
2	Ms. Nguyen Thi Cuc	Teacher of English, REACH Centre in Hue	Bai Dau Planning Section, Hue city
3	Mr. Vu Hoang Phuong	Deputy Rector of Hue Tourism College	4 Tran Quang Khai Street, Hue City
4	Nguyen Van Binh	Rector of School for Culture, Art and Tourism of	02 Le Quy Don

		Lao Cai	Street, Lao Cai city
5	Mr. Ngo Trung Ha	Head of F & B section, Hanoi Tourism College	Hoang Quoc Viet Street, Cau Giay District, Ha Noi.
7	Mr. Nguyen Duc Hoa Cuong	Head of Tourism Department, Hanoi Foreign Language University	Thanh Xuan District, Hanoi
8	Ms. Shu Tan	Manager of Sapa Ochau	Sapa Town
9	Mr. Nguyen Quang Tue	North Quang Nam Vocational Training School	7B Dien Nam Dong, Dien Ban district, Quang Nam
10	Mr. Duong Van Anh	Rector of Au Lac Private Vocational School	An Duong Vuong street, Hue City.

List of participants for HIT Round Table Workshop

No	Name	Position/Organization	Mailing Address
1	Ms Doãn Thị Thắm	Official of Training Department, Ministry of Culture, Sport and Tourism	Số 51 Ngô Quyền, Quận Hoàn Kiếm, Hà Nội
2	Mr. Đinh Hải	Director of the Department of Culture, Sport and Tourism of Quang Nam Province	2B Trần Phú, thành phố Tam Kỳ
3	Ms. Đinh Thị Thu Thủy	Head of Commerce and Tourism Office of Hoi An City	35 Phan Bội Châu, Hoi An City
4	Ms. Nguyễn Thị Tường Vy	Staff of Commerce and Tourism Office of Hoi An City	35 Phan Bội Châu, Hoi An City
5	Mr. Nguyễn Văn Bình	Dean of Lao Cai Vocational School for Culture, Arts and Tourism	002 Le Quy Don Street, Coc Leu Ward, Lao Cai City, Lao Cai Province
6	Mr Đinh Văn Đáng	Director of Ha Noi Tourism College	Hoàng Quốc Việt Street, Cầu Giấy, Hà Nội
7	Mr Mạnh	General Department of Vocational Training (Tổng cục dạy nghề)	37B Nguyễn Bình Khiêm - Quận Hai Bà Trưng, Hà nội,
8	Ms. Nguyễn Thị Thu Hằng	Programme Officer- Institutional and Private Sector Support - Cooperation Section	Delegation of European Union to Vietnam 17+ 18 Floors -Pacific Place, 83B Ly Thuong 11Kiet, Hanoi
9	Mr. Bryan Fornari	Deputy head of cooperation and development section	Delegation of European Union to Vietnam 17+ 18 Floors -Pacific Place, 83B Ly Thuong Kiet, Hanoi
10	Mr. Jan B Bjamason	Team Leader, ESRT Capacity Development Programme	7 th Floor Institute of Tourism Development and Research 58 Kim Ma Street, Ba Dinh District, Hanoi.
11	Mr. Vincent P. Gibbons	Sector Coordinator/HRD Specialist ESRT Capacity Development Programme	7 th Floor Institute of Tourism Development and Research 58 Kim Ma Street, Ba Dinh District, Hanoi.
12	Mr. Juan Ovejero Dohn	Programme Director, AECID	18 Ngo Van So Street, Hoan Kiem District, Hanoi
13	Ms. Nguyễn Mai Oanh	National Programme Coordinator, Child Labour Project	ILO Office in Vietnam 8 th Floor, 91B Nguyen Thai Hoc Street, Hanoi
14	Mr. Jozef Van Doorn	Team Leader, ILO Project, Strengthening of Inland Tourism in 19 Quang Nam	84 Linh Lang (apt. 201)
15	Mr Phạm Hồng Nguyên	WWF Vietnam Country Programme	D 13 Thang Long International Village.

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16	Ms Renate Bleeken	Project Director, Lux Development	Project VIE/031 2nd floor, Block 6, Kim Lien Hotel, No. 7, Dao Duy Anh Street Hanoi
17	Mr. Trương Nam Thắng	Training Manager, Vietnam Society of Travel Agents	Number 17, Black 4A, Trung Yen Street, Cau Giay District Hanoi
18	Mr. Anton Jurgens	Exotissimo	Ha Noi Office 26, Tran Nhat Duat, Street, Hoan Kiem District, Ha Noi, Vietnam
19	Mr. Achim Munz	Tourism Consultant, Tourism Resource Consultants	Lane Number 63, Lane 31 Xuan Dieu, Tay Ho, Vietnam
20	Mr. Tom Derksen	SNV Director	
21	Ms Phạm Thị Thanh Tâm	Director – REACH Vietnam	25 Vạn Bảo-Hà Nội
22	Mr. Christophe Bane	REACH Project Manager, Plan International	Plan In Viet Nam 10th Floor Capital Building 72 Tran Hung Dao Hanoi.
23	Ms Lê Thị Hoài Nam	Cultural and Tourism Village	Số 1 Hoa Lư
24	Ngô Trung Hà	Hanoi Tourism College	Hoàng Quốc Việt
25	Ms Veronica Bazzoli	Project Consultant, GTV	18, Ngo 31/46 Xuan Dieu, Tay Ho Hanoi
26	Ms. Tản Thị Su	Manager Sapa Ochau Training Centre	Sapa Town
27	Ms Arabella Lakin	Environment and Social Officer, Thien Minh Travel Joint Stock Company	94 Ma May Street Hanoi, Vietnam
28	Mr. Trần Phú Cường	Head of Vietnam Tourism Certification Board	80 Quán Sứ Quận Hoàn Kiếm-Hà Nội
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32	Mr. Phil Harman	SNV Senior advisor	

33	Ms. Phạm Thị Duyên Anh	SNV	
34	Mr Don Taylor	SNV	
35	Mr Nguyễn Văn Thắng	SNV	
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12	Ms. Hoàng Hồng	Báo Tổ quốc – Bộ Văn hóa, Thể thao và Du lịch	Số 20, ngõ 2 Hoa Lư
13	Mr. Mạnh Hà	Báo Du lịch	30 Lý Thường Kiệt
14	Ms. Hà Thanh Giang	Tin Thời sự - Thông tấn xã Việt Nam	79 Lý Thường Kiệt
15	Ms. Lê Thị Thủy	Báo Đại biểu nhân dân	
16	Mr. Vũ Xuân Cường	Báo Tin tức	33 Lê Thánh Tông
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18	Mr. Nguyễn Nam Hùng	Kênh đối ngoại, VTC	
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20	Mr. Lê Hoài Nam	Báo Kinh tế - Đô thị	
21	Ms . Trần Thị Thủy		