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Skills Gaps and Vocational Training in Vietnam's Hospitality Sector: A Policy Analysis in the Context of ASEAN MRA-TP Implementation

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ABSTRACT: Vietnam welcomed 21.17 million international arrivals in 2025 17.8 per cent above the 2019 peak yet the recovery exposed a structural mismatch between demand for skilled hospitality labour and vocational training supply. This study examines the mismatch during 2015–2025 and evaluates the policy and institutional framework against the ASEAN Mutual Recognition Arrangement on Tourism Professionals (MRA-TP). It combines qualitative policy analysis of legal instruments, regional agreements, occupational standards and official statistics with a descriptive reconstruction of labour demand and supply. Evidence is organised across four dimensions: demand dynamics, training capacity, standards and qualifications, and governance. The findings show three distinct phases: expansion (2015–2019), pandemic collapse (2020–2022) and demand recovery without equivalent workforce recovery (2023–2025). Accommodation employment was 502,759 in 2019, when a separate source reported that the wider workforce met about 80 per cent of need, and fell below 400,000 by 2022 against a requirement of about 485,000 at above 70 per cent occupancy; the requirement was projected to exceed 800,000 by 2025. Approximately 20,000 annual graduates from 195 institutions meet only one third of the estimated requirement of 60,000 workers; under a 60 per cent sector-entry assumption, the cumulative unmet requirement reaches 432,000 workers for 2022–2030. Institutional fragmentation compounds the quantitative shortfall: three overlapping occupational standards systems coexist, tourism occupations are not fully referenced to the Vietnamese Qualifications Framework, and systematic registration on the ASEAN Tourism Professional Registration System is not publicly documented. The study concludes that Vietnam's hospitality skills gap is primarily a problem of institutional coherence and proposes five sequenced reforms linking standards consolidation, competency-based certification, co-financing, curriculum renewal and workforce measurement.

1. INTRODUCTION

Human resources are the binding constraint on service quality in tourism and hospitality, an industry whose product is co-produced at the moment of the service encounter and cannot be inventoried or standardised away from the people who deliver it (Baum, 2002; Riley et al., 2002). In emerging destinations the constraint binds harder: demand growth outpaces the maturation of training systems, and the resulting shortfalls are absorbed through informal recruitment, on-the-job improvisation and wage competition for a thin layer of experienced staff (Esichaikul & Baum, 1998; Baum & Szivas, 2008). Vietnam over the decade to 2025 offers an unusually sharp illustration, because the country experienced within ten years a full cycle of rapid expansion, near-total collapse and record recovery, allowing the workforce system's response to be observed under all three conditions.

The demand record is striking. International arrivals rose from 7.94 million in 2015 to 18.01 million in 2019, then collapsed to 0.16 million in 2021 before recovering to 21.17 million in 2025 — a new all-time high, 20.4 per cent above 2024 and 17.8 per cent above the 2019 peak, achieved in a year when Thailand's arrivals contracted (VOV, 2026; Mekong ASEAN, 2026). Accommodation and food service revenue reached an estimated VND 843.1 trillion in 2025 (up 14.6 per cent) and travel service revenue VND 93.9 trillion (up 20.2 per cent), with the government targeting 25 million arrivals for 2026 (Báo Tuyên Quang, 2026; Hà Nội Mới, 2026).

The workforce record diverges sharply from this trajectory. At the 2019 peak the industry supported some 3.07 million jobs, of which about 1.02 million were direct (Viện Nghiên cứu Phát triển Du lịch [ITDR], 2022). The pandemic removed most of that base: in 2020 enterprises cut 70–80 per cent of staff, and by 2021 only a quarter of workers remained in full-time employment while 30 per cent had left or been terminated (Communist Review, 2022). Recovery has not restored it. The national tourism administration assesses the industry as short of 30–40 per cent of experienced workers relative to actual need, with retraining of new hires the norm rather than the exception (MOCST, 2025b). Attrition was concentrated in precisely the cohort from which supervisors and trainers are drawn: 44 per cent of workers with five to ten years of experience and around 90 per cent of postgraduate-qualified staff left the industry during the crisis (BAV, 2024).

This configuration — persistent divergence between the competencies employers demand and those the education and training system supplies, sustained across a full demand cycle — is a structural skills gap in the sense of McGuinness et al. (2018) rather than a cyclical shortage. Its resolution therefore depends less on training volume than on the institutions that connect training to demand: occupational standards, certification, financing and governance.

Vietnam's policy response is embedded in a regional commitment that has attracted comparatively little analytical scrutiny. The ASEAN Mutual Recognition Arrangement on Tourism Professionals, signed by member states in Hanoi in January 2009 and given its operational architecture through the 2012 arrangement and subsequent handbook editions, obliges signatories to align national occupational standards with the ASEAN Common Competency Standards for Tourism Professionals (ACCSTP), to certify workers through accredited national bodies, and to recognise qualifications issued elsewhere in the region across 32 job titles in six labour divisions (ASEAN Secretariat, 2018; Tourism Industry Board, n.d.). MRA-TP is simultaneously an opportunity a channel for Vietnamese workers to reach regional labour markets and for the training system to adopt ready-made standards at low fiscal cost and a competitive exposure, since inadequately certified domestic workers may be displaced by mobile ASEAN professionals in Vietnam's own market (VOV, 2015; Công Thương, 2015).

Existing Vietnamese scholarship on tourism human resources has concentrated on institution-level training practice or on descriptive accounts of workforce shortages, while international hospitality workforce research has engaged with the Vietnamese case mainly through the pandemic-impact literature (Baum et al., 2020). What is missing is a systematic policy analysis connecting decade-length empirical evidence on the skills gap with the architecture of standards, qualifications and governance through which policy attempts to close it, benchmarked against commitments Vietnam has already undertaken. This paper addresses that gap with five objectives: (i) to reconstruct the ten-year trajectory of hospitality labour demand and supply in Vietnam; (ii) to quantify the scale and structure of the skills gap using a transparent flow accounting; (iii) to assess the capacity, composition and orientation of the vocational training system serving the sector; (iv) to evaluate the national standards and qualifications architecture against MRA-TP implementation requirements; and (v) to derive sequenced policy measures for closing the gap within the framework of the Vietnam Tourism Development Strategy to 2030.

2. LITERATURE REVIEW AND ANALYTICAL FRAMEWORK

2.1. Skills gaps, shortages and mismatch

The economics of skills mismatch distinguishes among skills shortages (unfilled vacancies at prevailing wages), skills gaps (incumbent workers lacking competencies their jobs require) and qualification mismatch (workers holding credentials above or below job requirements) (McGuinness et al., 2018). The distinction carries direct policy consequences. Shortages respond to supply expansion and wage adjustment; gaps and mismatches implicate the content of training and, critically, the signalling function of credentials. Where employers cannot infer competence from a qualification, they discount it, retrain on entry, and compress wage differentials between certified and uncertified workers — which in turn weakens the incentive for workers to seek certification and for providers to invest in quality. The equilibrium is a low-credential, low-differentiation labour market that reproduces the gap it emerged from.

Human capital theory supplies the rationale for public co-investment where skills are transferable and firms under-invest for fear of poaching (Becker, 1964). The condition describes hospitality labour markets almost exactly: high turnover, dominance of small and micro enterprises, and reliance on general service competencies portable across employers (Hjalager & Andersen, 2001; Nickson, 2013). Absent a collective financing mechanism, individually rational employer behaviour — hiring trained staff from competitors rather than training one's own produces a socially suboptimal training volume.

2.2. The hospitality workforce problem

A substantial literature documents the distinctive pathologies of hospitality employment: low entry barriers coexisting with genuine skill intensity at supervisory and technical levels; weak occupational identity; compressed wage structures; and chronic underinvestment in training relative to the sector's economic weight (Baum, 2002; Ladkin, 2011). Baum (2015) concluded that after two decades of research and advocacy, structural change in tourism work remained elusive a diagnosis the COVID-19 shock amplified rather than reversed, as mass layoffs destroyed firm-specific human capital and accelerated exit to other sectors (Baum et al., 2020; ILO, 2020). For developing destinations, Esichaikul and Baum (1998) argued that market failure in training provision combined with tourism's strategic importance justifies an active governmental role in human resource development. Baum and Szivas (2008) qualified this: the effectiveness of state involvement depends on coordination with industry and on the credibility of the standards regime, not on the volume of public provision.

2.3. Vocational training, qualifications frameworks and regional recognition

Competency-based training and national qualifications frameworks have become the dominant international template for organising vocational education, on the premise that transparent, industry-defined standards improve both the signalling value of credentials and the portability of skills (Marope et al., 2015). Regional mutual recognition arrangements extend the logic across borders. Within ASEAN, MRA-TP is the most operationally developed of the eight professional MRAs concluded under the ASEAN Economic Community agenda (ILO & ADB, 2014).

Its machinery has five components. The ACCSTP specifies 242 unit descriptors across six labour divisions — front office, housekeeping, food production and food and beverage service in the hotel division; travel agencies and tour operations in the travel division covering 32 priority job titles and 52 qualifications from Certificate II to Advanced Diploma (ASEAN Secretariat, 2018). The Common ASEAN Tourism Curriculum (CATC) translates these standards into teachable programmes. National Tourism Professional Boards and Tourism Professional Certification Boards, designated by each member state, oversee assessment and certification. The Regional Qualifications Framework and Skills Recognition System links national qualifications to a common reference. Finally, the ASEAN Tourism Professional Registration System (ATPRS), launched in 2015–2016, registers certified ASEAN Tourism Professionals and functions as a regional job-matching platform; its designers anticipated more than 6,000 registrations in the first year of operation (AADCP II, 2015; TTG Asia, 2016).

MRA-TP therefore supplies an unusually concrete benchmark. A member state's progress can be assessed against five observable conditions: alignment of national standards with ACCSTP, adoption of a CATC-referenced curriculum, functioning certification bodies, completed qualifications referencing, and actual registration of certified professionals. Comparative work on ASEAN implementation has noted uneven domestication across member states, with the Philippines assigning the certification function to its Technical Education and Skills Development Authority and Indonesia routing certification through enterprise- and school-attached professional certification bodies (Tourism Industry Board, n.d.; SEAMOLEC, n.d.).

2.4. Analytical framework

Synthesising these strands, this paper analyses Vietnam's hospitality skills problem along four dimensions (Figure 1). *Demand dynamics* covers the scale, growth and composition of labour demand. *Supply capacity* covers the volume, content and retention performance of vocational training. *Standards and qualifications architecture* covers the coherence of occupational standards, the national qualifications framework and certification arrangements. *Governance* covers the distribution of mandates, financing instruments and industry linkage. The framework treats the skills gap as the joint product of all four rather than of training supply alone, consistent with the mismatch literature's insistence that gaps persist when standards fail to transmit demand signals to providers. MRA-TP enters as an external benchmark against which the third dimension in particular can be evaluated without recourse to purely normative judgement.

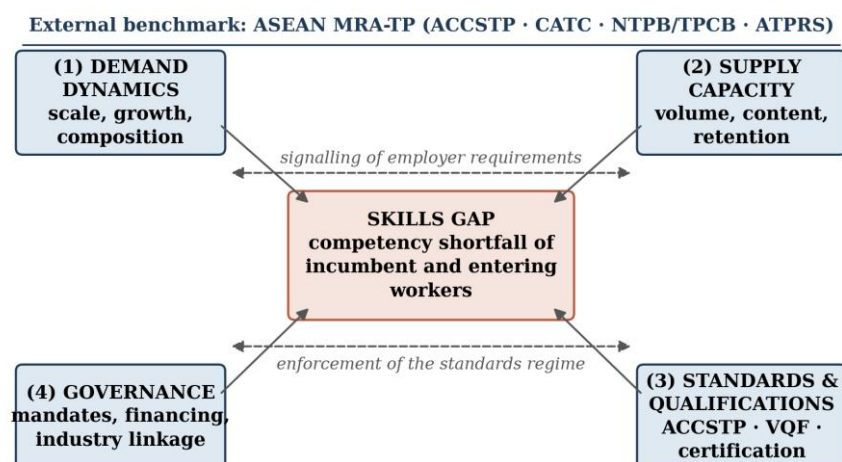


Figure 1. Analytical framework for assessing the hospitality skills gap

Source: Authors' construction, drawing on McGuinness et al. (2018), Baum and Szivas (2008) and ASEAN Secretariat (2018).

3. DATA AND METHODS

3.1. Research design

The study employs qualitative policy analysis based on documentary evidence, complemented by descriptive quantitative reconstruction of a ten-year data series and a transparent flow accounting of the demand–supply balance. This design suits an object of analysis that is the policy system itself rather than firm- or worker-level behaviour, and it mirrors the approach used in institutional assessments of other Vietnamese policy domains where administrative data rather than survey microdata constitute the available evidence base.

3.2. Documentary corpus

The corpus spans 2015–2026 and comprises five groups, summarised in Table 1. Each document was coded against the four framework dimensions of Section 2.4. Quantitative indicators were triangulated across at least two independent sources wherever available; where only a single authoritative source exists, this is stated in the relevant table note.

Table 1. Composition of the documentary corpus

Group	Principal items	Framework dimension informed
National legal and strategic instruments	Law on Vocational Education and Training (2014); Tourism Law (2017); Politburo Resolution 08-NQ/TW (2017); Vietnam Tourism Development Strategy to 2030 (Decision 147/QĐ-TTg, 2020); Vietnamese Qualifications Framework (Decision 1982/QĐ-TTg, 2016)	Standards; governance
Regional instruments	ASEAN MRA-TP and Handbook (2nd ed., 2018); ACCSTP unit descriptors; CATC; ASEAN Tourism Strategic Plan 2016–2025; ATPRS documentation	Standards
Occupational standards documentation	Vietnam Tourism Occupational Standards (VTOS 2013/2015) developed under the EU-funded ESRT Programme; national occupational skills standards issued by the culture-and-tourism ministry	Standards; supply

Group	Principal items	Framework dimension informed
Official statistics	Arrivals, revenue and establishment series published by the Viet Nam National Authority of Tourism and the statistics office, 2015–2026	Demand
Sectoral assessments	Workforce estimates and training-capacity reporting by the Vietnam Tourism Association, the Vietnam Tourism Education Association and the Institute for Tourism Development Research, reported through the ministry portal and established national media	Demand; supply; governance

Source: Authors' compilation based on the National Assembly of Vietnam (2014, 2017), the Prime Minister of Vietnam (2016, 2020), the Central Committee of the Communist Party of Vietnam (2017), the ASEAN Secretariat (2016, 2018), AADCP II (2015), the ESRT Programme (2015), the Ministry of Culture, Sports and Tourism (2016), and the Institute for Tourism Development Research (2022).

3.3. Flow accounting

Section 5.2 develops a stock-flow accounting of the accommodation-sector labour balance. The method is deliberately simple and fully specified so that readers may substitute their own parameters: annual unmet requirement equals the estimated annual incremental labour requirement minus estimated net entrants from formal training, where net entrants equal formal graduates multiplied by a sector-entry rate. Two scenarios are reported an optimistic case in which every graduate enters and remains in the sector, and a baseline case using a 60 per cent entry rate.

3.4. Limitations

Four limitations should be stated at the outset. First, Vietnam does not publish a regular, methodologically consistent tourism labour force survey; workforce magnitudes originate from the national tourism administration, industry associations and the sectoral research institute, and their definitional bases differ. Section 4.2 treats this inconsistency as a finding in its own right rather than concealing it. Second, media-reported figures, even when attributed to official speakers, may compress definitional nuance notably between direct and total tourism employment. Third, documentary analysis cannot capture informal training effort within firms, which in hospitality is substantial; the findings therefore concern the formal system's capacity and coherence. Fourth, the analysis is national in scope and does not resolve the pronounced regional variation in labour market tightness between major destinations and secondary provinces.

4. FINDINGS

4.1. Demand dynamics over the decade 2015–2025

Vietnamese tourism demand over the study period divides into three distinct phases (Figure 2, Table 2). Phase I (2015–2019) was one of sustained expansion: international arrivals rose from 7.94 million to 18.01 million, a compound annual growth rate of approximately 22.7 per cent, with 2016 alone adding more than two million arrivals at the time the largest absolute annual increase on record following visa exemptions for five Western European markets (Công Thương, 2016; thongke.tourism.vn, 2017). In 2019 Vietnam's arrival growth of 16.2 per cent far exceeded the global average of 3.8 per cent and the Asia-Pacific average of 4.6 per cent, and tourism's direct contribution to GDP rose from 8.3 per cent in 2018 to 9.2 per cent in 2019 (ITDR, 2022).

Phase II (2020–2022) was one of near-total collapse. Arrivals fell to 3.69 million in 2020 — a decline of more than 80 per cent and to 0.16 million in 2021, the overwhelming majority of whom were business travellers and technical experts rather than tourists (Nhan Dan Newspaper, 2021). Sector losses were estimated at USD 23 billion in 2020, with total tourism revenue down 58.7 per cent (ITDR, 2022). More than 35 per cent of licensed international tour operators surrendered their licences (Communist Review, 2022).

Phase III (2023–2025) was one of rapid and ultimately record recovery, with arrivals reaching 12.60 million in 2023 (70 per cent of the 2019 level), 17.58 million in 2024 (98 per cent) and 21.17 million in 2025 (117.8 per cent). Domestic tourism recovered faster still, exceeding its pre-pandemic record as early as 2022 and reaching 110 million trips in 2024.

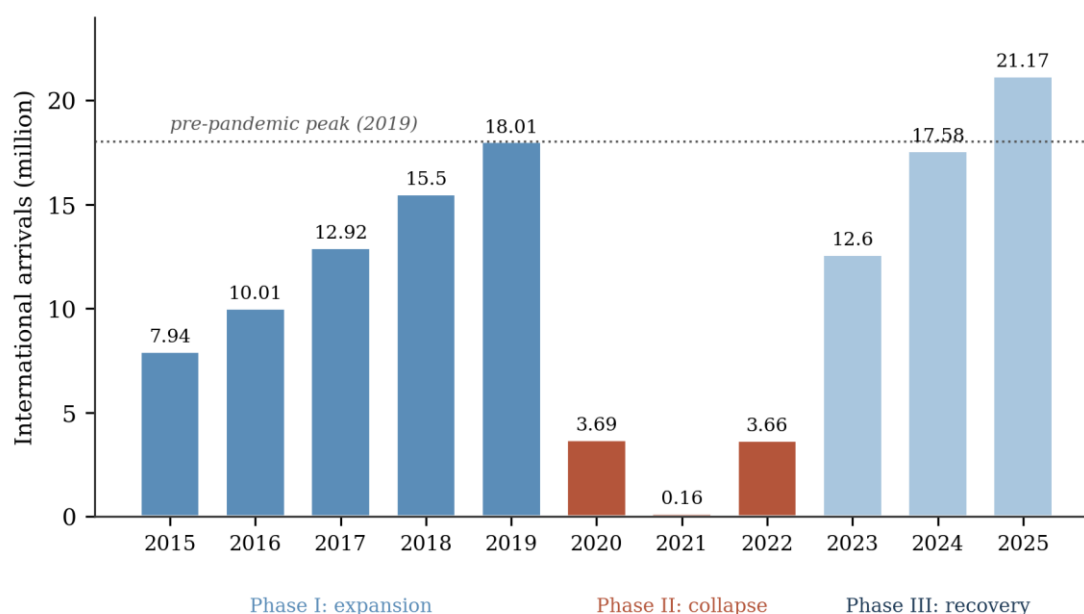


Figure 2. International arrivals to Vietnam, 2015–2025 (million)

Source: Compiled from Viet Nam National Authority of Tourism and statistics office releases; see Table 2 for details.

Table 2. Tourism demand and capacity indicators, Vietnam 2015–2025

Year	International arrivals (million)	Change (%)	Domestic trips (million)	Notable capacity development
2015	7.94	–	57.0	Baseline year; MRA-TP obligations enter force with AEC
2016	10.01	+25.0	62.0	First year above 10 million; tourism revenue VND 417 trillion
2017	12.92	+29.1	73.2	Resolution 08-NQ/TW; revised Tourism Law
2018	15.50	+19.9	80.0	Ceremony for the 15-millionth arrival
2019	18.01	+16.2	85.0	~30,000 accommodation establishments, ~650,000 rooms
2020	3.69	–79.5	56.0	Sector losses ~USD 23 billion
2021	0.16	–95.7	66.0	Border effectively closed for ~19 months
2022	3.66	+2,187	101.3	Reopening from March; domestic trips exceed 2019 record

Year	International arrivals (million)	Change (%)	Domestic trips (million)	Notable capacity development
2023	12.60	+244.3	108.0	~38,000 establishments, ~780,000 rooms
2024	17.58	+39.5	110.0	4,170 international tour operators; 40,720 licensed guides
2025	21.17	+20.4	112.0	All-time record; accommodation and F&B revenue VND 843.1 trillion

Source: Authors' compilation based on data from the Tourism Statistics Database of the Vietnam National Authority of Tourism (2017, 2024, 2025), the Industry and Trade Newspaper (2016), the Institute for Tourism Development Research (ITDR) (2022), Vietnam Investment Review (2024), Voice of Vietnam (VOV) (2026), and Tuyen Quang Online Newspaper (2026).

Two features of this trajectory matter for the workforce analysis. First, the recovery has been faster than any plausible rate of skill formation: arrivals rose by 8.57 million between 2023 and 2025, an increase of 68 per cent in two years, while a hotel supervisor requires several years of graded experience to develop. Second, capacity expansion has been continuous even through the collapse: room stock grew from roughly 650,000 in 2019 to about 780,000 in 2023, an increase of 20 per cent achieved precisely while the workforce was contracting (Vietnam Investment Review, 2024). Physical capacity and human capacity have therefore diverged.

4.2. The workforce: composition, collapse and incomplete recovery

Table 3 assembles the available workforce indicators. Read together, they show that a documented shortfall was already present at the 2019 peak, deepened sharply during the pandemic and persisted into the recovery while accommodation-sector requirements rose faster than workforce replenishment. Because the sources use different populations and occupancy assumptions, the indicators are benchmarks rather than a balanced time series.

Table 3. Hospitality and tourism workforce indicators, 2017–2025

Indicator	2017	2019	2022	2024–2025
Tourism workforce estimate (direct + indirect)	>2.50m	3.070m	~2.50m [a]	~2.50m (2025)
Direct tourism workforce estimate	750,000	1,023,000	~800,000 [a]	~800,000 (2025)
Accommodation-sector workers (reported actual)	NR	502,759	<400,000	NR
Accommodation workforce required (>70% occupancy)	NR	NR	~485,000	>800,000 (2025 projection)
Of which managerial (requirement)	NR	NR	~45,000	NR
Accommodation workers per room (actual)	NR	~0.77 [b]	<0.60 (~0.40 rated)	NR

Indicator	2017	2019	2022	2024–2025
Reported workforce shortfall (scope varies)	NR	~20% [c]	>17.5% [d]	30–40% experienced staff
Licensed tour guides (end-year)	20,416	27,683	33,768	40,720 (2024)

Source: Authors' compilation and calculations based on the Institute for Tourism Development Research (ITDR) (2022); the Ministry of Culture, Sports and Tourism (MOCST) (2022, 2025a, 2025b); the Viet Nam National Administration of Tourism (2017, 2019); the Viet Nam National Authority of Tourism (2023, 2024); VnExpress (2020); and VnEconomy (2022).

Three observations follow. First, the published evidence does not support a numerical 2019 surplus. The 502,759 accommodation-worker count relates to 2019, whereas the 485,000 requirement at above 70 per cent occupancy was reported in 2022; treating them as contemporaneous would be invalid. A separate 2019 source reported that the workforce met about 80 per cent of need at 53 per cent occupancy, indicating that a shortfall predated the pandemic and subsequently deepened (VnExpress, 2020; VnEconomy, 2022; Figure 3).

Second, the deterioration is visible in labour intensity as well as headcount. Dividing reported accommodation employment by room stock yields roughly 0.77 workers per room in 2019, while the 2022 source reported fewer than 0.60 overall and about 0.40 at rated establishments (VnEconomy, 2022). These benchmarks were reported under different occupancy conditions and should therefore be read directionally rather than as a strict time series. Even so, they indicate that an expanded room stock was operating with a thinner staffing layer.

Third, the composition of attrition matters more than its volume. The loss of 44 per cent of workers with five to ten years' experience and around 90 per cent of postgraduate-qualified staff removed the middle of the experience pyramid (BAV, 2024). Because supervisors, departmental heads and in-house trainers are drawn from precisely this cohort, its loss impairs the sector's capacity to train its own replacements — a second-order effect that lengthens the recovery period well beyond the time needed to rehire entry-level staff.

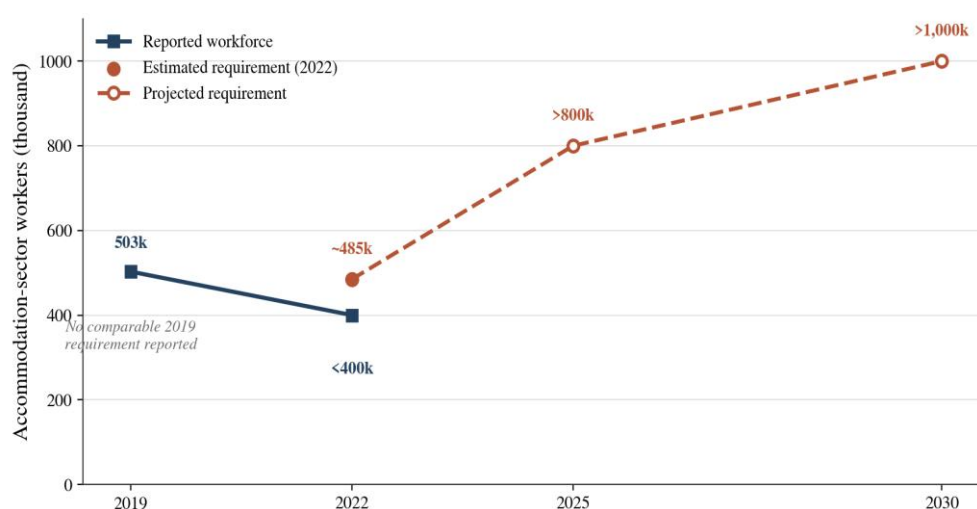


Figure 3. Published accommodation workforce and requirement benchmarks, 2019–2030

Source: Requirement benchmarks from the Viet Nam Tourism Association and the Hotel Department, reported in VnEconomy (2022); workforce figures from ITDR (2022) and VnEconomy (2022). No comparable 2019 requirement was identified; the requirement series therefore begins in 2022.

A methodological finding deserves emphasis. The workforce estimates in Table 3 are mutually inconsistent in their definitional bases. The sectoral research institute reports that in 2017, of 750,000 direct workers, 45 per cent had been trained in tourism, 35 per cent trained in other fields and 20 per cent had no training (ITDR, 2022). The national tourism administration reports that about 23 per cent of the tourism workforce has been formally trained from elementary level upwards, rising to roughly 42 per cent when short training of under three months is included (Nguoi Lao Dong Newspaper, 2024). These figures cannot both describe the same population: the first refers to direct workers and counts any post-secondary training, the second refers to the whole workforce and counts formal vocational qualifications. Neither is wrong; but the absence of a single authoritative series means that Vietnamese tourism workforce policy is steered by indicators that cannot be reconciled itself a governance finding, addressed in Section 4.5.

4.3. Training supply: structure, volume and content

Vietnam's tourism training system is numerically substantial. According to the Vietnam Tourism Education Association, the country has 195 tourism training institutions: 65 universities with tourism faculties, 55 colleges (of which 10 specialise in tourism, 8 of these under the culture-and-tourism ministry), 71 secondary vocational schools and 4 vocational training centres (Vietnam Investment Review, 2024; VOV2, 2024). Intake is approximately 22,000 per year and graduation approximately 20,000, with an additional 5,000 or so completing elementary or sub-three-month apprenticeship training (Đại biểu Nhân dân, 2024). Table 4 sets out the structure.

Table 4. Structure of the tourism training system

Provider type	Number of institutions	Reported annual output
Universities with tourism faculties	65	~1,800 university and professional-college students
Colleges (incl. 10 specialised tourism colleges)	55	~2,100 vocational college students
Secondary vocational schools	71	~18,200 secondary-level students
Vocational training centres	4	~5,000 elementary / sub-3-month trainees
Total	195	~20,000 graduates from ~22,000 intake

Source: Vietnam Investment Review (2024); VOV2 (2024); People's Deputies Newspaper (2024).

Three structural weaknesses emerge from the documentary evidence.

Volume. Annual output of about 20,000 graduates covers roughly one third of the estimated 60,000 workers needed each year in the accommodation subsector alone before accounting for travel services, transport and the wider tourism economy, and before allowing for the share of graduates who never enter or quickly leave the sector (Figure 4(a)). The coverage ratio is therefore at most 33 per cent and realistically lower.

Composition. The distribution across levels is heavily weighted towards secondary vocational qualifications: approximately 18,200 of the 22,000 intake, against roughly 1,800 at university and professional-college level. The pyramid is thus wide at the base and extremely narrow at the level from which supervisory and managerial staff are drawn exactly the level at which the pandemic attrition was most severe, and exactly the level at which MRA-TP job titles such as Front Office Manager, Executive Housekeeper and Executive Chef sit.

Content. Employers routinely retrain new recruits, indicating a content gap in addition to the volume gap. The Deputy Director-General of the national tourism administration has characterised the problem as training and deployment that are “insufficiently synchronised, insufficiently systematic and not standardised”, producing graduates capable of basic practice but few high-level professionals (Đại biểu Nhân dân, 2024). Three content deficits recur: practical training infrastructure, which institutions

adopting VTOS report took years of incremental investment to assemble foreign language proficiency; and digital competence, at a time when property management systems, online travel agency channel management, customer relationship platforms and data-driven marketing have become routine hiring criteria in the accommodation segment.

Retention. Supply-side capacity is further eroded by conditions in the destination labour market. Applications in the restaurant and hotel segment fell 28.3 per cent year on year in the first half of 2025, and only 17.9 per cent of surveyed workers in the segment expressed satisfaction with pay and benefits, while 57.1 per cent reported an intention to seek work elsewhere (24h, 2025). The same conditions that drive incumbent attrition depress the applicant pipeline into training, closing a feedback loop between labour market quality and training supply.

Figure 4(b) displays the resulting qualification structure of the workforce: about 23 per cent formally trained from elementary level upwards, a further 19 per cent with short training of under three months, and roughly 58 per cent with no recorded training.

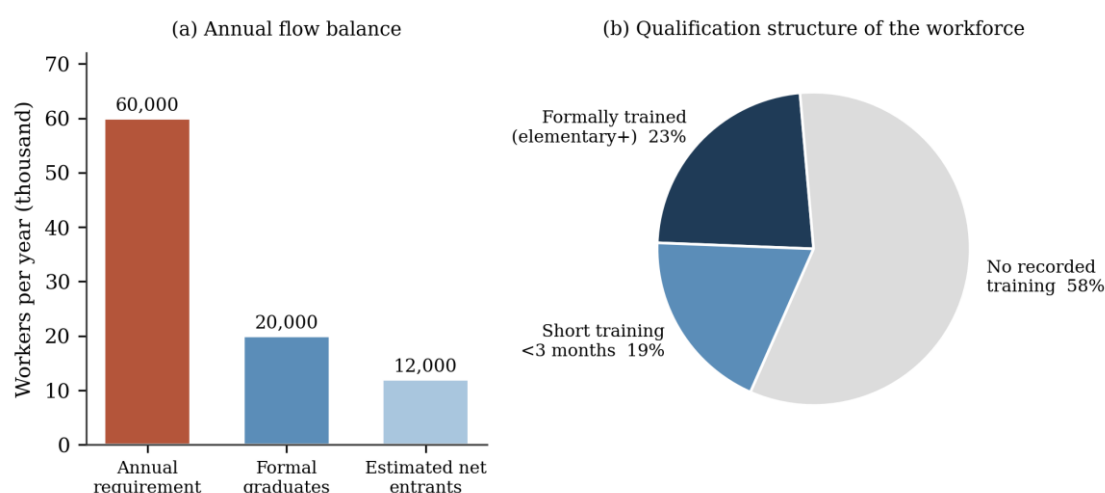


Figure 4. Annual flow balance and qualification structure of the hospitality workforce

Source: Panel (a) authors' calculation from *Đại Đoàn Kết* (2024) and *Vietnam Investment Review* (2024), with the net-entrant estimate based on the 60 per cent entry assumption specified in Section 5.2; panel (b) from *Người Lao Động Newspaper* (2024).

4.4. Standards and qualifications architecture: proliferation without consolidation

Vietnam's formal commitments are unambiguous. Resolution 08-NQ/TW (2017) elevated tourism to a spearhead economic sector and directed the modernisation of tourism human resource development. The Tourism Law (2017) established the legal basis for professional standards in guiding and accommodation services. The Tourism Development Strategy to 2030 set workforce professionalisation targets (Thủ tướng Chính phủ, 2020). The Vietnamese Qualifications Framework, adopted by Decision 1982/QĐ-TTg in 2016 with eight levels, was designed for referencing against the ASEAN Qualifications Reference Framework (Thủ tướng Chính phủ, 2016). On the regional plane, Vietnam discharged its formal MRA-TP obligations early: the culture-and-tourism minister notified the ASEAN Secretary-General that the Vietnam Tourism Certification Board (VTCB) would perform the functions of both the National Tourism Professional Board and the Tourism Professional Certification Board (VOV, 2015).

Implementation, however, has been characterised by proliferation rather than consolidation. Table 5 sets out the three occupational standards systems that coexist in Vietnamese tourism.

Table 5. Coexisting occupational standards systems in Vietnamese tourism

Attribute	National occupational skills standards	VTOS	ACCSTP (via MRA-TP)
Issuing authority	Culture-and-tourism ministry	Developed under EU-funded HRDT (2004–2010) and ESRT programmes; approved by VTCB	ASEAN, adopted by member states
Coverage	8 occupations	10 occupations; 13 occupations at basic level; up to 45 proposed certificates from trainee to senior management	6 labour divisions, 32 job titles, 242 unit descriptors, 52 qualifications
Assessment mechanism	National skills assessment arrangements	VTCB assessment sessions; ~3,000 accredited VTOS trainers	National TPCB assessment against ACCSTP
Legal status	Regulatory	Voluntary benchmark, adopted institution by institution	Binding regional commitment; domestic effect depends on transposition
Regional portability	None	None directly	Full, subject to ATPRS registration

Source: Authors' compilation based on the Industry and Trade Newspaper (2015); the Ministry of Culture, Sports and Tourism (MOCST) (2016); the ESRT Programme (2015); the ASEAN Secretariat (2018); and CHM (2020).

These systems overlap in coverage but differ in structure, assessment methodology and certification pathway. A worker, employer or training institution therefore confronts competing definitions of competence for the same job title. The consequence is a direct attack on the signalling function that standards exist to provide: if three certificates may attest to the same role and none is authoritative, employers rationally discount all three and retrain on entry the behaviour Section 4.3 documented.

Figure 5 maps the five MRA-TP components against Vietnam's state of domestication. The pattern is consistent: the institutional shells exist, but the operating content does not. VTCB was designated, and roughly 3,000 VTOS trainers were accredited under the EU programmes, but assessment volume remains modest relative to a direct workforce of about one million (BVHTTDL, 2016; CHM, 2020). The VQF was adopted, but the referencing of tourism occupations to its levels the precondition for both domestic wage differentiation by skill and regional recognition has not been completed. The ATPRS exists and was designed to carry more than 6,000 registrations in its first year across ASEAN (AADCP II, 2015), yet no published evidence indicates systematic registration of Vietnamese tourism professionals, and the mobility channel the arrangement was designed to open has not carried significant traffic in either direction.

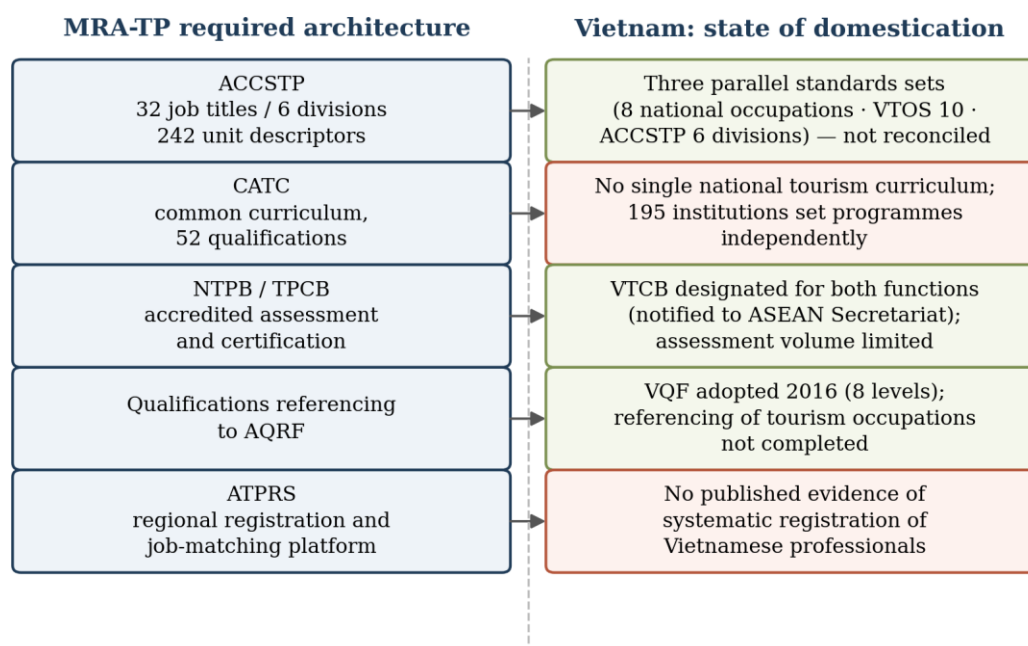


Figure 5. MRA-TP required architecture and Vietnam's state of domestication

Source: Authors' assessment based on the ASEAN Secretariat (2018); the Industry and Trade Newspaper (2015); Voice of Vietnam (VOV) (2015); the Ministry of Culture, Sports and Tourism (MOCST) (2016); the Prime Minister of Vietnam (2016); and AADCP II (2015).

It should be noted that the standards themselves are not deficient. VTOS was developed by international and Vietnamese experts, revised in 2013 and disseminated with full trainer, trainee and assessor materials; ACCSTP was negotiated with Vietnamese participation and is accompanied by 242 unit descriptors and associated toolboxes. The deficiency is architectural: three good systems that do not resolve into one enforceable national standard.

4.5. Governance: fragmented mandates in a period of institutional transition

Responsibility for tourism workforce development is distributed across the tourism administration (sector policy and professional standards), the vocational education authorities (training regulation and quality assurance) and the education ministry (higher education programmes), with provincial governments and industry associations occupying intermediating roles. Table 6 maps the arrangement.

Table 6. Institutional mapping of tourism workforce governance

Function	Responsible body	Assessment
Sector workforce policy	Viet Nam National Authority of Tourism (culture-and-tourism ministry)	Sets direction; limited instruments over providers
Occupational standards for tourism	Culture-and-tourism ministry; VTCTB	Standards issued but not consolidated (Table 5)
Certification and assessment	VTCTB (designated NTPB and TPCB)	Formally compliant with MRA-TP; capacity constrained

Function	Responsible body	Assessment
Vocational training regulation	Vocational education authorities, transferred to the education ministry in the 2025 restructuring	Opportunity for unification; transitional friction in the short run
Higher education programmes	Ministry of Education and Training	Programme approval decoupled from occupational standards
Industry voice	Vietnam Tourism Association; Vietnam Tourism Education Association	Advisory; no statutory financing role
Training finance	State budget via institutional allocations	No levy or matched-fund instrument; funding not linked to certification outcomes

Source: Authors' compilation.

Two governance weaknesses are decisive. The first is financing. There is no compulsory levy or co-financing instrument obliging enterprises to fund the transferable training from which they benefit, so the under-investment predicted by human capital theory persists undisturbed (Becker, 1964; Baum & Szivas, 2008). Public funding flows predominantly through institutional budgets rather than through competency-based certification outcomes, so providers face no financial consequence for graduating students whom employers must retrain precisely the incentive structure that sustains the content gap identified in Section 4.3.

The second is coordination. The 2025 transfer of state management of vocational education to the education ministry creates a genuine opportunity to unify academic and vocational tourism training under one regulator, but in the short run it has added transitional friction at the moment the sector's deficit is most acute. More fundamentally, no standing mechanism convenes the state, industry associations and providers around a common evidence base which returns to the measurement problem of Section 4.2. Policy cannot steer what the statistical system does not measure consistently.

4.6. Composite assessment

Table 7 consolidates the assessment across the four framework dimensions, with MRA-TP implications stated for each.

Table 7. Composite gap assessment against MRA-TP implementation requirements

Dimension	Principal evidence, 2015–2026	Direction of travel	MRA-TP implication
Demand dynamics	Arrivals 7.94 m (2015) → 18.01 m (2019) → 0.16 m (2021) → 21.17 m (2025); room stock +20% during the collapse; 30–40% shortage of experienced workers	Demand rising faster than skill formation	Rising exposure to inward mobility of certified ASEAN professionals in supervisory roles
Supply capacity	195 institutions; ~20,000 graduates against ~60,000 annual requirement; 23% of workforce formally trained; intake concentrated at secondary level	Volume static, composition mismatched	Insufficient certified pipeline to populate ATPRS or meet ACCSTP-referenced demand

Dimension	Principal evidence, 2015–2026	Direction of travel	MRA-TP implication
Standards architecture	Three coexisting standards sets; VQF referencing of tourism occupations incomplete; VTCB designated but assessment volume limited	Formally compliant, materially incomplete	Core MRA-TP machinery present but not operating at scale
Governance	Mandates split across ministries amid 2025 restructuring; no industry co-financing instrument; funding not linked to certification outcomes; irreconcilable workforce statistics	Transitional; instruments absent	Weak domestic enforcement of the standards regime MRA-TP presupposes

Source: Authors' synthesis from the documentary corpus described in Section 3.

5. DISCUSSION

5.1. A structural gap, not a cyclical shortage

The decade-length evidence supports the structural-gap rather than cyclical-shortage diagnosis on three grounds. First, timing: a shortfall was already reported in 2019, when the workforce met about 80 per cent of need at 53 per cent occupancy; the post-pandemic shock then deepened it, with accommodation employment below 400,000 against about 485,000 required in 2022 and a requirement projected above 800,000 for 2025 (VnExpress, 2020; VnEconomy, 2022). A purely cyclical shortage would be expected to ease as demand normalised; this one persisted and widened. Second, the persistent content deficit is evidenced by the routine retraining of new hires irrespective of labour-market tightness, indicating a defect in what training delivers rather than only in how much of it there is. Third, the signalling failure documented in Section 4.4 supplies a mechanism by which the gap reproduces itself, consistent with international evidence that mismatch is sustained by weak signalling institutions rather than by training volume alone (McGuinness et al., 2018) and with Baum's (2015) observation that hospitality's structural workforce problems resist purely supply-side remedies.

5.2. The arithmetic of the gap

The magnitude of the challenge can be made explicit with a transparent flow accounting. Let R denote the annual incremental labour requirement in the accommodation subsector, G the annual number of formal graduates, and e the sector-entry rate — the share of graduates who enter and remain in tourism employment. Annual unmet requirement U is then:

$$U = R - (G \times e)$$

Taking $R = 60,000$ and $G = 20,000$ as reported, the optimistic case ($e = 1.0$, every graduate enters and stays) yields $U = 40,000$ per year.

Cumulated over the 2022–2030 period for which the requirement was projected, the optimistic case implies an unmet requirement of 360,000 workers and the baseline case 432,000 (Figure 6). For context, the baseline figure exceeds the entire reported accommodation workforce of 2019. Even the optimistic case, which assumes a retention performance no hospitality labour market in the region achieves, leaves a deficit larger than the sector's 2022 headcount.

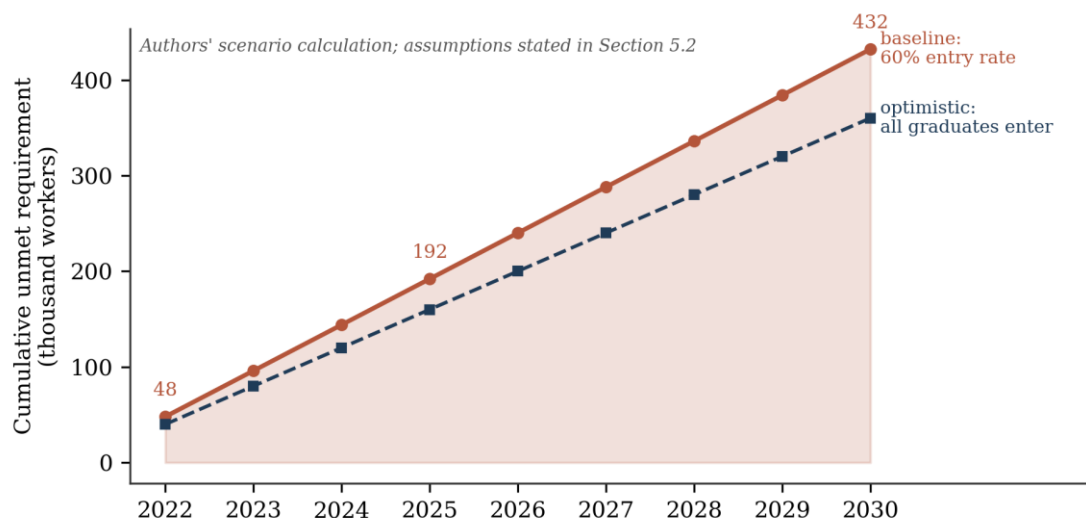


Figure 6. Cumulative unmet labour requirement under two entry-rate scenarios, 2022–2030

Source: Authors' scenario calculation. Parameters and assumptions are specified in this section; readers may substitute alternative values.

Two implications follow. First, no feasible expansion of formal training closes this gap on its own: tripling graduate output—an implausible objective within a decade, given infrastructure and faculty constraints—would only bring supply to parity with requirement, leaving the accumulated deficit untouched. The arithmetic therefore points towards recognition of prior learning and workplace-based certification of the incumbent workforce, which converts existing experienced but uncredentialed workers into recognised professionals without requiring them to re-enter full-time education. With roughly 58 per cent of the workforce holding no recorded training (Figure 4(b)), this is where the largest addressable stock lies.

Second, the sensitivity of U to e is policy-relevant in its own right. Raising the entry rate from 0.6 to 0.8 reduces annual unmet requirement by 4,000 workers an effect comparable to adding a fifth to total graduate output, but achievable through retention measures (pay, conditions, career structure) rather than through capital investment in training capacity. Retention policy and training policy are substitutes at the margin, and the former is considerably cheaper.

5.3. MRA-TP reframes a resource problem as a coherence problem

The regional benchmark changes the diagnosis in an important way. Vietnam does not lack standards; it has too many, imperfectly reconciled. The ACCSTP and CATC offer a ready-made, regionally legitimate reference architecture whose adoption costs are largely political and administrative rather than fiscal — the standards already exist, the toolboxes are developed, and Vietnam participated in negotiating them (ASEAN Secretariat, 2018). Consolidation would convert three partial investments into one enforceable national floor at comparatively low marginal cost.

The comparative record within ASEAN reinforces the point. The Philippines assigned the certification function to an established national skills authority with existing assessment infrastructure; Indonesia routed certification through school- and enterprise-attached certification bodies applying the ACCSTP scheme directly, with vocational schools integrating the CATC into daily teaching and registering both graduates and industry partners on the ATPRS (Tourism Industry Board, n.d.; SEAMOLEC, n.d.). In each case domestication proceeded by attaching MRA-TP machinery to an existing high-volume institution rather than by building parallel structures. Vietnam's configuration inverts this: a designated certification board of limited assessment capacity sits alongside, rather than inside, a training system of 195 institutions and 22,000 annual intake. Attaching ACCSTP-referenced assessment to that existing volume rather than operating certification as a separate stream is the structural lesson available from regional peers.

This reading also recasts the Thai experience analysed by Esichaikul and Baum (1998). Government involvement in hotel-sector human resource development succeeded there where the state supplied the coordination and credential credibility that fragmented private markets could not, rather than substituting for industry training effort. Vietnam's configuration is the mirror

image: substantial public training provision coexisting with weak coordination and credentialing, producing volume without signal.

5.4. Asymmetric competitive stakes

The regional competitive exposure is asymmetric in time. Outward mobility of Vietnamese professionals under MRA-TP remains largely hypothetical so long as certification volumes stay low, because unregistered workers are invisible to the matching platform. Inward mobility, by contrast, requires only that regional employers and workers use machinery Vietnam has already recognised. As Vietnamese room stock expands towards the projected 1.3–1.45 million rooms by 2030, internationally branded operators whose supervisory standards are specified corporately will source certified staff from wherever they are available. The window in which Vietnam can convert MRA-TP from a latent competitive threat into a workforce development instrument is therefore bounded by the pace of its own hotel investment pipeline, not by the pace of its administrative reform.

5.5. A caution on target-setting

The 2026 target of 25 million international arrivals implies continued double-digit demand growth on a labour base already short of 30–40 per cent of its experienced staff and operating an expanded room stock at reduced staffing intensity. Absent accelerated workforce measures, the binding constraint on the national tourism strategy will migrate from marketing and visa policy where recent reforms have demonstrably succeeded, as the 196.9 per cent growth in Russian arrivals following short-stay visa exemptions illustrates to service delivery capacity. The reputational risk is specific: a destination that overtakes regional competitors in volume while its service quality indicators deteriorate converts a growth achievement into a positioning problem.

6. POLICY IMPLICATIONS

Five groups of measures follow from the analysis, ordered by their leverage on the identified gaps and specified with indicative targets so that implementation can be monitored (Table 8).

First, consolidate the standards architecture around the ASEAN reference. The ministries responsible for tourism and for education and vocational training should merge the national occupational skills standards and VTOS into a single national standards set explicitly mapped to the ACCSTP for the 32 MRA-TP job titles, complete the referencing of tourism occupations to VQF levels, and publish the mapping so that every credential carries a legible domestic and regional meaning. This is the highest-leverage measure because it is the precondition for the other four: certification, financing and curriculum reform all require a settled definition of competence.

Second, scale competency-based certification, prioritising recognition of prior learning. Assessment capacity should be extended from training institutions to workplace-based assessment, and recognition of prior learning should be offered systematically to the incumbent workforce. Section 5.2 established that this is where the largest addressable stock lies: with roughly 58 per cent of workers holding no recorded training, converting experienced incumbents into certified professionals addresses the gap at a fraction of the cost and time of pre-employment training. Certified professionals should be registered on the ATPRS as routine administrative practice rather than as an exceptional step.

Third, introduce industry co-financing. A modest training levy or matched-fund instrument for accommodation and travel enterprises above a size threshold refundable against verified training and certification expenditure would correct the poaching-driven under-investment that human capital theory predicts and that the Vietnamese evidence confirms, while giving employers standing to shape curricula. The design should exempt micro-enterprises, which dominate the sector numerically and lack administrative capacity.

Fourth, embed digital, language and sustainability competencies in the standards themselves. Property management systems, online distribution and channel management, service-sector applications of data analytics and artificial intelligence, operational foreign language proficiency, and the environmental management competencies associated with the sector's sustainability commitments should be specified as assessable units within the consolidated standards rather than left as institutional electives. Standards are the only instrument that reaches all 195 providers simultaneously.

Fifth, stabilise governance and measurement. The transfer of vocational education to the education ministry should be used to establish a standing tripartite tourism workforce council (state, industry associations, training providers) mandated to publish an annual tourism labour market report on a single definitional basis, replacing the current reliance on incompatible administrative and

association estimates. Section 4.2 showed that the existing indicators cannot be reconciled; no serious workforce policy can be evaluated on that foundation.

Table 8. Policy measures, instruments and indicative monitoring targets

Priority	Measure	Lead institution	Instrument	Indicative monitoring indicator
1	Consolidate standards around ACCSTP; complete VQF referencing	Culture-and-tourism ministry with education ministry	Ministerial circular; published mapping table	Single national standards set covering all 32 MRA-TP job titles; VQF levels assigned to all tourism occupations
2	Scale certification and recognition of prior learning	VTCTB with accredited assessment centres	Assessment accreditation scheme; RPL procedure	Number of workers certified per year; number of Vietnamese professionals registered on ATPRS
3	Industry co-financing of transferable training	Finance and tourism authorities	Training levy or matched fund, refundable against verified expenditure	Enterprise training expenditure as share of payroll; participation rate above size threshold
4	Embed digital, language and sustainability units in standards	Culture-and-tourism ministry; VTCTB	Revision of consolidated standards	Share of standards units with specified digital/language/environmental competencies
5	Tripartite workforce council and unified statistics	Education ministry with tourism authority and associations	Council charter; annual labour market report	Publication of an annual tourism labour market report on a single definitional basis

Source: Authors' proposal.

7. CONCLUSION

Vietnam enters the late 2020s with a tourism demand trajectory that has outrun its workforce system. The decade-length evidence assembled here shows international arrivals rising from 7.94 million in 2015 to a record 21.17 million in 2025 through a full cycle of expansion, collapse and recovery; an accommodation workforce of 502,759 in 2019, alongside a contemporaneous report that the wider workforce met about 80 per cent of need, falling below 400,000 by 2022 against an estimated 485,000 required at above 70 per cent occupancy and a projected requirement above 800,000 by 2025; a training system of 195 institutions producing about 20,000 graduates per year against an annual requirement of some 60,000, implying a cumulative unmet requirement of 360,000 to 432,000 workers over 2022–2030; a workforce of which roughly 23 per cent holds formal qualifications; and a standards architecture in which three partially overlapping systems coexist a decade after MRA-TP became fully operational, with VQF referencing incomplete and no published evidence of systematic ATPRS registration.

Read together, these findings support a single conclusion: the skills gap is not principally a shortfall of training effort but a failure of institutional coherence of the standards, certification, financing and governance arrangements that connect training to demand. The evidence for this reading is that the shortfall predated the pandemic and widened through the recovery even though training volume did not fall, while employers continued to retrain new hires irrespective of labour-market conditions, indicating that credentials do not carry information employers can use.

The MRA-TP framework, often discussed in Vietnam as an external compliance burden, is better read as the cheapest available instrument for repairing that coherence. It supplies negotiated standards, developed toolboxes, a certification template and a regional registration system whose domestication requires administrative consolidation more than new resources and regional peers have demonstrated that domestication succeeds when MRA-TP machinery is attached to existing high-volume training institutions rather than operated in parallel with them. Whether Vietnam uses it will substantially determine whether the record arrivals of 2025 mark the beginning of a quality-led growth phase or the point at which service delivery capacity became the binding constraint on the national tourism strategy.

The study's limitations follow from its documentary method. Workforce magnitudes rest on administrative and association estimates constructed on incompatible definitional bases rather than on survey microdata; firm-level training effort is unobserved; the flow accounting of Section 5.2 depends on a sector-entry parameter that is assumed rather than measured; and the national scope does not resolve regional variation in labour market tightness. Four research priorities follow. First, a representative employer skills survey for the accommodation and travel subsectors, which would replace the assumed entry rate with a measured one and permit direct estimation of the content gap. Second, tracer studies of tourism graduates to establish actual sector-entry and retention rates. Third, evaluation of certification outcomes for VTOS- and ACCSTP-referenced programmes, including wage returns to certification, which would test the signalling argument advanced here. Fourth, comparative analysis of MRA-TP domestication across ASEAN member states, which would establish whether the attachment strategy observed in the Philippines and Indonesia generalises.

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