Tourism Manpower and Training Needs Analysis

And

Tourism Human Resources Development Action Plan

(2011-2020)

FINAL REPORT
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“I reaffirm the necessity to give tourism a priority in the future development programme. This sector has great potential for growth and for making an effective contribution to economic diversification, since our dear country possesses such splendid tourist assets such as historic heritage, natural beauty, perfect environment, folklore and traditional industries. In addition, there is security, stability and the spirit of tolerance of the Omani citizens, thanks to God.

The tourism industry is well qualified to offer career opportunities to Omanis. It is well capable of serving the aims of regional development, since its benefits will cover all regions. On this basis, we should prepare a new strategy to develop this sector so it can stand on its own feet in a severely competitive, flexible and diversified international market.”

Excerpted from the speech of His Majesty Sultan Qaboos bin Said on the occasion of the 38th National Day
1. INTRODUCTION

1.1 Background to the Project

Tourism is an increasingly important sector of the national economy of Oman, currently accounting for 2.86 per cent of Gross Domestic Product. Recognising the importance of human resources development to the success and sustainability of the tourism sector, the Ministry of Tourism of Oman commissioned the World Tourism Organization (UNWTO) to review and assess human resources issues in the tourism sector. In 2006, UNWTO fielded a mission to Oman to evaluate the state of tourism human resources in the Sultanate, identifying the key issues and challenges in order to make recommendations for the further development of tourism human resources.

In the period of 2006-2009 the Sultanate of Oman continued with a phased expansion of tourism and the development of its tourism infrastructure. These developments altered the composition and needs of the tourism labour market and further planning in human resource development became necessary. In view of this, the Ministry of Tourism requested a follow-up mission in March 2009 to carry out a project formulation mission to advise the Ministry on further technical assistance needs for the preparation of a tourism labour market study. The main findings of the 2009 mission concluded that the Sultanate had reached a stage of tourism development where careful planning for tourism human resources development was needed to ensure the long-term success and sustainability of the tourism industry. Furthermore, it was recognised that appropriate tourism human resources development policies would assist the Sultanate in progressing the implementation of Omanisation Policy in the tourism sector and would also ensure that the employment creation effect of tourism development benefits and underpins the broader socio-economic development of Oman.

Based on the key outcomes and recommendations of the project formulation mission in March 2009, a UNWTO-Ministry of Tourism joint project was formulated for the preparation of a detailed Manpower and Training Needs Analysis and a phased medium term (2011-2020) Tourism Human Resource Development Action Plan for the Sultanate of Oman. Following the approval of the Ministry of Tourism, the project activities were launched in December 2009. As part of the first phase of the project, extensive fieldwork was conducted in the period of December 2009 - August 2010.

The project team consisted of the following experts:

Dr Edith M Szivas International Consultant, Project Team Leader
Dr Mohamed Al-Habsi National Consultant
Dr Masooma Al-Balushi National Consultant
Mr Ziyad Al-Dughaisi Tourism Statistician
Mr Saud Al-Suleimani Project Administrator

This Report contains the key outputs of the project. The Report is divided into two principal parts: Part 1 presents the main findings of the Manpower and Training Needs Analysis; Part 2 provides the Tourism Human Resource Development Action Plan for the period 2011-2020.
1.2 Key Project Objectives and Components

The main objectives of the project were:

- To undertake a comprehensive qualitative and quantitative analysis on the existing and future requirements in tourism human resources in Oman, through the collection of a robust empirical data framework upon (based on the areas indicated below) which future tourism human resource development policies can be based and future human resources demand can be met;
- To collect data on Omani employees working in the tourism sector, their distribution within tourism sub-sector, through the implementation of surveys;
- To identify existing skills shortages, as well as future demand for skills in the tourism sector taking into account the development of new tourism products and activities in Oman;
- To project future demand for employment in the tourism sector by tourism activity and job level for the period 2011-2020;
- To review the existing state of tourism education and training institutions in the country, including quality and depth of higher education and vocational training programmes, education and training resources, projecting future demand for skilled tourism human resources;
- To assist the Government meet future demand for skilled employees through undertaking an analysis of vocational and higher education institutions;
- To review current Omanisation targets for the tourism industry and provide recommendations for achieving future Omanisation targets;
- To recommend policies and strategies to increase the number of Omani managers in middle and senior management positions over the medium and long-term;
- To propose initiatives to facilitate and promote a continuous training culture in the tourism industry to address key skills gaps in order to strengthen the skills of the Omani tourism workforce; and
- Identify the main barriers to be overcome in relation to strengthening human resources development for the tourism sector in Oman, including issues such as perceptions and attitudes to working in the tourism industry, job retention, graduate recruitment and career development initiatives at all levels.

The project consisted of two principal components and these were:

1. Tourism Manpower and Training Needs Analysis

The Tourism Manpower and Training Needs Analysis presents the results of the national surveys that were conducted during the project period and analyse the key findings. This includes, *inter alia*, the employment of Omani employees and Omanisation policy issues; the existing and future levels of human resource demand and supply; and current and future training needs of the Omani tourism workforce. The Sultanate of Oman will have additional data and information which will allow the development of tourism human resources in a manner to support the Sultanate’s tourism development strategy, national development strategy and the successful implementation and development of the Omanisation Policy.
Data was collected through the collection and review of all available secondary data and through a set of primary data surveys.


The Medium-term Action Plan will provide an implementation strategy for the Ministry of Tourism to:

i. Implement effective tourism human resource development policies;
ii. Meet future tourism human resources demand;
iii. Achieve Omanisation Policy targets;
iv. Implement policies to ensure that Omani people benefit from tourism development; and
v. Develop an organisational framework for the implementation of tourism human resources development policies.

The Needs Analysis and the Medium-term Action Plan are closely linked together in that the Action Plan (2011-2020) is built from the main findings and results of the Tourism Manpower and Training Needs Analysis. This evidence-based Action Plan then provides an authoritative and actionable roadmap for the development of tourism human resources in the Sultanate of Oman for the period of 2011-2020.

1.3 Project Output

1.4 Intended Target Beneficiaries
The target beneficiaries of the project are all stakeholders involved in tourism industry development and management in the Sultanate of Oman.

The Ministry of Tourism and Government of Oman will be the primary beneficiaries of the project through:

- the availability of a comprehensive and robust data set regarding tourism human resource development and training needs in the Sultanate of Oman; and

The Omani people will benefit from the project through the policies and plans that will deliver:

- improved employment opportunities in the tourism industry;
- improved career opportunities, including enhanced opportunities to reach middle and senior management position in the industry;
- a strengthened human resources development culture;
- strengthened tourism education and training provision; and
- enhanced socio-economic benefits (direct and indirect) through tourism development.
Tourism enterprises in Oman will benefit through:
- an improved fit between tourism resources demand and supply;
- increased involvement on Omani people in tourism industry employment;
- increased motivation of Omani people to enter and stay in the industry; and
- better trained graduates.

Tourism education and training institutions will benefit through:
- increased demand for tourism education and training course;
- increased student motivation;
- increased training opportunities; and
- stronger links with tourism enterprises.

1.5 Key Outcome Indicators
The key outcome indicators for the project are the following:

- Improved tourism labour demand and supply match;
- Decreased skills gaps;
- Improved employee satisfaction;
- Strengthened tourism education and training provision;
- Improved image and attraction of the tourism sector employment by the Omani population;
- Increased level of Omanisation in the tourism sector;
- Increased numbers of Omanis in mid and senior level managerial positions; and
- Increased economic benefits from tourism to the Omani population without jeopardizing local customs and heritage.

1.6 Report Structure

Section 2 describes the methodology applied for the data collection for the Tourism Manpower and Training Needs Analysis.

Section 3 contains the first part (Part A) of the Tourism Manpower and Training Needs Analysis. The information presented here is primarily based on secondary information collected through consultations and desk research.

Section 4 contains the second part (Part B) of the Tourism Manpower and Training Needs Analysis which presents the analysis of the survey results for this project.

Section 5 contains the Action Plan for Tourism Human Resources Development (2011-2020) that was developed on the basis of the Tourism Manpower and Training Needs Analysis.
2. METHODOLOGY

2.1 The Methodological Approach

As described in Section 1.1, in March 2009, a project formulation mission was conducted by UNWTO to assess tourism human resources development issues and the scope and scale of development needs. During the preparatory project formulation mission interviews were conducted with senior government officials at the Ministry of Tourism and Ministry of National Economy, as well as with a sample of Tourism Education and Training Institutes and industry Company Directors and HR Managers. Parallel to this, qualitative desk research was also conducted to assess data availability, including tourism industry and tourism labour market statistics and other tourism labour market indicators. To this end, meetings were also conducted with the officials at Ministry of Tourism and Ministry of National Economy to establish and assess data availability and survey methodologies used by these Government Agencies.

Survey methodologies used by the Ministry of Tourism and Ministry of National Economy were examined for their applicability to the project. It was found that both Ministries routinely survey tourism firms through questionnaire surveys and these surveys tend to have a high response rate for the accommodation sector but not for the non-hotel part of the tourism sector (such as restaurants, travel agencies, etc.). It was also identified that there was no up-to-date database of tourism firms for the non-hotel sector and that such a database had to be created before the large scale questionnaire survey for this project could be conducted. The possibility of using an electronic survey was discussed with experts at both the Ministry of Tourism and Ministry of National Economy and given the concerns raised in terms of the novelty of such an approach and the untested quality of the data it would produce, this approach was not adopted for this project. Based on previous experience, the decision was made to use standard Ministry of Tourism survey distribution channels for this survey.

The assessment of data availability was also important to avoid unnecessary duplication of data collection efforts whilst ensuring that all available and accessible data was collected and reviewed in the course of the project. The detailed discussions with experts at the Ministry of Tourism and Ministry of National Economy confirmed the relative paucity of tourism labour market statistics, particularly for the non-accommodation part of the tourism industry.

Given the weakness of available information and statistical data on the tourism labour market, it was decided that the project objectives could only be met through extensive primary survey work. In order to collect the qualitative and quantitative information needed for the preparation of the Action Plan, a total of six separate surveys were devised and implemented corresponding to specific industry stakeholders. The surveys included two large scale questionnaire surveys and four interview surveys. The questionnaires and interview protocols were designed by the UNWTO project team in close consultation with the Ministry of Tourism. The questionnaires and interview protocols were first tested during the early field missions and the final versions were submitted for approval to the Ministry of Tourism.
2.2 Definition of Tourism Employment for the Project
For the definition of tourism employment and tourism firms, the project followed the methodology of the UNWTO Tourism Satellite Account (TSA) system and its classification of tourism sectors for employment purposes. The classification of tourism employment adopted for this project included tourism businesses and activities in the following tourism sectors:

1. Accommodation for visitors
2. Food and beverage serving industry
3. Tourist Transport
4. Transport equipment rental
5. Travel agencies and other reservation services
6. Cultural industry
7. Sports and recreational industry
8. Retail trade of country-specific tourism
9. Other country-specific tourism industries
10. Miscellaneous tourism services

2.3 Geographical Coverage of the Surveys

2.4 Omanisation Policy
Given the importance of the Omanisation policy to the economic and social development of the Sultanate of Oman and its relevance to the project, Omanisation was treated as a cross-cutting issue across the entire range of issues that were addressed during the project and was reviewed and discussed through both the evidence from policy documents and the primary surveys conducted for this project.
Project Surveys

Section 2.5 outlines the methodology used for the six primary surveys that were conducted for the Manpower and Training Needs Analysis. The surveys were run simultaneously in the period of January-August 2010. The survey methodologies will be described chronologically in line with the findings that are presented in Section 4 of the report.

SURVEY 1 TOURISM FIRMS QUESTIONNAIRE SURVEY

Survey 1 was a large-scale questionnaire survey of all tourism sector firms in the Sultanate of Oman. This included the full spectrum of tourism sector firms, ranging from hotels, restaurants, travel agencies and tour operators, tourist attractions, sports and recreational facilities. The list of the tourism sectors included in the surveys is provided in Section 2.2.

Given the difference in organizational structure (such as the differences in departmental structure and job titles) between the accommodation sector and the non-accommodation part of the tourism sector, two versions of the questionnaire were prepared, one for the accommodation sector and another for non-hotel tourism businesses (such as tourist restaurants, tour operators/travel agencies, airlines, cultural attractions, sport and recreation facilities). The questions in the two versions were kept as similar as possible in order to allow for data aggregation at the analysis stage.

The principal objectives of the survey were to collect data regarding the composition and structure of the tourism labour market, such as the number of Omani/non-Omani employees in tourism and its sub-sectors, to assess the proportion of employees in managerial and supervisory positions, to estimate the gender distribution of tourism employees. A key task of the survey was to collect information on skills availability and skills gaps in the industry. Furthermore, the survey collected information on human resource issues and practices such as recruitment methods and difficulties, staff turnover and training provision. Omanisation was treated as a cross-cutting issue and data was collected on a number of key areas in relation to this policy. More specifically, the survey collected data on the distribution of Omani employees in managerial, supervisory and operative jobs, compared recruitment methods and difficulties for Omani and non-Omani employees, assessed satisfaction by managers with Omani employees, examined the extent of training provision for Omani employees, evaluated and compared skills shortages for Omani and non-Omani employees and asked managers/owners how they viewed the minimum salaries set for Omani employees by the Government in the context of the Omanisation Policy.

The questionnaire was distributed to all tourism firms in the Sultanate via the Regional Representations of the Ministry of Tourism and the completed questionnaires were returned back via the regional Representations to the Ministry of Tourism and the project team. In order to achieve the required response rate, chases via telephone and personal visits were put in place. The questionnaires were sent to the attention of the HR Director or in his/her absence, to the General Manager of tourism firms. Company details were registered. This was intended to ensure data accuracy and appropriate response rate.

The size of the population of tourism firms was not readily available at the time of the survey design. For the purposes of sample size calculation and for the questionnaire
distribution, the project team had to develop a comprehensive and up-to-date database of all tourism firms in the Sultanate. A detailed description of process of compilation of the tourism firms database is provided in Section 2.6.

The questionnaires were developed in consultation with the Ministry of Tourism and the final version was approved by the Ministry.

In total, the questionnaire was distributed to 625 tourism firms and after data cleaning 289 questionnaires were included in the analysis. This corresponds to a response rate of 46.25 per cent (±4.23 margin of error). As anticipated, the response rate for the accommodation sector was higher, with 228 of the distributed questionnaires 154 useable returns and corresponding to 67.5 per cent response rate. Of the 27 four and five star hotels, 23 responded, resulting in a response rate of 85 per cent for that sub-sector. The two versions of the questionnaire (hotels and non-hotel firms) were analysed together, with differences pointed out as appropriate. The data was analysed quantitatively, using Mircosoft Excel, Access and SPSS programmes.

**SURVEY 2 INTERVIEW SURVEY OF HUMAN RESOURCE (HR) DIRECTORS AND DIRECTORS**

Survey 2 was an extensive interview survey with tourism HR Directors/ or firm General Managers (GMs)/Directors to compliment the firm level questionnaire survey with detailed qualitative information. As human resource managers are positioned at the interface between government legislation, the labour market and the needs of businesses, their role and opinions are crucial to policy implementation.

The project team conducted forty structured in-depth interviews with a sample of human resource managers/directors of tourism sector firms. At each firm, the interview was conducted with the top decision maker in the human resource area; in their absence the most senior executive was interviewed. The survey included hotels, restaurants, travel agencies and tourism attractions in Muscat and six other regions and governorates. The nature of the interviews was semi-structured with the interviewer guiding the interviewee around a number of major topic areas.

The objective of the survey was to examine the views of HR Managers regarding key tourism labour market and human resource management issues. The interviews were structured around four specific objectives. Firstly, the aim was to ascertain the nature of HRM policies and practices in current use in the Sultanate, such as recruitment methods and issues, promotion, skills availability and shortages, training provision, salaries and views on tourism education and training provision; secondly the aim was to examine the attitudes of HR Managers to the Omanisation policy; thirdly to ascertain opinions on the realism of the official targets; and fourthly, to identify the barriers and opportunities to the implementation of the policy. The questioning strategy was built around these four objectives. The interview protocol was developed in close consultation with the Ministry of Tourism which approved the final version. Firm selection was also conducted in close consultation with the Ministry of Tourism.
SURVEY 3  QUESTIONNAIRE SURVEY OF TOURISM SECTOR EMPLOYEES

Survey 3 was a large scale questionnaire survey targeted at tourism sector employees. Companies were selected to include a wide spectrum of tourism firms, ranging from hotels, restaurants to travel agencies and tourist attractions. The survey included the whole spectrum of tourism businesses in terms of size - from large multinational hotels and to small independently owned travel agencies. The project team distributed the questionnaires at selected tourism sector firms and the completed questionnaires were either collected by the team on the same day or were sent back to the project office at the Ministry of Tourism. The survey collected information from both Omani and non-Omani employees. The questionnaires were designed as self-completed questionnaires and the survey was anonymous to encourage respondents to disclose information that might be viewed as sensitive by them (such as salaries).

The main objective of the survey was to gather the views of tourism employees regarding their career history and plans, motives for taking up tourism employment and the level of satisfaction with working in the tourism sector. The survey also examined the extent of family support for tourism sector employment and explored current tourism sector employees’ propensity to stay/leave the sector. An important objective of the survey was the collection of sample salaries in tourism in order to supplement the scarcely available secondary data on tourism industry salaries.

In total, the achieved sample size \((n)\) was 292, with 74 per cent of the respondents being male. 44.5 per cent of the sample data was collected from Muscat, the rest of the responses coming from the other six regions and governorates. 38 per cent of respondents were Omani nationals. This corresponds well with the overall profile of employment in the tourism sector. The data was analysed quantitatively using Microsoft Excel, Access and SPSS software.

SURVEY 4  FOCUS GROUPS WITH OMANI POPULATION AND STUDENTS IN TOURISM EDUCATION INSTITUTIONS

Survey 4 included a series of focus group meetings with Omani adult male and female groups and with Omani students studying tourism related programmes in higher education institutions. The groups were recruited with the help of the Ministry of Tourism. Subject were recruited on a voluntary basis and the anonymity of respondents was guaranteed.

The main objective of the survey was to obtain first hand information regarding the Omani population’s views of tourism as an economic sector and tourism as an employer. Student groups were probed about their knowledge of tourism industry and careers, their attitudes towards taking up jobs in the tourism sector and about their overall career objectives and plans. The project team conducted focus group meetings in Muscat and in the Batinah and Musandam regions. Regions were selected based on their current share from tourism development and on the basis of the feasibility of conducting the focus group meetings. Focus group meetings were conducted with the following groups:

- Musandam Men’s Group
- Musandam Women’s Group
- Batinah Women’s Group
• Students at Oman Tourism College, Muscat
• Students at Sultan Qaboos University, Muscat

SURVEY 5 INTERVIEW SURVEY OF TOURISM EDUCATION AND TRAINING PROVIDERS

Survey 5 was an interview survey of tourism education and training providers. The semi-structured in-depth interviews were conducted with Directors and senior academic faculty members of tourism education and training institutions. The interviews were structured around five key topic areas. Firstly, the interviews collected information on the current provision of tourism programmes and the types and levels of qualifications awarded. Secondly, data was collected regarding the current and planned future student numbers in order to assess both education capacity and capacity utilization. Thirdly and relatedly, the ease and difficulty in relation to student recruitment and the fees charged were explored. Fourthly, the interviews explored the links and cooperation between the educational institutions and the tourism industry. Fifth, institution affiliation and academic cooperation were also explored. Finally, information on student employability and its monitoring was discussed.

Interviews were conducted with six of the eight education and training institutions currently providing tourism related programmes in Oman. Two institutions, the Colleagues of Higher Education and Khimji College could not be interviewed due to a technical difficulty in scheduling the interviews. Interviews were conducted with the following Institutions:

• Sultan Qaboos University
• Oman Tourism College
• GuTech University
• National Hospitality Institute
• Gulf College
• Majan College

These institutions provide courses at degree, diploma and certificate level and also run short training programmes. Sultan Qaboos University, the Colleagues of Higher Education, Oman Tourism College, GuTech University, Gulf College and Majan College provide Bachelor of Arts degree qualifications, the National Hospitality Institute (NHI) provides vocational training. Oman Tourism College is the only institution in the Sultanate provides both university level educational courses and vocational training programmes.

The interviews were conducted with the Director/Principal of each institution and the sector displayed a high level of cooperation with the survey.
SURVEY 6 INTERVIEW SURVEY OF INTEGRATED TOURISM COMPLEXES (ITCs)

Survey 6 was an interview survey with a sample of ITCs. The selection criteria for selecting ITCs was based on the need to collect information from ITCs that have already started their operations in the Sultanate and have, therefore, some experience with staff recruitment and have knowledge and experience regarding tourism labour market issues in the country. The selection of ITCs was conducted in close collaboration with the Ministry of Tourism.

The main objective of the survey was to collect information regarding the ITCs employment creation plans, current and future human resource recruitment plans and their involvement in training provision.

The Interviews were conducted with the Chief Executive Officer or equivalent and/or HR Managers of the ITCs. In total, interviews were conducted with the following four companies:

- The Wave Project
- Orascom Muriya
- Muscat Hills
- Yiti Project

Blue City was also approached by the project team but company representatives were not available for the interview.

2.6 Tourism Firms Database

Surveys 1, 2 and 3 were based on an inventory of all registered and operating tourism businesses. Such an inventory had to be comprehensive, containing all sub-sectors of the tourism industry, up-to-date and had to contain sufficient information on the companies for both classification purposes and for contact. As no such inventory was readily available in the Sultanate, the database was compiled by the project team. The database was built from existing lists of registered firms from the Ministry of Tourism and Ministry of Transportation and Communications. The lists obtained from the Departments were in varying formats (printed, Excel and Word files) and the information needed thorough checking and updating. Companies were contacted via the telephone for confirming their operation and contact details. Companies that ceased to exist were removed from the lists and new companies were added. Additional companies were identified and added to the database based through internet and telephone directory searches. The tourism firm database built for the project includes all known and operating tourism business in the Sultanate.
The classification of tourism sectors in the database follows the system of UNWTO Tourism Satellite Account which includes the following tourism sectors:

1. Tourist Accommodation
2. Travel agencies, Tour Operators & other reservation services Industry
3. Food & Beverage Service Industry Firms
4. Tourist Transportation Modes Firms
5. Sports & Recreational Firms
6. Tour Guides
7. Cultural Industry Firms
8. Tourist equipment rental firms
9. Retail trade of country specific products firms
10. Other country-specific tourism characteristic goods
11. List of Miscellaneous tourism services firms

The database was built in a searchable Microsoft Excel format. Each firm in the database is listed with the following information:

- Name of Firm
- Type of Firm
- Classification (for accommodation sector)
- Location (Region / Governorate)
- Specific Location (Willayah, City, etc)
- Head Office & Branches Locations.
- Firm Address (Tel, Fax, Postal Code/ P.O. box, Email)
- Ministry of Tourism license

The database contains data on 625 tourism sector firms. Of these, 228 are hotels and other accommodation providers, 397 are companies operating in the non-accommodation part of the tourism sector.

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<td>3 Restaurant</td>
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<td>4 Dive Centre</td>
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<td>5 Car Hire Company</td>
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<td>6 Airline</td>
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<td>7 Museum/Tourist Attraction</td>
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<td>10 Other Type</td>
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*Table 2.1 Tourism Firms Database*
3. SITUATION ANALYSIS: TOURISM MANPOWER AND TRAINING NEEDS ANALYSIS
PART A

3.1 Introduction
The situational analysis of tourism manpower and training needs is in two parts. Part A is presented in Section 3 and the information presented here is based upon desk research and information obtained from Government sources during interviews with senior officials within the Ministry of Tourism, Ministry of National Economy, Ministry of Manpower and Ministry of Higher Education. Desk research was undertaken in order to gather data from Government sources, academic sources and from international organisations such as UNWTO, ILO and the World Bank in order to provide a comprehensive overview of the current state of tourism human resources and tourism labour market in the Sultanate of Oman. It must be pointed out that the availability of information was limited at times in some areas and often not readily available. Notwithstanding, this section here provides a full and comprehensive situational analysis of the current state of tourism human resources in the Sultanate of Oman.

Part B of the Manpower and Training Needs Analysis will be presented in Section 4 of the Report where information gathered from the six primary surveys conducted for the purposes of this project will be presented and analysed.

The Tourism Manpower and Training Needs Analysis examines the current state of tourism human resources in Oman and highlights the key issues for tourism human resource development for the next decade. The findings of the Tourism Manpower and Training Needs Analysis form the basis of the National Tourism Human Resources Development Action Plan (2011-2020). The Action Plan will be presented in Section 5 of the Report.

3.2 Historical Overview of Tourism Development in Oman
Oman is a relative newcomer to international tourism and tourism has been initiated with the long term plan to diversify the economy and reduce the country’s dependency on oil (Ministry of Development, 1996). After the coup of July 1970, the institution of government was created quickly in Oman (Townsend, 1977; Skeet, 1992). In August 1970, his Majesty Sultan Qaboos unified the country by abolishing the title Sultanate of Muscat and Oman and replacing it with the Sultanate of Oman. This new name reflected the urgency in attaining social cohesion and national unity. As a developing country, the government initiated several development projects that brought rapid material and social change, made possible by increasing oil revenues (Ministry of Development, 1981). Later on, and with the help and support of many countries in the Arab World, Asia, Europe, and the international organisations, the Government established an economic and social strategy in a five year development plan, which was approved by the Development Council¹ in November 1975.

In the first five-year development plan (1975-1981), an increase in oil prices enabled the country to establish a basic infrastructure in the capital and other main cities, such as

¹ The Development Council was cancelled by the Royal Decree (6/96) issued on 10 of January 1996. All its responsibilities transferred to the Council of Minister.
Salalah, Sohar, Nizwa and Sur. In the second five-year plan (1981-85) government spending grew by about 28% (Meed, 1973, Ministry of Development, 1981, and Whelan, 1987). The increase was to accommodate higher costs, extra projects and investments that focused mainly on building the infrastructure and providing the main services for local industry, agriculture, fisheries and water resources.

Government involvement and intervention (Gilbert, 1990; Pearce, 1992; Al habsi, 2004) in tourism in Oman has been evident since 1973 when His Majesty Sultan Qaboos appointed His Highness Fahad bin Mahmoud as the “Minister of Information and Tourism” (Al Jareedah Al Rasmiyah², 1973). “On December 8, 1974, the Ministry’s name changed to the “Ministry of Information and Culture” (Al Jareedah Al Rasmiyah, 1973: 322). Later the Ministry of Information and Culture split into two separate ministries (Ministry of Heritage and Culture, and Ministry of Information) and, in July 1974, the development of tourism became part of the remit of the Ministry of Commerce and Industry (Al Jareedah Al Rasmiyah, 1974:66). It was only late in 1989 when the tourism authority was upgraded to the Directorate General of Tourism (Al Jareedah Al Rasmiyah, 1990:185). By late 1993, the Directorate General of Tourism was headed by an under-secretary of tourism and, since then, change in tourism became valued and received government attention as a priority area to be developed and supported domestically and internationally (Al Jareedah Al Rasmiyah, 1994: 61)” (Al Habsi, 2004:53). Upgrading the tourism authority also got the attention of the local and regional media; it influenced the movement of local and regional investments towards tourism in Oman; and gave the tourism authorities more power and presence within government institutions.

**Tourism and the national economy diversification**

In order to diversify the economy and to reduce the dependence on oil exports, Oman has decided to develop tourism on a very controlled basis. The focus of tourism is on the country’s cultural and environmental attractions. The attitude towards tourism development is a cautious one (WTO and UNDP, 1991). “Government investment in tourism development varied from one five-year development plan to another and it was influenced by the price of oil and market stability” (Al Habsi, 2004: 62). During the first and second five-year development plans, tourism as a commercial sector was still not valued due to its infancy stage (Burns, 1996). Official attitudes towards tourism were not clear when compared with other sectors e.g. industry or agriculture. In the first five-year development plan, only 10.5 million Omani Rials were allocated to tourism (Ministry of Development, 1976:30). This amount was dedicated to building accommodation facilities for government visitors and some businessmen/women in the country. In the second five-year development plan, the amount allocated to the commerce and tourism sector was 69.5³ million Omani Rials (Ministry of Development, 1981:51).

In the third five-year development plan (1985-1990), the budget allocated for commerce and tourism was 76.3 million Omani Rials. As a result of the oil crises in the mid 80s, the government was concerned with diversifying its national economy in the long term and the dependency on oil consequently decreased from one five-year development to another (O’Reilly, M. 1998). Consequently, tourism became more valued and received more attention in the third five-year development plan and beyond. These concerns were clarified in three different areas. The first was by upgrading the tourism authority to a
directorate general of tourism with more responsibilities and roles. Second, the
government introduced new legislation on tourist regulations and visas (ROP, 2000).
After 1987, a 'non obligation certificate' was no longer required by tourists visiting Oman;
instead, they could apply individually or in a group to obtain a visitor's visa from any
Omani Embassy, Consulate or trade office or airline company. Any local tour operator or
hotelier could submit a tourist visa form directly to the immigration office in Muscat. In the
fourth five-year development plan, 1991–1995, the situation had changed and the
government realised (with some concern about the impact of tourism on local society
and culture) the importance of tourism in diversifying the national economy. During the
fourth plan, 1991-1995, two important issues regarding tourism occurred. The first was
the preparation of the first comprehensive tourism plan in the country, which was done in
1991 by WTO\(^4\) and UNDP\(^5\) teams after three years of work. The second was the granting
of more flexibility regarding visa regulations e.g. providing free access for the nationals
of Gulf co-operation council countries.

The vision to diversify the national economy was the centrepiece of the 'Oman 2020'
conference, organised in Muscat in 1995. To diversify the Omani economy, the 'tourism
sector' was one of the main sectors identified by many speakers from Asia, Europe,
Latin America, the Middle East, the World Bank and the World Tourism Organisation.
Key priorities for action included marketing the country's outstanding tourism assets and
further developing eco-tourism. A tourism investment study was flagged as a priority
area that would serve as a model for private sector participation in the integrated
development of tourism resources (World Bank, 1995). Many activities that occurred in
Oman reflected the government's enthusiasm in developing tourism and increasing its
contribution to the national economy.

After establishing Ministry of Tourism in 2004, government maintained its strategies and
tourism sector has received considerable policy focus in the recent years (Al Habsi,
2004). The Sixth Five Development Plan (2006-2010) had set an annual growth target of
6.1 per cent in the tourism sector. The actual average annual growth was much higher at
9.9 per cent during the same period.

The Seventh Five Development Year Plan (2006-2010) retains the priority focus on
tourism with aims to derive 3 per cent of GDP from the tourism sector and a planned
annual growth target of 7 per cent and proposed investment of RO 777 millions, of which
RO 214 millions would come from the public sector and RO 563 millions from the private
sector. During the first three years of the Seventh Plan period, hotels and restaurants
grew at an annual average rate of 27.6 per cent. Later announced figures confirmed
that tourism on GDP reached 2.6 per cent in 2009 (Al Roya, 2010). In an interview with
Al Roya local newspapers Undersecretary of Nation Economy confirmed that Oman is
well on track to meet the 2020 goals and the sector currently contributes about 2.1 per
cent of GDP (Al Roya, 2010).

To increase revenues and limit the effects of mass tourism on traditional culture, the
Sultanate is targeting the luxury tourism segment. To this end, golf courses, high-end
marinas, and an international-standard stadium for concerts and sports games are either
in the works or already built. Integrated tourism complexes (ITCs) – mixes of holiday
villas, hotels, resorts and shopping centres – are some of the biggest projects under way in the Sultanate today and are expected to become the lynchpins in future development. But the global financial crisis prompted Oman to slightly re-think its vision for the tourism sector and the coming year should provide more clarity on the future of its projects. Unlike other major tourism players in the region, such as Dubai, Oman has opted for a more subtle style of development to avoid over-building. At the same time, it is seeking to increase capacity to meet its stated development goals, with hotel additions and airline expansions under way to meet expected demand.

Tourism is currently seen as one of the important industries in the country with potential for employment creation. The economic benefits generated by tourism have encouraged the government to consider tourism as a sector of strategic importance. The sector's ability to create employment complements the government's commitment to increase the number of Omanis working in different sectors.

3.3 Tourism Development in Oman

International Tourist Arrivals

According to data from the Oman Tourism Satellite Account (2009), in 2009 the tourism sector’s contribution to GDP was estimated at 2.86 per cent. This represents a 14 per cent increase from the corresponding 2005 figure and shows sustained growth against the background of the global economic slowdown.

According to Ministry of Tourism data (2010), in 2009, 1,586,979 international tourist arrivals were recorded in the Sultanate. This represents a decline of 1.7 per cent from 2008 figures. The year of 2008, on the other hand, saw a high growth (18.8 per cent) in international tourist arrivals to the country. Another high growth year was 2006 when arrival numbers showed a 25.8 per cent increase. Table 3.1 below shows the trends in international tourist arrivals to Oman for the 2005-2009 period.

<table>
<thead>
<tr>
<th>Year</th>
<th>International Arrivals (Numbers)</th>
<th>Change on Previous Year (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2005</td>
<td>1,101,382</td>
<td>-</td>
</tr>
<tr>
<td>2006</td>
<td>1,385,007</td>
<td>25.8</td>
</tr>
<tr>
<td>2007</td>
<td>1,359,509</td>
<td>-1.8</td>
</tr>
<tr>
<td>2008</td>
<td>1,614,703</td>
<td>18.8</td>
</tr>
<tr>
<td>2009</td>
<td>1,586,979</td>
<td>-1.7</td>
</tr>
</tbody>
</table>

Table 3.1 International Tourist Arrivals to Oman, 2005-2009

Source: Ministry of Tourism, Oman 2010

As seen from Table 3.1, although the global economic crisis slowed down international tourism arrivals, the annual growth figures are well above the global growth figures and show a rapid expansion of tourism activity in the Sultanate in the period. The years of 2007 and 2009 saw a decrease of international tourist arrivals but the high growth figures of 2006 and 2008 compensate for this and result is that in the 5 year period from 2005-2009, international tourist arrivals grew by 44 per cent. This is considerable growth against the background of a global economic crisis.

When looking at the composition of the tourism demand to Oman, the data reveals that incoming tourism is dominated by tourism from the GCC countries and other Arab
counties. Ministry of Tourism data for 2009 shows that of all international tourist arrivals 53 per cent were from GCC countries, 17 per cent from Europe, 15.7 per cent from Asia, 4.8 per cent from other Arab countries and 6.2 per cent from other countries. With an overall share of 57.8 per cent of all international tourist arrivals, this data shows a heavy dominance of tourism from GCC and other Arab states (Ministry of Tourism, 2010). One implication of this for tourism human resource development is the relative cultural proximity between the host population and the visiting tourists and this ameliorates to some extent the socio-cultural impacts of tourism in the Sultanate. Another implication is the need for Arabic language skills in the hotels and at tourist attractions.

**Tourist Expenditure**

According to Ministry of Tourism data, in 2009 the total expenditure by international tourists in Oman was estimated at OMR 144,209,000. This figure is -19.3 per cent below the corresponding 2008 figure. Prior to this, expenditure by international tourists showed strong growth, with a 6.6 per cent increase in 2008, 14.1 per cent increase in 2007 and 15.1 per cent increase in 2006 (Tourism Satellite Account data, Ministry of Tourism, 2010).

Domestic tourism expenditure showed even higher growth in the pre-2009 period, with a 40 per cent growth recorded for 2008, 23.1 per cent increase in 2007 and 23.2 per cent growth in 2006 (Tourism Satellite Account data, Ministry of Tourism, 2010). These figures indicate an overall dynamic expansion and growth of the sector that exceeds global average growth of tourism activity. The figures also show that the global economic crisis did impact on the Omani tourism industry but the impacts were moderate compared to most other countries.
Regional Tourism Development

The Sultanate of Oman is governed through the following 9 regions and governorates: (1) Muscat, (2) Al Batinah, (3) Al Buraimi, (4) A'Sharqiyah, (5) Al Wusta, (6) Dhahirah, (7) Dhakliyah, (8) Dhofar and (9) Musandam. Based on the current share from tourism accommodation supply (rooms), tourism is currently concentrated in four regions: Muscat, Dhofar, A'Sharqiyah and Al Batinah. According to Ministry of Tourism (2009) data, the share of regions from total hotel rooms and guest nights in the Sultanate in 2009 was as follows (See Table 3.2).

<table>
<thead>
<tr>
<th>Region</th>
<th>Share from Hotel Supply (%)</th>
<th>Share from Total Number of Rooms (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Muscat</td>
<td>44</td>
<td>60</td>
</tr>
<tr>
<td>Dhofar</td>
<td>14</td>
<td>14</td>
</tr>
<tr>
<td>A'Sharqiyah</td>
<td>11</td>
<td>6</td>
</tr>
<tr>
<td>Batinah</td>
<td>9</td>
<td>8</td>
</tr>
<tr>
<td>Dhakliyah</td>
<td>8</td>
<td>4</td>
</tr>
<tr>
<td>Al Buraimi</td>
<td>8</td>
<td>4</td>
</tr>
<tr>
<td>Musandam</td>
<td>3</td>
<td>3</td>
</tr>
<tr>
<td>Dhahirah</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Al Wusta</td>
<td>3</td>
<td>1</td>
</tr>
</tbody>
</table>

Table 3.2  Distribution of Hotel Supply by Regions, 2009
Source: Ministry of Tourism, GIS Maps, 2009

Table 3.2 shows that Muscat has the highest share from the accommodation supply and that its share is particularly high when measuring it on the basis of room supply (60 per cent). Dhofar is currently the second most touristic region, accounting for 14 per cent of both hotel and room supply. A'Sharqiyah and Batinah regions have an 11 and 9 per cent share from hotel supply and 9 and 8 per cent share, respectively, from the total number of hotel rooms. Dhakliyah and Al Buraimi have the same share, 8 per cent of hotels and 4 per cent hotel rooms from the total accommodation supply. Musandam, Dhahirah and Al Wusta currently have fairly low share from the tourism accommodation supply.

Accommodation sector

According to Ministry of Tourism data (2010), in 2009 there were 219 hotels and 10,409 hotel rooms in the Sultanate. In 2006 there were 173 hotels with 8,563 rooms operating in Oman, in 2007 190 hotels with 9,298 rooms, in 2008 there were 196 hotels with 9,318 rooms. In other words, within one year from 2008 to 2009, 23 hotels opened in the Sultanate and 1,091 rooms were added to the accommodation supply. In terms of room capacity expansion, this represents at 12 per cent growth from 2008 to 2009. In the period of 2006 to 2009, a total of 46 new hotels and 1,846 rooms were added to the Sultanate’s accommodation supply. This represents a robust growth and has major implications for tourism human resources management and development.
In 2009, the average occupancy rate at the hotels was 49 reported to be per cent. The highest occupancy rates were recorded at the 4-star hotels (56.9 per cent), non-classified accommodation (55.4 per cent), 5-star hotels 52.3 per cent and 3-star hotels (52.2 per cent). In terms of the regions, hotels in Muscat enjoyed the highest level of year-round occupancy rate (53.6 per cent), followed by Dhofar (47.8 per cent), Musandam (45.1 per cent), Batinah (43.6 per cent) and Dhakliyah (42.2 per cent). The lowest levels of occupancy rates were reported in Al-Wusta (21.6 per cent), Sharqiyah (29.2 per cent), Dahira (29.9 per cent) and Buraimi (36.2 per cent).

3.4 Population and Labour Market
According to data from the Ministry of National Economy, in 2008 the population of Oman was reported to be 2.867 million. In the same year, the Omani population was reported to be 1.967 million while there were 900,000 expatriates in the Sultanate. According to these figures, the some 69 per cent of the population is Omani, 31 per cent expatriate.

Oman is characterized by a relatively small labour market. According to data from the International Labour Organization (ILO), in 2008 the economically active population of Oman was 1.05 million. According to statistics from the Ministry of National Economy, the total number of people employed in the public sector employed in 2008 was 154,000, of which 131,209 were Omani nationals. According to data from the Oman Ministry of National Economy, in the same year the private sector employed, 942,000 employees, of whom 795,000 were expatriates and 147,194 Omanis were registered with the public authority for Social Insurance.

The working age population is relatively young. ILO reports that in 2008 20 per cent of the population was in the 15-24 year age group and 31 per cent of the population was between the ages of 15 and 29. When looking at the economically active population, 40 per cent of the economically active population is in the 15-29 age group. This implies a relatively sizeable young population that could form the future supply of human resources to the tourism sector if they are attracted to tourism sector employment and if those employment opportunities are accessible to them. Data on unemployment is not officially available, neither from the Ministry of National Economy nor through the ILO.

3.5 The Dimensions of the Tourism Labour Market
There is currently no official single figure on the size of the tourism labour market in Oman. Estimates vary amongst the Government agencies depending on the classification used for the estimation. The Ministry of Manpower classifies tourism as comprising five sub-sectors: (1) Accommodation, (2) restaurants, (3) travel agencies and tour operators, (4) car rental companies and (5) airlines. It must be pointed out here that this classification is principally used for the setting and monitoring of Omanisation targets for the tourism sector. The system includes a total of 158 tourism firms, of which 52 are hotels, 38 restaurants, 55 travel agencies and tour operators, 8 car rental companies and 5 airline offices. The Ministry of Tourism is also currently following this categorisation. The Ministry of National Economy (2008/2009), included information only for hotels and restaurants in its report on employment and salary. The Ministry of National Economy figures are based on information from 101 hotels and 219 restaurants.
Table 3.3 contains the two estimations of the tourism labour market. The data provided in Table 3.3 refers to different years and is, therefore, not fully comparable but it does illustrate the differences in classification approaches and the differing estimates.

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotels</td>
<td>7,741</td>
<td>6,409</td>
</tr>
<tr>
<td>Restaurants</td>
<td>10,467</td>
<td>1,866</td>
</tr>
<tr>
<td>Travel agencies and tour operators</td>
<td>-</td>
<td>1,554</td>
</tr>
<tr>
<td>Car rental</td>
<td>-</td>
<td>608</td>
</tr>
<tr>
<td>Airlines</td>
<td>-</td>
<td>4,863</td>
</tr>
<tr>
<td>TOTAL</td>
<td>18,208</td>
<td>15,300</td>
</tr>
</tbody>
</table>

Table 3.3  Size of Tourism Labour Market from Current Estimates
Sources: Ministry of Manpower 2010/05/01
Ministry of National Economy 2008/2009

Hotel Sector Employment
Official data on employment is available for the hotel sector. According to Ministry of Tourism data (2010), in 2009 there were a total of 7,973 employees working in the accommodation sector (including 1-5 star hotels and non-classified accommodation). Of this, 3,557 were Omani nationals and 4,416 non-Omani nationals. This data indicates that 44.6 per cent of employees in the hotel sector were Omani nationals. Table 3.4 shows a detailed picture of hotel sector employment for the year of 2009.

<table>
<thead>
<tr>
<th>Category</th>
<th>Employees (Total Number)</th>
<th>Of which Omani</th>
<th>Of which Non-Omani</th>
<th>Level of Omanisation**</th>
</tr>
</thead>
<tbody>
<tr>
<td>5 star</td>
<td>4,012</td>
<td>1,818</td>
<td>2,194</td>
<td>45.30</td>
</tr>
<tr>
<td>4 star</td>
<td>1,827</td>
<td>903</td>
<td>924</td>
<td>49.43</td>
</tr>
<tr>
<td>3 star</td>
<td>865</td>
<td>334</td>
<td>531</td>
<td>38.61</td>
</tr>
<tr>
<td>2 star</td>
<td>550</td>
<td>210</td>
<td>340</td>
<td>38.18</td>
</tr>
<tr>
<td>1 star</td>
<td>478</td>
<td>183</td>
<td>295</td>
<td>38.28</td>
</tr>
<tr>
<td>Non Classified*</td>
<td>241</td>
<td>109</td>
<td>132</td>
<td>45.23</td>
</tr>
<tr>
<td>TOTAL</td>
<td>7,973</td>
<td>3,557</td>
<td>4,416</td>
<td>44.61</td>
</tr>
</tbody>
</table>

Table 3.4  Employment in Hotels, 2009
Source: Ministry of Tourism, 2010
*Non-classified
**Calculated by Project Team
As seen from Table 3.4, 50.3 per cent of hotel sector employment is currently in the 5 star hotel category. When combined, the four and five star categories together account to 73 per cent of accommodation sector employment.

The last column of the table shows the level of Omanisation as calculated from the Ministry of Tourism data for the purposes of this project. According to this, in 2009 the highest level of Omanisation was achieved by the 4 star hotels (49.4 per cent), followed by the five star hotels with a 45.3 per cent level of Omanisation. Overall, according to these figures, the accommodation sector in 2009 achieved 44.61 per cent Omanisation.

The Omanisation target for this hotel sector for 2009 was set at 80 per cent. The achieved level of Omanisation currently falls short of this target. For a detailed discussion on this please refer to Section 3.7.

### 3.6 Salaries in Tourism

The Ministry of National Economy records official statistics on average salaries in key economic sectors. Table 3.5 shows the average salaries by industrial sectors. Industrial sectors are shown in descending order, ranked based on the official average salary for the sector.

<table>
<thead>
<tr>
<th>INDUSTRIAL SECTOR</th>
<th>OFFICIAL AVERAGE MONTHLY SALARY IN 2008 (OMR)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oil</td>
<td>2,485</td>
</tr>
<tr>
<td>Banking</td>
<td>1,308</td>
</tr>
<tr>
<td>Financial services</td>
<td>821</td>
</tr>
<tr>
<td>Other oil and gas related industries</td>
<td>779</td>
</tr>
<tr>
<td>Insurance</td>
<td>769</td>
</tr>
<tr>
<td>Education</td>
<td>621</td>
</tr>
<tr>
<td>Transportation</td>
<td>556</td>
</tr>
<tr>
<td>Healthcare</td>
<td>554</td>
</tr>
<tr>
<td>Commerce</td>
<td>430</td>
</tr>
<tr>
<td>NATIONAL AVERAGE</td>
<td>426</td>
</tr>
<tr>
<td>Services</td>
<td>362</td>
</tr>
<tr>
<td>Hotels</td>
<td>338</td>
</tr>
<tr>
<td>Construction</td>
<td>204</td>
</tr>
<tr>
<td>Restaurants</td>
<td>186</td>
</tr>
</tbody>
</table>

*Table 3.5 Official average salaries by economic sectors, 2008*

*Source: Ministry of National Economy 2008/09*
*It must be noted that tourism is not represented as a single economic activity in this classification. It is represented by two of its sub-sectors; hotels and restaurants. As a further clarification, the restaurant sector here includes both tourist and non-tourist restaurants. To illustrate the point, the data here includes salary information for 219 restaurants, of which about 55-60 are classified as tourist restaurants by the Ministry of Tourism

Salaries for other sub-sectors of tourism such the travel agency and tour operator sector, tourist transportation such as airlines and taxis, tourist attractions etc are included under the other economic sectors such as transportation, commerce and services. It also must be noted that salaries in hotels are augmented by the distribution of service charge which can be a significant contribution, particularly in the higher end hotels

Table 3.5 shows that the average salary in 2008 was 426 Omani Rial per month. The highest paying sectors were oil (OMR 2,485 per month), banking (OMR 1,308 per month), financial services (OMR 821 per month), other oil and gas related industries (OMR 779 per month) and insurance (OMR 769 per month). These sectors pay well above the national average salary. The tourism sector is represented here by two of its sub-sectors, hotels and restaurants. The average salary in hotels was recorded as OMR 338 per month, in restaurants OMR 185 per month. This means that the restaurant sector is officially the lowest paid sector, with an average recorded salary below that of the construction sector. The average salary in hotels (OMR 338) is just above the average salary paid by the construction sector and is below the national average.

To put these figures in the context of the official minimum salary, the official minimum wage is currently is set at OMR 120 per month by Ministry of Manpower Decree No 16/2007.

**IMPLICATIONS FOR THE ACTION PLAN**

- Oman has a relatively small population; some 69 per cent of the total population is Omani of which 40 per cent of the economically active population is in the 15-29 year age group. This suggests that there is a pool of Omani talent available for the tourism sector, if the sector is accessible and attractive for them.

- The official data shows that public sector employment is dominated by Omanis while private sector employment is dominated by expatriate employees, however there is currently no uniform estimate of the total number of tourism employees in Oman.

- The definition of tourism industry various amongst government agencies and according to purpose of data reporting.

- The tourism industry (here represented by hotels and restaurants) faces a strong competition by the traditionally well paid industries such as the oil and gas, telecommunication, banking and financial services industry which are all present and prominent in the Sultanate.

- The average salary in hotels and restaurants is below the national average salary and at level with the construction sector.
• The data hides the fact that salaries in other tourism sectors such as airlines, travel agencies are likely to be significantly higher than in hotels and restaurants industries which are bellow the national average.

• Despite the classification issues, the data points towards uncompetitive pay levels in two key sectors of tourism: hotels and restaurants, therefore the uncompetitive pay is likely to negatively affect the overall image of tourism industry as an employer.

• The large number of operative jobs in tourism brings down the average salary while the data does not show the high salaries received in managerial jobs in tourism how and why, the primary survey of tourism employees collected data on managerial salaries in the tourism sector.

• Following on from the above points, the perception of the Omani population is likely to be negatively influenced by the relatively low salary levels in the hotel and restaurant sectors and might not be aware of the high salaries paid in the industry, particularly in managerial jobs.

• There is a clear need for Government organizations to work together towards the development of a uniform classification system of tourism labour market and employment in order to better estimate the size of the tourism labour market and in order to monitor salaries across all tourism industry sub-sectors.

• This can be best achieved using the UNWTO Tourism Satellite Account Methodology (TSA). In the absence of TSA estimated, the current project will estimate the size of the tourism labour market based on available secondary data and survey data in order to provide a baseline figure until TSA figures will become available.

• There is a need to review salaries in tourism and consider raising the minimum salaries in the tourism industry.
3.7 Omanisation Policy in Tourism

Introduction
Omanisation Policy is the labour market nationalisation (or localisation) policy used in the Sultanate of Oman to replace expatriate workers with local staff. Similar labour market nationalization policies are used in other countries in the region such as Emiratization policy in the UAE, Saudization policy in Saudi Arabia. Given its importance to the project, Omanisation Policy and its implementation in the tourism sector was treated as a cross-cutting issue and was examined from the perspective of both secondary data and through the six surveys conducted for the project.

This Section will document the historical background of Omanisation and its current status in the tourism industry, together with an analysis of the current targets and their achievement. Official government data will be used for this analysis that has been collected and in the course of the project. The themes to be covered include historical background and the setting of Omanisation targets; current Omanisation targets for tourism; current achieved level of Omanisation in tourism; and legislation regarding enforcement.

Information gathered on the topic of Omanisation through the primary surveys will be presented in Section 4.

Historical Background
Omanisation policy receives a high priority in the Sultanate of Oman. A speech delivered by His Majesty Sultan Qaboos bin Said on the 28th National Day in November 1998 focused entirely on Omanisation. His Majesty Sultan Qaboos bin Said explicitly stated that: “It is important that citizens should be aware of their vital role in working for the success of the government’s plan for private sector employment, and for the gradual replacement by Omanis of skilled and unskilled expatriates. There are abundant opportunities for honourable work in this private sector. All Omani youth should accept this work unhesitatingly and without false pride. They should also devote themselves to the training and qualifying programs which are organised by the government and the private sector for the purpose of honing the skills they possess, and acquiring new skills that will enhance their performance” (Ministry of Information 2001: 208).

The first Omanisation law was passed in October 1994 by the Ministry of Social Affairs and Labour (MSAL). The MSAL announced percentages of Omanisation to be adopted by the private sector. For example, the laws stipulated that 60 per cent of employees in the transport, storage and communication sector should be Omani nationals, 45 per cent in the finance, insurance and real estate sector, 30 per cent in hotels and restaurants and 20 per cent in the wholesale and retail sector (Valeri, 2005).

Joint Committee for Omanisation in the Travel and Tourism Sector
The economic benefits generated by tourism encouraged the Government to make tourism a sector of strategic importance. The sector’s ability to create employment complements the government commitment to Omanisation. Therefore, in response to the recommendations of the Ministry of Manpower (Ministry of Tourism, 2002), instructions were given to all sectors, including tourism sector, to form committees to draw up appropriate Omanisation strategies specific to the individual requirements of each

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sector. The committee specifically dealing with the tourism sector is called the Joint Committee for Omanisation in the Travel and Tourism Sector and it is chaired by HE Undersecretary of Tourism.

The Joint Committee for Omanisation in the Travel and Tourism Sector is represented by officials from the Ministry of Tourism and Ministry of Manpower and includes representatives from the private sector. The private sector is currently represented by the following companies:

- Al Bustan Hotel
- Bahwan Travels and Tourism Agency
- Budget Rent A Car
- Pizza Hut Co.
- Oman Air

The data-collecting research and drafting team consists of members from:

- Ministry of Commerce and Industry.
- National Hospitality Institute
- Oman Tourism College
- Department of Tourism at Sultan Qaboos University

In addition, the committee is also supported by a number of administrative staff from the Ministry of Tourism and Ministry of Manpower to support the administration and secretarial work of the Committee.

**Monitoring of Omanisation Levels**

Monitoring of achieved Omanisation levels is conducted by the Ministry of Manpower. The monitoring process is survey based. The survey monitors Omanisation levels in the following five sectors of tourism:

1. Airlines
2. Tourist restaurants
3. Travel agencies & tour operators
4. Hotels (3-5 stars)
5. Car rental companies

The monitoring system includes 5 airlines, 37 tourist restaurants, 55 travel agencies, 50 hotels and 8 car rental companies. This classification excludes other sectors of tourism (cultural attractions, sport and leisure facilities such as dive centres, marinas and golf courses, conference centres, conference organizing and event management companies) some of which are likely to see considerable growth in the coming years. Furthermore, this classification includes only restaurants that are officially classified as tourist restaurants. The classification also excludes the museums and the 22 forts managed by the Ministry of Tourism, taxi drivers, who by law have to be Omani Nationals and tour guides who are licensed by the Ministry of Tourism. Furthermore, the classification does not take into account other tourism businesses such as event management companies, sport and recreational facilities, souvenir shops and tourist attractions such as the camel and horse racing.
This classification system is likely to result in an underreporting of Omanisation levels for the tourism sector as some of its sub-sectors, such as the tourist attractions and museums, conference organising businesses and taxi drivers (who are Omani nationals by Law) are likely to have higher levels of Omanisation. Section 4.2 reports the levels of Omanisation found in the tourism sub-sectors from the tourism firm survey conducted for this project.

**Current Omanisation Targets for Tourism**

The current Omanisation targets were set by the Joint Committee for Omanisation in the Travel and Tourism Sector for the 2005-2010 period. Table 3.6 below shows the Omanisation targets set for the tourism industry for this period:

<table>
<thead>
<tr>
<th>Tourism Sector</th>
<th>Planned Omanisation Target for 2005-2010 (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2005</td>
</tr>
<tr>
<td>Airlines</td>
<td></td>
</tr>
<tr>
<td></td>
<td>78</td>
</tr>
<tr>
<td>Tourist restaurants</td>
<td>50</td>
</tr>
<tr>
<td>Travel agencies and tour operators</td>
<td>50</td>
</tr>
<tr>
<td>Hotels (3-5 stars)</td>
<td>50</td>
</tr>
<tr>
<td>Car Rental</td>
<td>60</td>
</tr>
</tbody>
</table>

*Source: Ministry of Manpower (2009)*

As seen from Table 3.6, the Omanisation targets for the sector were set progressively, starting with a target of 50 per cent for the restaurant, travel agency/tour operator and hotel sectors in 2005 and the targets were set to increase progressively each year across all tourism subsectors. By 2010 the hotel sector was set to achieve 85 per cent Omanisation, airlines, tourist restaurants and car rental companies 90 per cent Omanisation and travel agencies and tour operators 95 per cent Omanisation.
**Current Achieved Levels of Omanisation in the Tourism Sector**

According to the latest available data for May 2010 (Ministry of Manpower, 01/05/2010), the tourism sector achieved the following levels of Omanisation:

- Airlines: 60 per cent
- Tourist restaurants: 36 per cent
- Travel agencies: 50 per cent
- Hotels (3-5 stars): 48 per cent
- Car rental companies: 53 per cent

The highest level of Omanisation is reported for the airline sector at 60 per cent, the lowest for the restaurant sector at 36 per cent.

It is evident from the data that none of the tourism sub-sectors have reached the planned level of Omanisation by 2010. There are a number of likely reasons behind this discrepancy. Firstly, at the time when the targets were set in 2005, the scale of industry expansion was likely unclear. Industry expansion is linked with increased labour demand and meeting that demand surge from indigenous labour was always a very challenging task. Secondly, tourism is a relatively new industry in the Sultanate and the Omani population is likely not have had sufficient experience with and knowledge of tourism sector employment. In other words, tourism might not be an obvious career choice for your Omanis and their parents who advise them in their career choice. Thirdly, the image of tourism sector employment might not be favourable. Fourthly, given the short period of time, the tourism education and training system did not have sufficient time to produce the number of graduates needed in the industry.

These are assumptions that can be made based on the secondary information available. One of the key objectives of the Tourism Manpower and Training Needs Analysis conducted as part of this project is to examine the barriers to Omanisation in the tourism sector and to recommend appropriate measures to overcome them. Section 4 of the report will provide findings on Omanisation Policy issues from the primary surveys and the Action Plan in Section 5 will contain the recommendations that are formulated on the basis of the analysis.

**Minimum Salaries for Omani Employees in the Tourism Sector as part of the Omanisation Policy**

Following the Third Symposium for Omanisation held in Wilayat Shinas on 30 January - 1 February 2005 and in Wilayat Ibri on 14-16 February 2005, the Ministry of Tourism and Ministry of Manpower have jointly set and announced minimum salaries for Omani employees working in the tourism sector. This announcement was sent to tourism companies in 2005. The Joint Committee for Omanisation in the Travel and Tourism Sector set the following minimum salaries with effect from 1 January 2006:

- Specialists: RO 400 + Allowances
- Technicians: RO 300 + Allowances
- Vocational: RO 250 + Allowances
- Skilled Labour: RO 200 + Allowances
- Semi-Skilled Labour: RO 150 + Allowances
The minimum salary scale ranges from OMR150 + allowance to OMR 400 + allowances. The top level minimum salary is just below the current (2008) national average salary of OMR 426 (See Table 3.5).

Two questions arise in relation to this. Firstly, to what extent are managers in the sector aware of this regulatory framework and to what extent they comply, and, secondly, how the salary scale is viewed by industry. When interpreting the views, caution must be taken as it is the short-term operational interest of companies to push salaries down but this might not be in the best long-term interest of the tourism industry. For this reason, balance must be found between freeing the labour market completely and setting salaries too high at the detriment of Omani job-seekers. This issue will be further explored in Sections 4 and 5 of the Report.

IMPLICATIONS FOR THE ACTION PLAN

- There is a paucity of available data and statistics on the tourism labour market
- The term “Omanisation” is highly exhausted and became more political terminology rather than part of a strategic plan. The main aims and objectives of the Omanisation strategy were to reduce numbers of expatriates and increase the percentage of locals in private sectors. Numbers of expatriates doubled compared to strategy objectives increased from almost 500,000 in 2005 to above 1,000,000 employees, in contrast the numbers of locals in private did not exceed 200,000 until the end of September 2010 (Ministry of Manpower, 2010).
- The tourism sector has made considerable progress in Omanizing its labour force under conditions of expansion and despite tourism being a relatively new economic sector in the Sultanate.
- Current levels of Omanisation lag behind the targets set for 2010.
- The current Omanisation targets need to be re-set for levels that are achievable by the tourism sector and meet the society requirements.
- There is collaboration between the Ministry of Tourism, Ministry of Manpower and the private sector in the setting of Omanisation targets for the tourism sector but monitoring of Omanisation policy implementation is primarily conducted by the Ministry of Manpower and others are just observers.
- The classification of tourism labour market does not include the full spectrum of tourism businesses.

Following from these:
- A professional database and spastics units are needed.
- There is a need for a dedicated HR strategy and enhancing communication between government organisations: It appears that more collaboration is required particularly at the middle levels between economic planners (Ministry of Economy), tourism policymakers (Ministry of Tourism), education & higher
education policymakers and providers (Ministry of Education and Ministry of Higher Education) and responsible authorities for employment. (Ministry of Manpower)

- Terminologies like “HR strategy” or “employment strategy” have a broader meaning and are much better to be used instead of “Omanisation” is a broader terminology and better to be used instead.

- Better planning and quick revision is needed of the workforces in the country. Omanisation percentages are set 4-5 years back, but no revision or evaluations have been made to these plans and strategies. And if there was a revision, it was done by the Ministry of Manpower alone or with the Omanisation stakeholders/committee.

- There is a need for a training committee: All training policies and implementations are currently under the Ministry of Manpower. There is therefore a need for broader training committee with members from stockholders: Ministry of manpower, tourism, training providers and chamber.

- There is a need for strengthened collaboration between the Ministry of Tourism and Ministry of Manpower in employment monitoring including Omanisation.

- There is a need for a comprehensive employment/HR strategy rather than “Omanisation” committee and more comprehensive definition of tourism labour market

- Omanisation targets for the tourism sector need to be re-set at a level that takes into account the changed market conditions, tourism sector expansion and allows time for the sector to grow its own Omani talent base

- Omanisation efforts must not jeopardise the long-term viability of the tourism industry and should not jeopardise product, service and safety standards
3.8 Stakeholders in Tourism Human Resource Management in Oman

The information presented here is a result of both desk research and interviews conducted with senior officials and experts at the Ministry of Tourism, Ministry of Manpower, Ministry of Higher Education, tourism education and training institutions and relevant representatives from the private sector.

It is evident from the information obtained that a number of public, private sector organisations, as well as education and training institutions, have specific responsibilities for tourism human resource development. However, none of these organizations or stakeholders currently play a lead agency role. At present, the key stakeholders are identified as:

- Ministry of Tourism
- Ministry of Manpower
- Ministry of National Economy
- Ministry of Higher Education
- Oman Academic Accreditation Authority (QAAA)
- Ministry of Education
- Ministry of Transport and Communication
- Royal Oman Police (ROP)
- Oman Chamber of Commerce
- Education and Training Institutions
- Tourism Industry Firms

Ministry of Tourism

The Ministry of Tourism is a key stakeholder in tourism human resources as it is the Ministry that has the overall responsibility for the development of the tourism industry in the Sultanate. The Ministry was established in June 2004, by Sultanate Decree. Previously, financial allocations and assets relating to tourism were the responsibility of the Directorate General of Tourism operating within the Ministries of Commerce and Industry.

The Ministry of Tourism has been charged with four key objectives:
- To increase the tourism sector contribution to the GDP;
- To assist the government and society in the social and economic development by establishing a comprehensive development vision for the tourism sector;
- To increase the level of employment of Omani nationals in the sector;
- To increase the average annual growth rate for the income from tourism; and
- To be responsible for the promotion and marketing of Oman as a tourist destination.

(Taken from the Ministry of Tourism “Working paper on Tourism and Travel Sector” 30 January 2005 cited in the Oman Tourism Development Plan 2006-2010)
The Ministry of Tourism sets the overall strategy for tourism development in the Sultanate and human resources are part of this strategy. The tourism development strategy that is providing the current roadmap to tourism development in the Sultanate is the National Tourism Development Plan (2006-2010). The Plan was developed to assist in the social and economic development of The Sultanate and to establish a comprehensive development vision for the tourism sector, including the identification of opportunities for future growth an implementation mechanisms.

The National Tourism Development Plan (2006-2010) states the following vision statement: “To develop tourism as an important and sustainable socio-economic sector of the Sultanate in a manner that reflects the Sultanate's historic, cultural and environmental heritage and sense of traditional hospitality and values ” and cited the following mission statement "To help facilitate economic diversification, preservation of cultural integrity and environmental protection of The Sultanate " p.1.

Through the National Tourism Development Plan (2006-2010), The Ministry of Tourism has set out a roadmap towards a sustainable development of tourism that benefits the local population and respects local customs and traditions. At the same time, the Strategy points in the direction tourism development in the higher end of the market. To meet this strategy requires sustained high quality tourism products and levels of service. These, in turn, can only be achieved with quality human resources, human resources with appropriate training, the right service attitude and with high levels of motivation.

The Ministry of Tourism has an important role in liaising with tourism sector companies as it is licensing many of the tourism businesses (currently hotels, tourist restaurants, tour guides, travel agencies and tour operators, forts and castles) and gives approval for new investment projects.

The Ministry of Tourism does not directly collect data on tourism labour market issues but uses statistics received from other government agencies, such as data on Omanisation levels from the Ministry of Manpower and Ministry of National Economy.

**Ministry of Manpower**

The Ministry of Manpower was established by Royal Decree No.(108/2001). The Ministry proposes and implements manpower general policies in line with the State economic and social objectives. The Ministry’s prerogatives include the following 7:

- Preparation of draft laws and systems regulating the labour market and vocational training sector in the Sultanate and issuance of regulations and decisions to implement same and protection of national labour force and availing all potentials which help develop capabilities of this national labour force.

- Building up an integrated labour market informational system and preparing the national labour force register with the aim of developing human resources in the country and ensuring the optimum utilization of them.

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- Applying, following up and monitoring implementation of the labour law and regulations and providing labour care in coordination with the concerned authorities.

- Studying the private sector’s requirements of expatriate labour force and drafting procurement regulations and issuing pertinent licenses, in accordance with regulations and decisions in force.

- Providing vocational training and technical training and developing and expanding same according to the requirements of the labour market.

- Developing training curricula according to the approved vocational criteria and levels, awarding qualifications, encouraging on job training and following up graduates to ensure that they utilize the available job opportunities.

- Contributing to the national efforts aimed at availing vocational guidance programmes and raising awareness with the values of work and encouraging the spirit of individual initiatives among citizens.

- Implementing and following up all programmes relating to the employment of the national workforce and assessing its performance in cooperation with the concerned authorities.

- Preparation of plans to develop labour methods and upgrade employees performance and develop human resources at the ministry.

- Representing the Sultanate in local, regional and international conferences, seminars and meetings relating to labour force and its training.

From the perspective of tourism human resources development, an important function of the Ministry of Manpower is the control of foreign labour through work visas.

Additionally, the Ministry supports vocational training through the Ministry’s funding mechanism. According to information received verbally to Ministry of Manpower, this type of funding represents some 30-60 per cent of their institutional budget. According to verbal information received via the project’s consultation with the Ministry of Manpower, tourism receives a relatively large share from the fund; in 2007 and 2008 it received some 17 per cent of all funded places and this figure currently stands at some 40 per cent in August 2010. It must be noted that the figure for 2010 is indicative only and may change in either direction.

According to the Ministry of Manpower, the funding mechanism is currently lead by requests from employers and by the requirements of the Omanisation policy rather than by requests from training institutions. In other words, the Ministry of Manpower matches employers’ requests for training with job seekers wishing to undertake tourism related training rather than giving blank funding to training institutions (for more detailed information please refer to Section 4.6).

Furthermore, the Ministry of Manpower is also involved in the design of occupational standards and curriculum development for training institutions. The Ministry through its
Occupational Standards and Skills Center has been working to develop occupational standards. According to information received from the Ministry of Manpower, there will finally be 60 labour market oriented Advanced Occupational Standards developed by the OSSTC-Project in close cooperation with the private sector, and they will be allocated to the following 14 occupational clusters:

1. Agriculture & fishing industry;
2. Maritime industry;
3. Catering, hotel service & restaurants;
4. Building and construction and carpentry;
5. Commercial field – trade, offices, finances, administration;
6. Transportation, equipment operation and communication;
7. Tourism and cultural recreation;
8. Manufacturing processes and mechanical engineering;
9. Electrical and electronic technology and communication,
10. Automotive & aviation services;
11. Health services
12. Food production and nutrition
13. Electronic media design;
14. Social and personnel services, government services, education.

The tourism sector is represented by two sectors, tourism and cultural recreation and catering, hotel services and restaurants. In total 6 occupational standards are planned for development for the tourism sector:

**Tourism and cultural recreation**
Travel Agent; Tour Guide
**Catering, hotel service & restaurants**
Housekeeper; General Waiter; Receptionist; Chef

These occupational clusters and standards will serve as the main programme lines for vocational specialization which will be followed for the development of new curricula. The development of occupational standards for the tourism sector will have a standardization effect on the tourism training curriculum and will enhance student employability. It must be noted that these standards are currently developed without direct involvement of the Ministry of Tourism and this indicated lack of coordination between the two Government agencies in this field.

**Ministry of Tourism and Ministry of Manpower**
The Ministry of Tourism has a joint involvement with the Ministry of Manpower (together with the tourism industry) in setting the Omanisation targets. This is conducted through the dedicated Joint Committee for Omanisation in the Travel and Tourism Sector (See Section 3.7). The monitoring of achieved levels of Omanisation is undertaken by the Ministry of Manpower.

**Ministry of National Economy**
The Ministry of National Economy is considered as the authorised body, based on the Royal Decree No. 4/1999, to propose the development strategy and future trends for the national economy. Furthermore, the Ministry is responsible for preparing the country’s development plans and investment programs with their implementation priorities as per the approved development objectives. In addition, the Ministry is responsible to conduct
studies on the regional and international trends and their impact on the national economical policy of the Sultanate while working on strengthening the country’s public relations in the economical area between the Sultanate and other countries. The Ministry of National Economy is a stakeholder in tourism human resource development as it is currently responsible for statistical data collection and dissemination, including statistics related to tourism labour market and human resources. This is currently conducted without direct involvement from the Ministry of Tourism but in the future it would be beneficial to coordinate tourism labour market classification systems and for the two Ministries to strengthen collaboration in the area of tourism labour market data collection.

Ministry of Higher Education
The Ministry of Higher Education was established by Royal Decree 2/1994 in 1994 and it was established to oversee education after general education. The Ministry oversees the Colleges of Applied Sciences and provides scholarships for students studying both within and outside of Oman. The Ministry is responsible for higher education programmes and institutions in the field of tourism. The Ministry licenses higher education institutions and programmes and performs quality control through institutional inspections. The Ministry also provides scholarships for overseas study at postgraduate level in tourism. In 2010, the Ministry provided 177 scholarships for students studying tourism and 63 per cent of these places were awarded for Oman Tourism College (for further information please refer to Section 4.6)

Institutions that offer tourism disciplines and currently under Ministry of Higher Education:
- Colleges of Applied Sciences
- Oman Tourism College (partly)
- GuTEch
- Majan College
- Gulf College
- Sur University College
- Al Buraimi University

Sultan Qaboos University runs as an independent institution and the Minister of higher education is the chairman of university council

Oman Academic Accreditation Authority (QAAA)
The Oman Academic Accreditation Authority (OAAA) is charged with assisting in the development of the higher education sector in Oman through institutional quality audits and institutional and program accreditation processes. Also, in collaboration with the Ministry of Higher Education, it has responsibilities for establishing academic standards, and providing training and networking opportunities. The predecessor of OAAA is the Oman Accreditation Council (OAC). OAC was established by Royal Decree in 2001. In May 2010 OAC became Oman Academic Accreditation Authority.

Ministry of Education
Until now the Ministry has had limited direct involvement in tourism human resource development. The only direct contribution has been the integration of tourism related

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subjects into the general curriculum (see Section 4.6); however the role of the Ministry is set to expand through the recent signing of the Memorandum of Understanding with the Ministry of Tourism and Muriya Tourism Development Company for the development of a secondary school level international hotel school in Sifah. This will be a unique project and will mark the beginning of secondary school level vocational training for tourism in the Sultanate.

**Ministry of Transport and Communication**

The Ministry of Transport and Communication's main responsibilities are as follows:

1. Linking the various regions of the Sultanate and neighbouring countries by asphalted network of roads within the financial means available.

2. Conducting studies and presenting suggestion related to planned seaports and Airports, that are to be constructed in the future, as well as the operation and managements of existing ones.

3. Linking the Sultanate locally and internationally by a network of wire and wireless telecommunications utilizing the most modern technology available in the world to serve the interest of the country.

The Ministry of Transport and Communication is responsible for Oman Air and Oman Airports Management Company. Currently Oman Air employees some 5,000 employees and Oman Airports Management Company a further 450, representing a relatively large proportion of the tourism labour force.

**Royal Oman Police**

The involvement of Royal Oman Police (ROP) within tourism involves the licensing of taxi drivers, who by law must be Omani citizens.

**Oman Chamber of Commerce**

Established in 1973 by virtue of a Royal Decree as a public utility organization, the Oman Chamber of Commerce and Industry (OCCI) is the apex body of Oman's private sector, which represents it at local and international levels and acts as a catalyst in activating Oman's national economy. OCCI also plays a significant role in implementing the country's developmental plans aimed at diversifying the national income sources. Several services and consultations are provided by OCCI to its members as well as the local and foreign businessmen in economic, commercial, legal and information areas. OCCI conducts trade missions to foreign countries and receives business delegation from its counterparts from overseas, with a view to expanding bilateral trade and exchange of expertise, investment and technical know-how. It also participates in international and local trade fairs, economic seminars and conference in different parts of the world.

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10 [http://www.omanchamber.com](http://www.omanchamber.com)
The Chamber participates in tourism human resource development through its Tourism and Real Estate Investment Committee\textsuperscript{11}. The Committee is responsible for the:

- Study the development and raise of the level of performance and potentials in travel and tourism market and address the challenges and constraints facing the industry.
- Study the development and diversification of travel and tourism infrastructure (Hotels, tourist villages, resorts, beaches, and travel agencies) in order to make it accessible to larger segments of the income levels of citizens and residents.
- Promote and develop the establishment of specialized academic institutions for the rehabilitation of human resources to work in the travel and tourism industry and propose policies and programs for the development of Omanisation and training in this sector to serve the requirements of development.
- Address and find common solutions to the problems of travel and tourism sector to boost its future growth and try to overcome all difficulties and obstacles that impede its development.
- Revitalize the organization of travel and tourism exhibitions to stimulate travel and tourism sector, contribute to the development and increase national income.
- Prepare travel and tourism programs and develop a comprehensive plan to attract more tourists in coordination with the advertising campaigns in the media.
- Discuss the difficulties related to the maritime, land, and air transport sectors and try to put forward appropriate solutions to improve and develop these sectors in line with the development of policies and overall development.
- Discuss the difficulties and obstacles relating to real estate and rentals, including laws, settle disputes, propose amendments and appropriate solutions and submit them to the concerned authorities.
- Study and discuss the practical and procedural obstacles that prevent the development of travel and tourism in the Sultanate.
- Organise conferences, seminars and training courses in the field of tourism and real estate investment.

\textbf{Tourism Education and Training Institutions}

Tourism Education and Training institutions are responsible for tourism human resource development through the provision of formal tourism education and training programmes in the Sultanate. This is a new and expanding sector that has not yet reached maturity. Currently there formal education and training for tourism is provided at higher education level and through the delivery of short courses. Both the top level education (Master's level and PhD level education) and secondary school level vocational training are currently missing from the portfolio of tourism education and training provision although firm plans are in place for the development of the latter through a joint Ministry of Tourism, Ministry of Education and private sector project.

Tourism education and training institutions play a key role in tourism human resource development both in quantitative and qualitative terms. In other words they are responsible for matching the demand for trained tourism human resources both in terms of the number of graduates they train and in terms of their human capital and skill matching with tourism industry needs.

\textsuperscript{11} \url{http://www.chamberoman.com/en/Content.aspx?SecNo=101}
It must be noted that tourism education and training institutions do not train exclusively for the tourism industry as the graduates have transferable skills that can be used by other economic sectors, particularly institutional catering and army catering, retail and graduates can sell their training in finance, marketing, customer service, languages etc on the labour market.

On the other hand, because of the diversity and wide range of the skills that the tourism industry needs, graduates from non tourism and hotel programmes can find employment opportunities in tourism, particularly those with qualifications in subjects such as marketing, finance, human resources management, IT etc. This makes the quantitative matching of education supply and industry demand for skilled human resources in tourism often difficult. The other issue to note is that the sector, particularly the hotel sector traditionally values work experience highly.

Nonetheless, the responsibility of the tourism education and training sector in human resources development is hugely significant and it ranges from student selection, curriculum development, partner institution selection, investment in education resources, recruitment of academic staff, industry liaison and awareness and image creation. The sector is involved in education and training provision for both part time and full time students and is also responsible for the delivery of continuous professional development.

Tourism Industry Firms
Tourism industry firms have a direct responsibility for tourism human resource development through their human resource management and development processes and liaison with education and training institutions. The industry also has responsibility to assist the government and the society with the implementation of the Omanisation Policy. The role of the tourism industry in training provision can not be underestimated and the industry needs to be dedicated with resources for human resource development for the tourism industry. Of particular importance are the large employers and international and multinational firms as they have the largest resources for training and they tend to have dedicated training departments that can bring international standard training and skills into the country.

IMPLICATIONS FOR THE ACTION PLAN

- There is considerable effort from all stakeholders for the development of tourism human resources development.

- Government level responsibility for tourism human resources development is fragmented amongst a number of Ministries and organizations such as: Ministry of Tourism, Ministry of Manpower, Ministry of National Economy, Ministry of Higher Education, Ministry of Education, Ministry of Transport and Communication, Royal Oman Police, Oman Accreditation Agency.

- There is no overall control nor any formal mechanism for the overall management and monitoring of tourism human resources development. However, instead of overall control and management, there are currently collaborative arrangements in place such as:
• The Ministry of Tourism working with the Ministry of Manpower on managing Omanisation policy through the Tourism Sector Skills Committee

• The Ministry of Tourism has recently signed a MoU for the setting up of a Hotel School at secondary school level with Muriya Development Company

• The Ministry of Manpower through its vocational training funding mechanism liaises and manages training needs and provision between tourism industry companies, job seekers and training providers

• Educational institutions and Training centres place their students at tourism sector companies for work experience. Tourism industry benefits from all institutions despite the discipline they offer

• There is a clear need to further strengthen the overall control, collaboration and also communication flow amongst the different government agencies and between the public, private sector and education and training institutions in the area of tourism human resources development.

• There is also a need for the Ministry of Tourism to increase its involvement and act as a lead agency for tourism human resources development in Oman
4. SITUATION ANALYSIS: TOURISM MANPOWER AND TRAINING NEEDS ANALYSIS (PART B)

4.1 Introduction
Section 4 documents the results and findings from each survey and highlight the manpower shortages and human resources issues from a number of supply and demand side perspectives. For a description of the methodological approaches, please refer to Section 2 of the Report.

Figure 4.1 shows the composition of the survey work conducted for this project. In total six primary surveys were conducted as part of this project and the results form the backbone of the Manpower Survey and Training Needs Analysis (2011-2020).

Figure 4.1 Primary Data Surveys
The survey results are presented in the following order: (1) Survey of tourism firms, (2) Survey of HR Directors, (3) Survey of tourism employees, (4) Survey of Omani people, (5) Survey of tourism education and training providers and (6) Survey of Integrated Tourism Complexes.
4.2 SURVEY OF TOURISM FIRMS

The Sample
The survey results include responses from 289 tourism companies, including hotels, tour operators, travel agencies, restaurants, dive centres, car hire companies, airlines and airline offices, museums and tourist attractions, water sports centres and marinas, golf clubs and others. The number of companies and response rates by sector are shown in the Table 4.1 below.

<table>
<thead>
<tr>
<th>Type of Business</th>
<th>Number of Respondents</th>
<th>Number of Companies in Database</th>
<th>Response rate (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Hotel</td>
<td>154</td>
<td>228</td>
<td>68</td>
</tr>
<tr>
<td>2 Tour Operator/Travel Agency</td>
<td>84</td>
<td>228</td>
<td>37</td>
</tr>
<tr>
<td>3 Restaurant</td>
<td>21</td>
<td>55</td>
<td>38</td>
</tr>
<tr>
<td>4 Dive Centre</td>
<td>6</td>
<td>11</td>
<td>55</td>
</tr>
<tr>
<td>5 Car Hire Company</td>
<td>6</td>
<td>12</td>
<td>50</td>
</tr>
<tr>
<td>6 Airline</td>
<td>4</td>
<td>23</td>
<td>17</td>
</tr>
<tr>
<td>7 Museum/Tourist Attraction</td>
<td>4</td>
<td>34</td>
<td>12</td>
</tr>
<tr>
<td>8 Water Sports Centre/Marina</td>
<td>4</td>
<td>6</td>
<td>67</td>
</tr>
<tr>
<td>9 Golf Club</td>
<td>1</td>
<td>5</td>
<td>20</td>
</tr>
<tr>
<td>10 Other</td>
<td>5</td>
<td>23</td>
<td>22</td>
</tr>
<tr>
<td>Total</td>
<td>289</td>
<td>625</td>
<td>46</td>
</tr>
</tbody>
</table>

Table 4.1 Survey Response Rates by Tourism Sub-sector

As Table 4.1 shows, the overall response rate for the survey was calculated at 46 per cent. The highest response rate was achieved by the hotel sector (68 per cent), dive centres (55 per cent) and car hire companies (50 per cent). The lowest response rate was achieved for museums and other tourist attractions (12 per cent).

The accommodation (hotel) sector was represented in the survey by all of its sub-sectors, ranging from 5-star hotels to 1 star and non-classified establishments. High response rates were expected from the 3-5 star hotels as these tend to have separate HR departments and hence would be more prepared to participate in the survey. Overall, the sector responded very well to the survey request. Table 4.2 below shows the detailed response rate information for the accommodation sector.
<table>
<thead>
<tr>
<th>Star Rating</th>
<th>Number of Companies Responding</th>
<th>Number of Hotels in Project Database</th>
<th>Response Rate (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Star</td>
<td>71</td>
<td>108</td>
<td>66</td>
</tr>
<tr>
<td>2 Stars</td>
<td>27</td>
<td>38</td>
<td>71</td>
</tr>
<tr>
<td>3 Stars</td>
<td>16</td>
<td>23</td>
<td>70</td>
</tr>
<tr>
<td>4 Stars</td>
<td>12</td>
<td>14</td>
<td>86</td>
</tr>
<tr>
<td>5 Stars</td>
<td>11</td>
<td>13</td>
<td>85</td>
</tr>
<tr>
<td>Not Classified</td>
<td>17</td>
<td>32</td>
<td>53</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>154</strong></td>
<td><strong>228</strong></td>
<td><strong>68</strong></td>
</tr>
</tbody>
</table>

**Table 4.2 Survey Response Rate for the Accommodation Sector**

As seen from Table 4.2, the sector achieved a relatively high response rate of 68 per cent, with particularly high response rate achieved from the 5-star hotels (85 per cent) and 4-star hotels (86 per cent). The lowest response rate (53 per cent) was achieved from the non-classified accommodation sector.

As described in Section 2, the survey was distributed in all regions and Governorates of the Sultanate with the objective of obtaining data from the different regions and thus capturing the overall state of the tourism human resources in the country. Table 4.3 shows the share of the regions from the responses.

<table>
<thead>
<tr>
<th>Region</th>
<th>Percentage of Respondents From Total Sample (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>MUSCAT</td>
<td>58</td>
</tr>
<tr>
<td>MUSANDAM</td>
<td>4</td>
</tr>
<tr>
<td>DHOFAR</td>
<td>7</td>
</tr>
<tr>
<td>A'SHARQIYA</td>
<td>6</td>
</tr>
<tr>
<td>AL WUSTA</td>
<td>2</td>
</tr>
<tr>
<td>AL BURAIMI</td>
<td>7</td>
</tr>
<tr>
<td>AL BATINAH</td>
<td>8</td>
</tr>
<tr>
<td>A'DHAHIRAH</td>
<td>1</td>
</tr>
<tr>
<td>A'DAKHILIYA</td>
<td>7</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>100</strong></td>
</tr>
</tbody>
</table>

**Table 4.3 Share of the Regions from Survey Responses**

As seen from Table 4.3, 58 per cent of the responses were obtained from Muscat and the remaining 42 per cent from the other eight regions. This represents a balanced regional response.
**Employees by Job Level**
Of particular interest to the survey was the distribution of employees across job levels and then the distribution of Omani and non-Omani employees across these job hierarchies. The survey used the categories of managerial, supervisory and operative to measure the skill pyramid in the sector. As there is no standard classification that can be applied, the classification of their employees into these three categories was left at the judgement of the HR Directors. This worked well and data quality was strong. *Figure 4.2* shows the division of labour for the tourism sector by job type.

![Figure 4.2 Employees by Skill Level in Tourism](image)

As *Figure 4.2* shows, it was found that 9 per cent of tourism employees are in managerial, 15 per cent in supervisory and 76 per cent in the operative jobs. This shows a healthy distribution and is in line with general industry figures.

The analysis applied sample splits to separate the hotel and non-hotel part of tourism. For the hotel sector the proportions were found to be similar, with 10 per cent of the employees in managerial, 17 per cent in supervisory and 73 per cent in operative jobs. For the non-hotel firms, the pyramid is also similar, with 8 per cent of employees working in managerial jobs, 12 per cent in supervisory and 80 per cent in operative jobs.
Percentage and Distribution of Omani Employees in Tourism
The survey collected detailed data on the distribution of tourism employees across all tourism sector by gender and nationality (Omani and non-Omani). The data was crosschecked and cleaned to ensure high data quality.

Table 4.4 below shows the percentage of Omani and non-Omani employees by gender across all tourism sub-sectors.

<table>
<thead>
<tr>
<th>Type of Firms / Number of Employees</th>
<th>Percentage of Omani Employees (Directly Employed)</th>
<th>All Omani Employees</th>
<th>Percentage of Non-Omani Employees (Directly Employed)</th>
<th>All Non-Omani Employees</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Male</td>
<td>Female</td>
<td>All Male</td>
<td>All Female</td>
</tr>
<tr>
<td>1 Hotel</td>
<td>40</td>
<td>6</td>
<td>46</td>
<td>44</td>
</tr>
<tr>
<td>2 Tour Operator/Travel Agency</td>
<td>35</td>
<td>17</td>
<td>53</td>
<td>39</td>
</tr>
<tr>
<td>3 Restaurant</td>
<td>32</td>
<td>7</td>
<td>39</td>
<td>57</td>
</tr>
<tr>
<td>4 Dive Centre</td>
<td>61</td>
<td>1</td>
<td>62</td>
<td>29</td>
</tr>
<tr>
<td>5 Car Hire Company</td>
<td>62</td>
<td>11</td>
<td>73</td>
<td>26</td>
</tr>
<tr>
<td>6 Airline</td>
<td>55</td>
<td>7</td>
<td>62</td>
<td>21</td>
</tr>
<tr>
<td>7 Museum/Tourist Attraction</td>
<td>46</td>
<td>32</td>
<td>78</td>
<td>19</td>
</tr>
<tr>
<td>8 Water Sports Centre/Marina</td>
<td>49</td>
<td>4</td>
<td>53</td>
<td>44</td>
</tr>
<tr>
<td>9 Golf Club</td>
<td>49</td>
<td>4</td>
<td>53</td>
<td>42</td>
</tr>
<tr>
<td>10 Other Type</td>
<td>17</td>
<td>4</td>
<td>21</td>
<td>79</td>
</tr>
<tr>
<td>Total</td>
<td>42</td>
<td>7</td>
<td>49</td>
<td>41</td>
</tr>
</tbody>
</table>

Table 4.4 Percentage of Omani and non-Omani Employees Across the Tourism Sub-sectors

As seen from the above table, the survey found that, overall, the tourism sector has reached 49 per cent level of Omanisation.

The highest levels of Omanisation were reported by museums/attractions (78 per cent), car hire companies (73 per cent), airlines (62 per cent) and dive centres (62 per cent). Lowest levels of Omanisation were reported by the restaurant sector (39 per cent), water sport centres (53 per cent), tour operators and travel agencies (53 per cent) and golf clubs (53 per cent). The hotel sector reported 46 per cent Omanisation and with this stand in the middle of the ranking.

This data is broadly in line with the Omanisation data produced by the Ministry of Manpower but the survey included a wider spectrum of tourism businesses and a larger sample.

The survey found a slightly lower level of Omanisation in the hotel sector, at 46 per cent as opposed to 48 per cent reported by the Ministry of Manpower. The difference is mainly attributable to the fact that the survey included 1 and 2 star accommodations and non-classified accommodations and these are likely to have lower proportion of Omani
employees than the large 4 and 5 star hotels. The survey found remarkable higher levels of Omanisation than officially reported in the car hire sector (73 per cent as opposed to 53 per cent reported by the Ministry of Manpower. This is likely due to the larger sample size achieved in this survey. Travel agencies and tour operators reported similar levels of Omanisation (53 per cent and 50 per cent). The survey confirmed the relatively low level of Omanisation in the restaurant sector but discovered slightly higher levels of Omanisation at 39 per cent than the officially reported 36 per cent. It is pertinent to emphasize here that if the restaurant sector was defined beyond what is currently classified as tourist restaurants, the Omanisation ratio is likely to be different for that sector. This classification issue needs to be tackled in conjunction with the development of the UNWTO Tourism Satellite Account system.

The findings are encouraging and they show that there are sectors of the tourism industry that are already attractive and accessible to the Omani population. The survey results also point to the fact that the monitoring system of Omanisation levels should be developed further to include the new and emerging sectors of tourism such as the attractions, conference organising businesses and sports and recreational facilities and the classification of restaurants needs to be addressed.

**Gender Distribution of Omani Tourism Employees**

*Table 4.5* shows the gender distribution of Omani employees.

<table>
<thead>
<tr>
<th>Tourism Sector</th>
<th>Number of Omani Employees</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Male %</td>
</tr>
<tr>
<td>Hotel</td>
<td>40</td>
</tr>
<tr>
<td>Tour Operator/Travel Agency</td>
<td>35</td>
</tr>
<tr>
<td>Restaurant</td>
<td>32</td>
</tr>
<tr>
<td>Dive Centre</td>
<td>61</td>
</tr>
<tr>
<td>Car Hire Company</td>
<td>62</td>
</tr>
<tr>
<td>Airline</td>
<td>55</td>
</tr>
<tr>
<td>Museum/Tourist Attraction</td>
<td>46</td>
</tr>
<tr>
<td>Water Sports Centre/Marina</td>
<td>49</td>
</tr>
<tr>
<td>Golf Club</td>
<td>49</td>
</tr>
<tr>
<td>Other Type</td>
<td>17</td>
</tr>
<tr>
<td>Total</td>
<td>42</td>
</tr>
</tbody>
</table>

*Table 4.5*  **Gender Distribution of Omani Employees**

*Table 4.5* shows that of all tourism employees, 40 per cent are Omani males and 6 per cent are Omani females. Omani females show the highest propensity to work in museums and attractions, tour operator and car hire companies and least likely to work in sports facilities, restaurants and hotels.
Omani and Non-Omani Employees in Managerial, Supervisory and Operative Jobs

To establish the share and distribution of Omani employees across skill levels was of key importance to survey. *Table 4.6* below shows the percentage of Omani employees by skill category.

<table>
<thead>
<tr>
<th>Job Level</th>
<th>All Omanis (%)</th>
<th>All Non-Omanis (%)</th>
<th>Total (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Managerial</td>
<td>6</td>
<td>12</td>
<td>9</td>
</tr>
<tr>
<td>2 Supervisory</td>
<td>14</td>
<td>17</td>
<td>15</td>
</tr>
<tr>
<td>3 Operative</td>
<td>80</td>
<td>71</td>
<td>76</td>
</tr>
<tr>
<td>TOTAL</td>
<td>100</td>
<td>100</td>
<td>100</td>
</tr>
</tbody>
</table>

*Table 4.6* Omani and non-Omani Employees Across Skill Levels

*Table 4.6* shows broadly similar proportions of employees across skill levels for the total tourism labour force, Omani and non-Omani employees. However, the data also shows that Omanis are underrepresented in managerial jobs and slightly overrepresented in lower level operative jobs. Given the relative infancy of the tourism industry in the Sultanate, this is an expected result as neither tourism employees have had the opportunity to gain sufficient experience to reach supervisory and managerial jobs in an industry where experience is highly valued, nor had the tourism education system time to produce high numbers of highly trained graduates who can achieve faster career progression. This is certainly one area which can be positively influenced in the future with a greater integration and development of tourism training and education as part of the sector for the national population.

Nonetheless, this issue is one of great importance and appropriate measures therefore need to be taken in order to facilitate the progression of Omanis into supervisory and managerial positions. The Action Plan presented in *Section 5* of this Report provides recommendations to facilitate this progression through the involvement of key stakeholders.
**Future Expansion Plans**

Tourism companies were asked regarding their future expansion plans. It was found that the majority of firms (83 per cent) plan changes and developments over the next five years. Companies that declared their intentions to expand were asked more detailed questions about the planned expansion. The results are shown in *Figure 4.3* below.

![Future Expansion Plans](image)

**Figure 4.3  Future Expansion Plans**

As *Figure 4.3* illustrates, the majority of companies (61 per cent) are planning to upgrade their existing facilities. This could include upgrading and renovating hotel rooms or re-decorating a restaurant or adding mobility access for less abled travellers. This type of expansion/change does not result in automatic employment creation although improved service levels might be provided given the upgraded facilities and hence likely higher prices charged. The second most cited plan was physical expansion and building new facilities. 42 per cent of tourism firms said yes to this and this suggest figure suggest that about half of all tourism sector companies are planning some sort of physical expansion and hence direct employment creation. 35 per cent of companies stated that they are planning to upgrade their IT system and this implies increased demand for such specialists, both for the upgrade work and the day-to-day running of the more complex computer systems. 22 per cent of companies said they are planning to move into a higher consumer market. This is a significant change as it implies that approximately a quarter of tourism industry companies are planning to improve the service they provide and hence will require upgraded skills from their employees.

This data paints a picture of an expanding industry planning that is upgrading facilities and services. This will bring increased demand for higher skills, particularly in information technology and customer service areas and also continued employment generation.
Job Creation Plans
Tourism firms were also asked directly if they are planning to create new jobs in the next five years. *Table 4.7* below shows the answers to this question.

<table>
<thead>
<tr>
<th></th>
<th>Does your company plan to create new jobs in the next five years?</th>
<th>Yes</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Hotels</td>
<td>69 per cent</td>
</tr>
<tr>
<td>2</td>
<td>Non-Hotels</td>
<td>86 per cent</td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td>77 per cent</td>
</tr>
</tbody>
</table>

*Table 4.7  Job Creation Plans*

As *Table 4.7* shows, the majority (77 per cent) of tourism firms are planning to create new jobs. The propensity to create new jobs was reported higher in the non-hotel sector but care must be taken when interpreting this data as it hides the differences in firm size and its effect on employment creation.

The accommodation sector was asked in detail about their job creation plans. *Table 4.8* below shows the range of jobs the sector is planning to create in a decreasing order, ranging from the jobs where most openings were reported to the one where there are least plans to create new positions.

<table>
<thead>
<tr>
<th>Job Coding</th>
<th>Job Categories</th>
<th>Frequency</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>F&amp;B</td>
<td>41</td>
<td>13</td>
</tr>
<tr>
<td>9</td>
<td>Housekeeping / Services Jobs</td>
<td>40</td>
<td>13</td>
</tr>
<tr>
<td>13</td>
<td>Front Office Jobs</td>
<td>37</td>
<td>12</td>
</tr>
<tr>
<td>4</td>
<td>Sales &amp; Marketing</td>
<td>29</td>
<td>9</td>
</tr>
<tr>
<td>12</td>
<td>Maintenance &amp; Support services</td>
<td>25</td>
<td>8</td>
</tr>
<tr>
<td>15</td>
<td>Managerial Jobs</td>
<td>23</td>
<td>7</td>
</tr>
<tr>
<td>19</td>
<td>Supervisory Jobs</td>
<td>21</td>
<td>7</td>
</tr>
<tr>
<td>10</td>
<td>Culinary / Kitchen</td>
<td>19</td>
<td>6</td>
</tr>
<tr>
<td>2</td>
<td>Accounting / finance</td>
<td>15</td>
<td>5</td>
</tr>
<tr>
<td>3</td>
<td>Administration Jobs</td>
<td>10</td>
<td>3</td>
</tr>
<tr>
<td>18</td>
<td>Skilled Operative</td>
<td>9</td>
<td>3</td>
</tr>
<tr>
<td>14</td>
<td>Human Resources</td>
<td>7</td>
<td>2</td>
</tr>
<tr>
<td>11</td>
<td>Customer Service/guest Relations</td>
<td>7</td>
<td>2</td>
</tr>
<tr>
<td>5</td>
<td>Tour Guiding</td>
<td>6</td>
<td>2</td>
</tr>
<tr>
<td>6</td>
<td>Health Centre Jobs</td>
<td>6</td>
<td>2</td>
</tr>
<tr>
<td>16</td>
<td>P.R.O</td>
<td>5</td>
<td>2</td>
</tr>
<tr>
<td>8</td>
<td>Operational Jobs</td>
<td>5</td>
<td>2</td>
</tr>
<tr>
<td>17</td>
<td>Security</td>
<td>5</td>
<td>2</td>
</tr>
<tr>
<td>7</td>
<td>Drivers</td>
<td>3</td>
<td>1</td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td>313</td>
<td>100</td>
</tr>
</tbody>
</table>

*Table 4.8  Job Creation Plans in the Accommodation Sector*
The data presented in Table 4.8 reveals that the majority of the new jobs will be in the food and beverage (F&B), housekeeping and front office areas and least likely that new jobs will open are for drivers, security personnel, operational jobs. One explanation for this is that companies have already created sufficient numbers of jobs in these areas.

Food and beverage, housekeeping and front office jobs are integral to hotel sector operations and meeting the increasing demand will be a key task in the coming period. It is interesting to note the job creation plans in the sales and marketing areas; the Action Plan will provide recommendation for strengthening training in this field. Non-hotel Firms were also asked the same question and they have reported the following job creation plans (Table 4.9):

<table>
<thead>
<tr>
<th>Job Coding</th>
<th>Job Categories</th>
<th>Frequency</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>4</td>
<td>Sales &amp; Marketing</td>
<td>38</td>
<td>13</td>
</tr>
<tr>
<td>17</td>
<td>Tours &amp; Travel Jobs</td>
<td>35</td>
<td>12</td>
</tr>
<tr>
<td>5</td>
<td>Tour Guiding</td>
<td>24</td>
<td>8</td>
</tr>
<tr>
<td>2</td>
<td>Accounting / Finance</td>
<td>22</td>
<td>7</td>
</tr>
<tr>
<td>18</td>
<td>Managerial Jobs</td>
<td>22</td>
<td>7</td>
</tr>
<tr>
<td>14</td>
<td>Ticketing &amp; Reservations</td>
<td>19</td>
<td>6</td>
</tr>
<tr>
<td>22</td>
<td>Supervisory Jobs</td>
<td>18</td>
<td>6</td>
</tr>
<tr>
<td>9</td>
<td>Operational Jobs</td>
<td>16</td>
<td>5</td>
</tr>
<tr>
<td>12</td>
<td>F&amp;B</td>
<td>26</td>
<td>9</td>
</tr>
<tr>
<td>3</td>
<td>Administration Jobs</td>
<td>13</td>
<td>4</td>
</tr>
<tr>
<td>11</td>
<td>Housekeeping/Services Jobs</td>
<td>10</td>
<td>3</td>
</tr>
<tr>
<td>6</td>
<td>Diving Centre Jobs</td>
<td>9</td>
<td>3</td>
</tr>
<tr>
<td>8</td>
<td>Car Rental Staff</td>
<td>8</td>
<td>3</td>
</tr>
<tr>
<td>15</td>
<td>Maintenance &amp; Support services</td>
<td>8</td>
<td>3</td>
</tr>
<tr>
<td>21</td>
<td>Skilled Operative</td>
<td>7</td>
<td>2</td>
</tr>
<tr>
<td>7</td>
<td>Drivers</td>
<td>6</td>
<td>2</td>
</tr>
<tr>
<td>13</td>
<td>Customer Service/Guest Relations</td>
<td>4</td>
<td>1</td>
</tr>
</tbody>
</table>

Table 4.9 Job Creation Plans for the Non-Hotel Sector

As Table 4.9 outlines, the most popular areas where non-hotel companies are planning to create jobs are in sales and marketing, tours and travel jobs and tour guiding. Similarly to the hotel sector, there are no major plans to open jobs for drivers. Interestingly, companies reported a very low propensity to create jobs in customer service and guest relations areas which would contradict the need of an expanding upscale tourism sector. One explanation is the lack of understanding by the small independent companies about the importance of such jobs for the delivery of high quality tourism product and service.

Similarly to the hotel sector, sales and marketing emerges as a growth area and as mentioned above, training provision needs to cater for this. Tour guiding is also clearly a growth area, together with accounting and finance and ticketing and reservations.
Recruitment of Managers- Hotels
It was of importance to the survey to establish what recruitment methods companies use to recruit at different jobs levels in order to be able suggest ways to facilitate the recruitment of Omanis into tourism jobs. Figure 4.4 show the recruitment methods used to recruit hotel managers in Oman.

![Figure 4.4 Recruitment of Hotel Managers](image)

Figure 4.4 illustrates that the most common recruitment method for managerial jobs in hotels is advertising in newspapers, followed by recruitment through overseas employment agencies. This indicates a high prevalence of recruitment from overseas to managerial jobs. Internal promotions are listed as the third most common method, which is an encouraging as it shows that, given the right qualifications and experience, there is an internal promotion channel in the hotel sector into managerial positions.

Recruitment of Managers - Non-hotel Companies
Similarly to the above, it was also of interest to establish how tourism companies recruit their managers. Figure 4.5 shows the results.

![Figure 4.5 Recruitment of Managers in Non-Hotel Companies](image)

Figure 4.5 Recruitment of Managers in Non-Hotel Companies
As the above graph shows, in non-hotel tourism firms, the most common method is through newspaper advertisement and word-of-mouth referrals. The use of overseas recruitment agencies is less prevalent than for hotel managers and this indicates a higher propensity for the non-hotel sector to recruit managers locally.
Recruitment of Supervisors - Hotels

Figure 4.6 shows the dominant recruitment methods into supervisory jobs in hotels. Supervisory level is an important job level in hotels as this level is an important stepping stone for hotel employees towards managerial jobs.

![Graph showing recruitment methods in hotels](image)

Figure 4.6 Recruitment of Supervisors in Hotels

The survey results determined that supervisors in hotels tend to be recruited via newspaper advertisement, overseas employment agencies and through internal promotion. It is important to note that at this level recruitment from vocational institutions appears as the fourth most commonly used method.

Recruitment of Supervisors - Non-Hotel Companies

Figure 4.7 shows the main recruitment methods for supervisors in non-hotel companies.

![Graph showing recruitment methods in non-hotel companies](image)

Figure 4.7 Recruitment of Supervisors in Non-Hotel Companies

As seen from Figure 4.7, supervisors in non-hotel companies tend to be recruited via newspaper advertisements, word-of-moth referrals, through internal promotion and through on-line job posting. On the one hand, this reflects that recruitment is carried out from within the country, but unlike the hotel sector it also indicates the lack or limited recruitment to this level from the educational and training institutes. This is likely to point towards a shortcoming in this area both in terms of training provision and awareness by industry regarding the available courses and the quality of the graduates. A further possible explanation is that graduates with relevant qualifications are absorbed by other tourism industry sectors that require similar skills.
Recruitment of Skilled Operatives - Hotels

Figure 4.8 below shows the recruitment methods for the recruitment of skilled operatives in the hotel sector. It was hypothesised that as we move down in the skill levels, more recruitment will be conducted locally. It was of particular interest to the survey to examine the extent to which recruitment at this level occurs from the educational institutions.

![Figure 4.8 Recruitment of Skilled Operatives in Hotels](image)

As Figure 4.8 shows, skilled operatives in hotels tend to be recruited via newspaper advertisements, through overseas employment agencies, from vocational educational institutions and through recruitment agencies. This indicates that hotels do recruit at this level from the vocational institutions, but also that for skilled positions such as food and beverage operations and service they do recruit significant numbers of employees from overseas.

Recruitment of Skilled Operatives - Non-Hotels

Figure 4.9 shows the recruitment methods used for skilled operative jobs by the non-hotel sector of the tourism industry.

![Figure 4.9 Recruitment of Skilled Operatives- Non-Hotels](image)

As Figure 4.9 shows, skilled operatives in non-hotel companies tend to be recruited via newspaper advertisements, word-of-mouth referrals and from the education and training institutions. This indicates that most recruitment is conducted locally and demonstrates the employment of graduates at this level from the education and training institutions.
Unskilled Operatives - Hotels

Figure 4.10 shows the recruitment methods used to recruit unskilled operatives by the hotel sector.

![Recruitment Methods](image)

**Figure 4.10 Recruitment of Unskilled Operatives - Hotels**

As seen from Figure 4.10, unskilled operatives in hotels tend to be recruited via newspaper advertisements, word of mouth referrals, overseas employment agencies and from vocational training institutions.

The recruitment of unskilled employees from vocational training institutions suggests a mismatch between training provision and the skills required by the hotels.

Recruitment of Unskilled Operatives - Non-Hotels

*Figure 4.11 shows the recruitment methods used to recruit unskilled operatives by the non-hotel sector of the tourism industry.*

![Recruitment Methods](image)

**Figure 4.11 Recruitment of Unskilled Operative – Non-Hotels**

As Figure 4.11 demonstrates, unskilled operatives in non-hotel companies tend to be recruited via word of mouth referrals, newspaper advertisements, through overseas employment agencies and from vocational education institutions. Similarly to the hotel sector, the recruitment of unskilled employees from vocational institutions signals a mismatch between skills demand and supply.
Ease and Difficulty of Recruitment of Omani Employees for Hotel Jobs

To explore the ease and difficulty to recruit Omani into tourism employment was of high importance to the survey. To this end, tourism firms were asked to state what barriers they face when trying to recruit Omani employees. Figure 4.12 shows the findings.

![Figure 4.12 Barriers to the Recruitment of Omani into Tourism Jobs](chart)

As seen from Figure 4.12, tourism companies overwhelmingly state that the main reason is the shortage of skilled Omanis. The second barrier they find is the reluctance of Omanis to take up tourism jobs and third the lack of skill that Omani jobseekers have.

The survey’s findings indicate that there is a shortage of skilled Omanis and this is combined with the fact that there is some resistance by the Omani population to take up tourism sector jobs. The issue is multifaceted: Due to a reluctance to take up tourism sector jobs, skilled Omanis are likely to choose employment in other sectors. On the other hand, they might not be keen to study tourism and hospitality related subjects if they do not see the industry as an attractive employer. Furthermore, the findings do indicate a possible mismatch between skill provision and the requirements by the tourism sector companies.

Improving the image of the tourism sector as an attractive employer and career destination and the sector’s jobs is a key objective for the action plan as it will encourage Omanis to seek and take up jobs in the sector. Furthermore, strengthening the links between the tourism industry and the education sector is also a priority area for the action plan.
Jobs in the Hotel Sector for which it is difficult to recruit Omani nationals

Accommodation suppliers were asked to list jobs for which they find it difficult to recruit Omani nationals. Table 4.10 below shows the jobs for which the hotel sector finds it difficult to recruit Omani nationals. The table lists jobs in descending order, i.e. jobs which present the most difficulties are shown at the top of the Table.

<table>
<thead>
<tr>
<th>Job Categories</th>
<th>Number of Companies Saying it is difficult to recruit Omani</th>
</tr>
</thead>
<tbody>
<tr>
<td>CULINARY/ KITCHEN JOBS</td>
<td>85</td>
</tr>
<tr>
<td>FOOD &amp; BEVERAGE SERVICE JOBS</td>
<td>80</td>
</tr>
<tr>
<td>MAINTENANCE &amp; SUPPORT SERVICES</td>
<td>71</td>
</tr>
<tr>
<td>HOUSEKEEPING JOBS</td>
<td>53</td>
</tr>
<tr>
<td>MANAGERIAL JOBS</td>
<td>47</td>
</tr>
<tr>
<td>FINANCE JOBS</td>
<td>39</td>
</tr>
<tr>
<td>SALES &amp; MARKETING JOBS</td>
<td>34</td>
</tr>
<tr>
<td>HEALTH CENTRE JOBS</td>
<td>33</td>
</tr>
<tr>
<td>ADMINISTRATION JOBS</td>
<td>30</td>
</tr>
<tr>
<td>FRONT OFFICE JOBS</td>
<td>20</td>
</tr>
<tr>
<td>OTHER JOBS</td>
<td>7</td>
</tr>
</tbody>
</table>

Table 4.10  Recruitment Difficulties for Omani nationals - Hotels

Table 4.10 shows that hotels find it most difficult to recruit Omani nationals for culinary and kitchen jobs, food and beverage service jobs and maintenance and support services. Housekeeping and even managerial posts pose less of a difficulty. Front office jobs are reported as the least difficult to recruit Omani for. When asked why it is difficult to recruit Omanis for the above functional areas, hotels gave the following reasons:

- Culinary/kitchen: Lack of skills and nature and image of the job
- Food and beverage service: Alcohol, lack of skills and image of the job, Image and nature of the job
- Housekeeping: Image and nature of the job
- Finance: Lack of skills and experience, higher salary elsewhere
- Sales and marketing: Lack of skills and experience, higher salary elsewhere
- Administration: Lack of skills and experience
- Health centre: Lack of skills and experience, dress code
- Front office: Lack of skills and experience, working hours
Jobs in the Non-Hotel Sector for Which it is Difficult to Recruit Omanis

Table 4.11 below shows the findings for the same question but from non-hotel sector companies.

<table>
<thead>
<tr>
<th>Job Categories</th>
<th>Frequency</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Managerial Jobs</td>
<td>48</td>
<td>19</td>
</tr>
<tr>
<td>Accounting / Finance</td>
<td>28</td>
<td>11</td>
</tr>
<tr>
<td>Supervisory Jobs</td>
<td>22</td>
<td>9</td>
</tr>
<tr>
<td>Tour Guiding</td>
<td>19</td>
<td>8</td>
</tr>
<tr>
<td>Sales &amp; Marketing</td>
<td>16</td>
<td>6</td>
</tr>
<tr>
<td>Tours &amp; Travel Jobs</td>
<td>14</td>
<td>6</td>
</tr>
<tr>
<td>Maintenance &amp; Support services</td>
<td>13</td>
<td>5</td>
</tr>
<tr>
<td>Ticketing &amp; Reservations</td>
<td>12</td>
<td>5</td>
</tr>
<tr>
<td>F&amp;B</td>
<td>11</td>
<td>4</td>
</tr>
<tr>
<td>Skilled Operative</td>
<td>10</td>
<td>4</td>
</tr>
<tr>
<td>Administration Jobs</td>
<td>9</td>
<td>4</td>
</tr>
<tr>
<td>Diving Centre Jobs</td>
<td>9</td>
<td>4</td>
</tr>
<tr>
<td>Housekeeping/Services Jobs</td>
<td>9</td>
<td>4</td>
</tr>
<tr>
<td>Operational Jobs</td>
<td>8</td>
<td>3</td>
</tr>
<tr>
<td>Culinary / Kitchen</td>
<td>7</td>
<td>3</td>
</tr>
<tr>
<td>Customer Service/Guest Relations</td>
<td>6</td>
<td>2</td>
</tr>
<tr>
<td>front office</td>
<td>4</td>
<td>2</td>
</tr>
<tr>
<td>Drivers</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>Car Rental Staff</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>P.R.O</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Security</td>
<td>1</td>
<td>1</td>
</tr>
</tbody>
</table>

Table 4.11 Recruitment Difficulties for Omanis- Non-Hotels

The survey results show that non-hotel companies find it most difficult to recruit Omanis for managerial, accounting and supervisory jobs. Tour guiding, sales and marketing and tours and travel jobs were also mentioned as posing considerable difficulties. Culinary and kitchen jobs within this sector can be mainly found in the restaurants and not in travel agencies and most other types of businesses. The frequency of mentioning is therefore, comparatively low but when interpreting as this is likely caused by the relative small percentage of restaurant businesses in the sample.
Barriers to the Recruitment of Omani Nationals (all tourism sectors)

All tourism sector companies were asked to state the barriers they saw in the recruitment of Omani nationals to the tourism sector. Table 4.12 below shows the results.

<table>
<thead>
<tr>
<th>Barriers to recruitment of Omani Nationals</th>
<th>Frequency</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Need for qualifications</td>
<td>192</td>
<td>66</td>
</tr>
<tr>
<td>Lack of technical skills</td>
<td>167</td>
<td>58</td>
</tr>
<tr>
<td>Level of efficient performance</td>
<td>147</td>
<td>51</td>
</tr>
<tr>
<td>Unsocial working hours</td>
<td>146</td>
<td>51</td>
</tr>
<tr>
<td>Level of salary</td>
<td>144</td>
<td>50</td>
</tr>
<tr>
<td>Lack of training opportunities</td>
<td>144</td>
<td>50</td>
</tr>
<tr>
<td>Lack of customer service attitude</td>
<td>132</td>
<td>46</td>
</tr>
<tr>
<td>Lack of career prospects</td>
<td>120</td>
<td>42</td>
</tr>
<tr>
<td>Image of service work</td>
<td>119</td>
<td>41</td>
</tr>
<tr>
<td>Family traditions</td>
<td>110</td>
<td>38</td>
</tr>
<tr>
<td>Contact with foreigners</td>
<td>84</td>
<td>29</td>
</tr>
<tr>
<td>Cultural/Religions (e.g. Alcohol, Dress code, Source of income)</td>
<td>82</td>
<td>28</td>
</tr>
<tr>
<td>Other</td>
<td>25</td>
<td>9</td>
</tr>
</tbody>
</table>

Table 4.12 Barriers to the Recruitment of Omani Nationals

As shown above, tourism companies (both hotel and non-hotel companies) stated that the most significant barriers to the recruitment of Omani employees are caused by lack of qualifications, lack of technical skills, lack of efficient performance, unsocial hours, level of salary and lack of training opportunities. These are closely followed by the lack of customer service attitude as perceived by employers, lack of career prospects, the image of service work in the country and family traditions.

The lack of qualifications and skills point again to a mismatch between skills provision and the demands of the market, as well as to the relative infancy of tourism education and training provision. This means that the education and training sector simply has not had adequate time to meet the demands of the market and produce sufficient numbers of qualified Omanis. Additional factors that were highlighted included family traditions and the pejorative image of service sector work.
Barriers to the Recruitment of Omani Nationals by Hotels

Given the scale and the importance of the hotel sector to the country, the survey examined separately the recruitment barriers experienced by the hotels in relation to the recruitment of Omani employees. Table 4.13 shows the findings.

<table>
<thead>
<tr>
<th>Barriers to recruit Omani Nationals</th>
<th>Frequency</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Need for qualifications</td>
<td>94</td>
<td>61</td>
</tr>
<tr>
<td>Lack of technical skills</td>
<td>86</td>
<td>56</td>
</tr>
<tr>
<td>Level of salary</td>
<td>78</td>
<td>51</td>
</tr>
<tr>
<td>Lack of training opportunities</td>
<td>78</td>
<td>51</td>
</tr>
<tr>
<td>Level of efficient performance</td>
<td>78</td>
<td>51</td>
</tr>
<tr>
<td>Lack of customer service attitude</td>
<td>74</td>
<td>48</td>
</tr>
<tr>
<td>Unsocial working hours</td>
<td>73</td>
<td>47</td>
</tr>
<tr>
<td>Image of service work</td>
<td>67</td>
<td>44</td>
</tr>
<tr>
<td>Lack of career prospects</td>
<td>67</td>
<td>44</td>
</tr>
<tr>
<td>Family traditions</td>
<td>63</td>
<td>41</td>
</tr>
<tr>
<td>Cultural/Religions (e.g. Alcohol, Dress code, Source of income)</td>
<td>52</td>
<td>34</td>
</tr>
<tr>
<td>Contact with foreigners</td>
<td>51</td>
<td>33</td>
</tr>
<tr>
<td>Other</td>
<td>14</td>
<td>9</td>
</tr>
</tbody>
</table>

Table 4.13 Barriers to the Recruitment of Omani Nationals in Hotels

As Table 4.13 shows, lack of qualifications and skills, low levels of salaries, lack of training opportunities and the level of efficiency were mentioned as the main barriers by the hotels. The overall findings are very similar to those of the entire industry with no distinct differences.
Recruitment of Non-Omani Staff in Hotels
The survey also explored to what extent it was easy or difficult to recruit non-Omani employees to the sector. The findings are shown in Table 4.14.

<table>
<thead>
<tr>
<th>Job categories</th>
<th>Difficult</th>
<th>Neither/Nor</th>
<th>Easy</th>
</tr>
</thead>
<tbody>
<tr>
<td>FRONT OFFICE JOBS</td>
<td>15</td>
<td>23</td>
<td>103</td>
</tr>
<tr>
<td>HEALTH CENTRE JOBS</td>
<td>12</td>
<td>25</td>
<td>96</td>
</tr>
<tr>
<td>ADMINISTRATION JOBS</td>
<td>10</td>
<td>26</td>
<td>105</td>
</tr>
<tr>
<td>SALES &amp; MARKETING JOBS</td>
<td>9</td>
<td>24</td>
<td>106</td>
</tr>
<tr>
<td>MANAGERIAL JOBS</td>
<td>8</td>
<td>23</td>
<td>110</td>
</tr>
<tr>
<td>MAINTENANCE &amp; SUPPORT SERVICES</td>
<td>7</td>
<td>20</td>
<td>116</td>
</tr>
<tr>
<td>CULINARY/KITCHEN JOBS</td>
<td>6</td>
<td>6</td>
<td>131</td>
</tr>
<tr>
<td>FINANCE JOBS</td>
<td>5</td>
<td>20</td>
<td>113</td>
</tr>
<tr>
<td>FOOD &amp; BEVERAGE SERVICE JOBS</td>
<td>3</td>
<td>8</td>
<td>132</td>
</tr>
<tr>
<td>HOUSEKEEPING JOBS</td>
<td>2</td>
<td>15</td>
<td>130</td>
</tr>
<tr>
<td>OTHER JOBS</td>
<td>2</td>
<td>9</td>
<td>76</td>
</tr>
</tbody>
</table>

Table 4.14  Ease and Difficulty of Recruiting Non-Omanis in Hotels

*Table 4.14 shows that, overall, the recruitment of non-Omanis did not pose any particular difficulties. There is clearly sufficient supply from overseas.*
Skill Gaps for Omanis (in all sectors)

One of the most important areas of the survey was to try to establish what skill gaps exist in relation to Omani employees. Table 4.15 shows the results.

<table>
<thead>
<tr>
<th>Work Skills</th>
<th>Yes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Foreign languages</td>
<td>176</td>
</tr>
<tr>
<td>Customer service/handling customer problems</td>
<td>128</td>
</tr>
<tr>
<td>Managerial skills</td>
<td>108</td>
</tr>
<tr>
<td>International standard food preparation skills</td>
<td>98</td>
</tr>
<tr>
<td>IT skills</td>
<td>95</td>
</tr>
<tr>
<td>Finance/accounting</td>
<td>94</td>
</tr>
<tr>
<td>Marketing/sales</td>
<td>92</td>
</tr>
<tr>
<td>Food preparation skills</td>
<td>92</td>
</tr>
<tr>
<td>Cleaning labour</td>
<td>85</td>
</tr>
<tr>
<td>Food and beverage service</td>
<td>80</td>
</tr>
<tr>
<td>Maintenance engineering</td>
<td>78</td>
</tr>
<tr>
<td>Heavy manual labour</td>
<td>62</td>
</tr>
<tr>
<td>Ticketing/reservation</td>
<td>61</td>
</tr>
<tr>
<td>Sports instruction (e.g.: golf, tennis, diving)</td>
<td>31</td>
</tr>
<tr>
<td>Driving</td>
<td>23</td>
</tr>
<tr>
<td>Fitness instruction</td>
<td>18</td>
</tr>
<tr>
<td>Other</td>
<td>7</td>
</tr>
</tbody>
</table>

Table 4.15 Skill Gaps for Omani Employees

As seen from Table 4.15, the most pressing are foreign language skills, customer service skills and managerial skills. International standard food preparation, IT, finance and accounting, marketing and sales skills follow closely as the principal skills gaps.

Closing the skill gaps is the role of education and training institutions and also for the companies themselves through on-the-job training and through continuous professional development activities. Recommendations for closing the skills gaps are included in the Action Plan.
Satisfaction with Omani Employees
Tourism sector firms were asked to rate their level of satisfaction with Omani employees. Figure 4.13 shows the findings.

As depicted in Figure 4.13, employers expressed a high level of satisfaction with Omani employees in terms of their personal grooming and appearance. They are satisfied but to a lesser extent with their work ethics, customer service skills and their understanding of cultures. Companies expressed a dissatisfaction with the level of punctuality of their Omani employees.

The results suggest that there is a need for education and training providers to instil in their students a culture of punctuality and professionalism, both of which have been highlighted by employers. There is also a need for training in the customer service area. Customer service was already identified as a skills gap and thus the Action Plan will suggest appropriate measures.
Key barriers to the Promotion of Omani Employees into Managerial and Supervisory Jobs

Employers were asked what they believed were the main barriers to the promotion of Omani employees to managerial and supervisory jobs. *Table 4.16* shows the results.

<table>
<thead>
<tr>
<th>key barriers</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lack of work experience</td>
<td>204</td>
<td>85</td>
</tr>
<tr>
<td>Lack of qualifications</td>
<td>163</td>
<td>126</td>
</tr>
<tr>
<td>Other</td>
<td>51</td>
<td>238</td>
</tr>
</tbody>
</table>

*Table 4.16 Barriers to Promoting Omanis into Managerial and Supervisory Jobs*

*Table 4.16* shows that when asked what the key barriers are for promoting more Omani into these jobs, that companies identified lack of work experience as the most significant barrier, followed by the lack of qualifications. From the two, lack of work experience comes out as a slightly more relevant issue – this reflects the importance the industry gives to work experience. The findings are significant for the Action Plan in that in order to increase the number and proportion of Omani in managerial and supervisory jobs, the Action Plan has to suggest ways both to help Omani to gain work experience and to obtain qualifications that are valued by industry. It must be noted that given the infancy of the tourism industry in Oman, the population did not have sufficient time to gain neither the necessary qualifications nor the required work experience.

**Recommendations to Increase the Proportion of Omanis in Managerial and Supervisory Jobs**

Companies were asked to suggest ways in which more Omani can be promoted to managerial and supervisory jobs. *Figure 4.14* shows the findings.

*Figure 4.14 How to Promote Omani to Managerial and Supervisory Jobs*

As seen from *Figure 4.14*, companies would like to see the development of the tourism education and training system in the Sultanate and suggest increased Government funding for skills training. In-house training by tourism sector companies is also mentioned as a solution.
Minimum Wage Levels for Omani Employees
Companies were asked what they thought about the minimum salaries set by the Government (Please see Section 3.5 for details on the minimum salaries). Figure 4.15 below show the results.

![Figure 4.15 Opinions Regarding the Minimum Salaries set for Omani Employees](image)

As seen from Figure 4.15, tourism sector companies believe that the upper end of the scale, in other words salaries for university graduates and diploma holders is too high, at the lower levels it is about appropriate. It is worth noting that about a quarter of companies believe that there should be no minimum salaries set at all.

Training Provision and Training Budgets in the Tourism Sector
Having a dedicated training budget is an important indicator of the level of upskilling and continuous professional development undertaken by industry. Tourism sector companies where asked whether they had a dedicated training budget. Figure 4.16 shows the findings.

![Figure 4.16 Existence of Training Budgets](image)

Figure 4.16 shows that 76 per cent of tourism sector companies do not have a dedicated training budget. This implies that in a large percentage of companies, training is either ad-hoc, conducted without dedicated budget or is non-existent. Companies that stated that they do have a training budget were asked what percentage of the training budget represented of their annual staffing cost. The answers ranged from 1-45 per cent of annual staffing cost, with the average calculated as 11.45 per cent (the mode or most typical figure is 5 per cent).
Similarly, companies were asked what form of training they provided to their employees. *Figure 4.17* shows the results.

![Figure 4.17 Training Provision to Employees](image)

*Figure 4.17 Training Provision to Employees*

*Figure 4.17* shows that the majority of companies do not provide training for their employees. This is in line with the findings earlier regarding the low prevalence of training budgets in the sector. Those companies who do provide tend to use in-house training instructors. Relatively few companies (17 per cent) send their staff for training to a College or other training institution.

The survey also explored if companies have a dedicated training provision or programme specifically designed for their Omani employees. The results showed that the majority of companies (71 per cent) do not have a dedicated training programme for Omani employees.

![Figure 4.18 Training of Omani Employees in 2009](image)

*Figure 4.18 Training of Omani Employees in 2009*

*Figure 4.18* shows that in the sample, 112 companies out of the 289 companies provided training for Omani employees and they trained 2,302 Omani employees in 2009.
Staff Turnover and Retention

Staff turnover is typically measured by organizations using the following formula on a monthly or annual basis:

\[
\text{Total number of leavers over period} \times 100 \quad \text{Average total number employed over period}
\]

The total figure includes all leavers, even people who left involuntarily due to dismissal, redundancy or retirement.

There is no set level of employee turnover that is regarded as negative or positive for organisations and its evaluation is subjective and depends on the type of labour market in which the companies operate. Where it is relatively easy to find and train new employees quickly and at relatively little cost it is possible to sustain high quality levels of service provision despite having a high turnover rate. On the other hand, where skills are relatively scarce and where recruitment is costly or where it takes several weeks to fill a vacancy, turnover is likely to be problematic for the companies. Also, some employee turnover positively benefits organisations when for example an employee with poor performance is replaced by a more productive employee, and can happen when a senior retirement allows the promotion or acquisition of welcome ‘fresh blood’. Moderate levels of staff turnover can also help to reduce staff costs in organisations where business levels are unpredictable month on month, such as in the tourism sector which faces seasonality issues.

For this reason, tourism sector companies were asked if staff turnover posed a problem for them. 46 per cent of hotels and 40 per cent of non-hotel companies stated that staff turnover was a problem with Omani employees. These figures were lower, at 25 per cent and 27 per cent, respectively, for non-Omani employees.

When asked why Omanis leave, companies stated a number of reasons (Figure 4.19).

![Figure 4.19 Reasons for Staff Turnover](image)

As seen from Figure 4.19, seeking improved salary and benefits, together with a move to work in the public sector were stated as the most important reasons. These are followed by a wish to seek jobs with better career prospects, jobs with better social status and
jobs with improved working conditions. Low salaries in tourism put the sector at comparative disadvantage with other industries and this finding is in line with the official average salaries across industrial sectors reported in Section 3.5.

Improving the comparative attractiveness of tourism sector employment is a key task for the next decade and the Action Plan will address this issue.

**IMPLICATIONS FOR THE ACTION PLAN**

- The monitoring of Omanisation levels should move to a standard classification of tourism sectors and this classification should take into account the broad spectrum of tourism sector in line with the UNWTO Tourism Satellite Account system and should include the new and emerging tourism sectors.

- Omani employees are underrepresented in managerial and supervisory jobs and slightly overrepresented in operative level jobs. There is a need to address this imbalance and help nationals to reach supervisory and managerial jobs in the sector.

- Job creation is planned by industry in food and beverage, housekeeping, front office, sales and marketing, tour guiding, finance and ticketing and reservations areas and training provision needs to cater for this.

- Recruitment from vocational and educational institutions tends to happen at the lower skill categories and not for managerial jobs and there is recruitment from these institutions into unskilled jobs which indicates a mismatch between skills demand and supply.

- Salaries, working hours, lack of training and lack of skills emerge as the key barriers to the recruitment of Omani employees into tourism sector employment and these areas should be addressed.

- Employers report high level of satisfaction with Omani employees in terms of their appearance but indicate shortcomings in terms of punctuality and professionalism, cultural understanding and customer service areas.

- The majority of companies do not have dedicated training budgets and training tends to be undertaken on an *ad hoc* basis.

- Omani employees leave the tourism sector for employment in other industries because of salary issues, the attraction of working in the public sector and for lack of perceived career prospects in tourism.
4.3 SURVEY OF HUMAN RESOURCE (HR) DIRECTORS

The sample
Interviews with HR Directors were carried out between May and June 2010 by the UNWTO project team. A total of 40 managers were interviewed, all responsible for the human resource functions in 5 travel agencies, 2 restaurants, one tourism attraction and 10 hotels each employing over 100 people and 12 smaller hotels employing less than 100 people. The interviews took place in Muscat and 7 other regions. In total, the survey consisted of 10 Omani and 30 non-Omani HR Directors/Company Directors.

Interview Analysis Framework and Procedure
The analytical approach adopted was based on initial classifications of the data and was coded accordingly. The classifications, which form the specific objectives of the methodology, were:

- Evidence of written policies and procedures relating to recruitment and training.
- Evidence of the general ‘state of play’ in relation to the equality of treatment and opportunity between Omani and non-Omani employees.
- Evidence of how the social and cultural context affected the attractiveness of the industry to Omani citizens.
- Evidence of how the Omanisation programme was progressing, whether opinions were favourable, and whether targets were realistic.
- Evidence of how the regulatory framework was understood by industry practitioners.
- Evidence of how industry perceived the role of Government in development of tourism.
- Opinions regarding recommendation for future actions.

Data was analysed in terms of convergence and divergence around these objectives and an assessment was made of the magnitude of the opinions expressed.

Survey Results
Written Policies and Budgets
As had been expected, the existence of clear hiring standards, recruitment strategies and training budgets were confined to large establishments (typically hotels with more than 100 employees) and those with international connections. The majority of small establishments knew what they wanted in terms of human resource processes but achieve that without formalization, in other words without written HR policies such as recruitment and promotion policies and criteria. It is worth noting that the Omanisation policy and the minimum wage regulation gave the recruitment process a framework in which recruiters would work without too much formalisation in the form of written HR policies. The amount of training reflected in the interviews was fairly low but the need for greater efforts in this respect was voiced by most of the HR Directors. The small travel agencies were exceptional in that they had formal training procedures and in some cases, a dedicated training budget.

Recruitment of Omanis
The most preferred recruitment methods were ‘word of mouth’ and ‘advertisement in local newspapers’. Only a quarter of the sample had used the Ministry of Manpower job matching recruitment service and they reported that it offered unsuitable people. Some
of the HR Directors preferred to poach staff from retail outlets as a way of pre-testing English ability. The findings here are in line with those from the previous questionnaire survey in that there was limited evidence of recruitment from the tourism education and training institutions. Indeed, this reflects a weak matching of skills provision and skills needs by the industry.

Equality of Treatment
Although there was unanimous agreement in the sample that Omani and Non-Omani employees should be treated the same in their terms of conditions and everyday treatment, the current structure of employment placed Omani workers in different occupations to Non-Omanis. At present, Omani employees are placed in administration, security and indirect services (e.g. drivers gardeners, etc.), but not in supervisory and in direct service jobs. There were very few examples of employing Omans in food and beverage areas although there were examples of Omans working as receptionists in hotels. Omani managerial staff were found only in two of the larger hotels.

In reviewing the minimum wage and specified skill categories most HR Directors believed that salaries paid to Omans and Non-Omans were about equal when accommodation and travel allowances for Non-Omans were factored in. However, all the HRM managers saw that the current system worked well for companies but less well for employees. There is conflict within the attitudes of the HR Directors because on the one hand they see the minimum wage as sufficient and fair given the lack of skills of the Omani applicants but on the other hand they thought that the minimum wage should increase because it contributed to the low prestige of tourism sector work in the country. This conundrum carries weight in the attitudes towards Omani workers. It is a realistic finding that employers would like to keep salaries low but it is also interesting to note that they recognise that the low salaries are not beneficial in the long run as they negatively affect the image of the industry and it will hinder recruitment, mainly the recruitment of Omans into tourism sector jobs. The tourism firm questionnaire survey showed also related findings in that it indicated that employers see the lower end of salaries too low and the minimum salaries set for the graduates too high.

The question that arises is whether tourism sector companies are making sufficient efforts to reward and motivate employees through non-salary measures such as training provision, comfortable shifts and effective management style. HR Directors were aware that the formality of the salary system prevented the labour market from being too volatile.

Barrier to Omani Employment

Social and Cultural Barriers
The hotel and restaurant sample identified working with alcohol as a deterrent to working in the industry. The implication was that Omans would not work in food and beverage departments even if they are working in hotels. Only two of the hotels reported employing Omani nationals in food service (but not in bar work). The problem of working with alcohol was recognised as only being part of a general disapproval of tourism work by family culture. The preference by Omani workers for morning shifts and insistence on statutory holidays were seen as impediments that were currently accommodated but were seen as impediments to future employment.

The social and cultural barriers to tourism sector, and particularly, to hotel sector employment are highly significant as these not only act as a barrier and impediment for
taking up employment but these also have a wider implication for the overall image of
the entire tourism sector within the Omani population. The findings here are in line with
the tourism firm questionnaire survey and with the results of the focus group meetings –
the social and cultural issues and within these particularly the issue of alcohol is highly
significant and will have overarching implications in terms of local support for the
development of tourism in the Sultanate.

The issue of alcohol is particularly impacting on hotels and restaurants and the
Government needs to consider how to align religious and cultural beliefs with the
operational needs of the sector. Furthermore, students, prospective students and their
parents can be made aware of the range of jobs that hotels offer that do not involve the
handling of alcohol such as jobs in the sales and marketing departments, finance and
accounting department and front desk.

Economic Barriers to Employment
There was universal agreement that the general level of pay was a competitive
disadvantage and contributed to the poor image of the industry. A number of HR
Directors saw no point in recruiting graduates because of the competition from other
sectors with higher salaries. The study found evidence of only two companies trying to
recruit graduates. It was felt by the HR Directors that at all levels of skill pay rates were a
deterrent to attracting people into the industry. It was interesting to note that the large
employers found the minimum wage useful as base to pay higher competitive rates in
the knowledge that smaller companies paid rates that moved only slightly above the
minimum.

The attraction of graduates into tourism can be and should be increased through
strengthened graduate training schemes and internships and through offering
accelerated career progression to the most talented graduates.

The Attitude and Skill Problem
Many of the HR Directors highlighted the poor attitude to work of Omani employees and
their lack of punctuality. They saw this as being detrimental to supervisory relations and
to promotion opportunities. Two HR Directors noted that attitudes to tourism employment
were better in country rather than city areas. Of equal importance is the clear skill
differential of Omani and Non-Omani recruits. The industry uses agencies to contract
Non-Omani skilled and semi-skilled labour. The Omani recruits had no technical or social
skill in hospitality and tourism and had to be trained by Non-Omani supervisors on the
job. There is clear gap in the culinary and service areas which at present is covered by
imported skilled labour. The HRM Managers highlighted IT skills and Language skills as
a current shortage and a need for the future. They considered that it would be feasible to
improve this area within the education system.

Image of the Industry
Opinion was unanimous in saying that the image of the industry was poor and that low
pay contributed to that issue. However, some mature opinions were expressed that as
Omani citizens knew nothing about the industry its attractiveness would improve when it
had grown to be visible to the general population.

Training Needs
There was complete consensus on which skills need to be addressed. The interviews
identified four areas where the skill gap needs to be closed:
• Basic hospitality skills
• IT
• Languages (particularly English)
• Managerial skills
• Customer service skills

The findings here are in line with the tourism firm questionnaire survey. The main notable difference is the absence of the mentioning of finance and accounting skills in this survey.

Relationship with Regulations and Institutions
In broad terms the opinion of the interviewees was that the Ministry of Tourism was concerned with the development of projects but did not address the issue of marketing the destination. Whilst some companies were content with the level of communication with Government bodies others expressed the opinion that they would like to see more and closer communication and partnership with Government bodies and they expect more government help with funding of training.

Overall Perspective and Conclusions
A number of issues arise from these interviews which complement and inform the survey study. The most significant of which concerns the support for the Omanisation policy.

Omanisation Policy
The interviews revealed a considerable convergence of favourable opinion towards the intentions of the Omanisation programme supported by the view that the official targets were only a little too ambitious. The spirit and logic of the programme was never questioned.

The Present Makes no Provision for the Future
The most important conclusion from this part of the study comes in the form of a warning in that the interviews reveal a tourism industry, much like any mature tourism industry, that is, managing in a steady-state manner handling problems as they occur. However, this steady-state functioning ignores the fact that the industry is required to change and grow which needs more planning and development thinking and investment. There is no sense of development in the policies, practices and attitudes found in these HRM managers. Some HR Directors talked of planning future training or planning to have a training budget but there was little tangible evidence of this presented during the interviews.

The HR Directors were unaware of the implications of growth for competition; increased competitiveness follows from expansion of the industry. There appears to be no awareness that expansion of the industry will bring both recruitment and labour turnover issues. Their views on what constituted a labour turnover problem were the one area where they diverted from common industry opinion.
**Barriers to Tourism Employment**
Despite a realistic assessment of the social barriers affecting human resources issues, there was in many cases an optimistic view that over time some of these barriers would fall away or at least not become obstacles to supplying tourism services. The implication of this is that a learning curve will be activated when the industry is fully up and running. It was felt that actually seeing tourists as a permanent feature of life would promote greater interest in employment. This optimism has to confront the fact that growth requires the skills gap to be reduced.

**Who is Responsible for Solving Skills Shortage?**
There was some ambiguity in relation to training. The HR managers accepted that companies needed to train but felt that it was up to the government through its education institutions to provide more skilled staff. The survey found that there were no specific programmes to develop managerial Omani staff. Only five establishments had Omani supervisors. One notable suggestion was that as Omanis were unfamiliar with the tourism sector potential managers should take part in some form of training outside the country in mature tourism industries.

**Human Capital of HR Managers**
The survey showed that HR Mangers do not necessarily think strategically and do not necessarily have the knowledge of the full range of latest HR practices and approaches. This raises the issue and need for continuous professional development programmes, specifically tailored for the needs of the industry. These can be best delivered through either the education and training institutes such as OTC and/or later through professional associations.
IMPLICATIONS FOR THE ACTION PLAN

- Concerns were raised by HR Directors about the efficiency of the Ministry of Manpower job matching recruitment service.

- HR Directors confirmed that Omanis tend to be in administration, security and indirect service jobs (drivers and gardeners) but not in supervisory and in direct service jobs, especially not in food and beverage areas.

- HR Directors tend to agree that minimum wages should increase in order to improve the prestige of tourism sector employment.

- Hotels and restaurants stated that alcohol is a deterrent to working in the sector and the issue of alcohol contributes to the overall disapproval of tourism employment by families.

- Omami employees prefer morning shifts and statutory holidays and the HR Directors see this as an impediment to their normal operation.

- There is universal agreement amongst HR Directors that the level of pay is a competitive disadvantage and it contributes to the poor image of the industry.

- HR Directors highlighted their concern with work attitude and punctuality of Omani employees and saw this as a detriment to supervisory relations and promotion opportunities.

- There is a clear skills gap in the culinary and service areas and it is currently covered by foreign labour.

- HR Directors also highlighted the need for strengthened training in IT, language skills, hospitality skills, managerial skills and customer service skills.

- HR Directors showed considerably favourable opinions towards the Omanisation Policy but thought current targets were slightly too ambitious.

- The interviews revealed limited training provision by employers.

- HR Directors thought Omanis are often unfamiliar with the tourism sector and that potential managers should take part in some sort of training abroad in more mature tourism industries.

- HR Director pointed out that there is a need for increased dialogue between Government and employers.
4.4 SURVEY OF TOURISM EMPLOYEES

Introduction
The main objective of the survey was to gather the views of tourism employees regarding their career history and plans, motives for taking up tourism employment and the level of satisfaction with working in the tourism sector. The survey also examined the extent of family support for tourism sector employment and explored current tourism sector employees’ propensity to stay/leave the sector. An important objective of the survey was the collection of sample salaries in tourism in order to supplement the scarcely available secondary data on tourism industry salaries.

The questionnaire survey of tourism employees includes responses from 292 tourism sector employees, of whom 38 per cent were Omanis Nationals. Of the total sample, 74 per cent of the respondents were male employees, 26 per cent female employees. The gender distribution of the sample is illustrated in Figure 4.20.

![Figure 4.20 Gender Distribution of the Tourism Employee Survey Sample](image)

Data was obtained from six regions and Governorates and the sample distribution is shown in Figure 4.21 below.

![Figure 4.21 Regional Distribution of Tourism Employee Survey Sample](image)

As seen from Figure 4.21 above, 45 per cent of the responses came from the Muscat region, 18 per cent from the Dhofar region, 13 per cent from A’Sharqiyah region, 10 per
cent from Musandam, 8 per cent from Al Batinah and 7 per cent from A'Dhakliyah region. This shows a good regional representation and the sample sufficiently represents the different regions and Governorates.

**Educational Background of Tourism Employees**

Tourism employees were asked to state their highest level of education. *Figure 4.22* below shows the highest level of qualification for both Omani and non-Omani employees.

![Figure 4.22 Highest Level of Education of Tourism Employees](image)

As seen from *Figure 2.22* above, the sample contains employees with the whole spectrum of qualifications. The most dominant qualification amongst Omani employees in the sample is school level certificate, followed by diploma. It is noticeable that there no Omani respondent in the sample with post-graduate qualification (this, in tourism could only have been obtained from abroad). Amongst the non-Omani employees, the Bachelor degree and diploma level qualifications are the predominant qualifications possessed by current employees.

**Promotion**

Respondents were asked to state if they had been promoted by their current employers at least once. It is interesting the note that 45 per cent of Omani employees reported that they have been promoted, as opposed to 37 per cent of non-Omani employees. This contradicts with earlier findings that suggested that Omani employees leave the industry because of lack of promotion prospects.

**Work in another Industry Prior to Tourism**

It was of interest to the survey to establish whether there was a difference between Omani and non-Omani employees in their career history, i.e. whether they have worked in another industry before taking up a tourism sector job. The survey found no major differences, with 11 per cent Omani and 16 per cent non-Omani employees saying they had worked in another industry before tourism. This point is illustrated in *Figure 4.23*. 

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Figure 4.23 Work in an other Industry Before Current Tourism Sector Employment

Those who did work in another industry prior to tourism were asked to state the industry they worked in before their current tourism sector employment. The results are shown in Figure 4.24.

Figure 4.24 Industry Before Tourism

As Figure 4.24 depicts, the most common inter-industry route to enter tourism employment is from wholesale and retail trade, the education sector, transportation, health and social services. This corresponds with earlier findings from the HR Directors survey, as the retail sector was also one of their recruitment sources because of English language skills.
Salaries
Given the paucity of official data on salaries in the tourism sector (Section 3.5), it was of paramount importance to the survey to collect salary information from tourism employees. The survey recorded job titles and the monthly salary for each respondent and this data was used for the analysis. Table 4.17 shows the average, minimum and highest monthly salaries for Omani and non-Omani employees working in the tourism sector.

<table>
<thead>
<tr>
<th>Salary by Nationality</th>
<th>Average Salary (OMR)</th>
<th>Lowest Salary (OMR)</th>
<th>Highest Salary (OMR)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Omani</td>
<td>328</td>
<td>150</td>
<td>1200</td>
</tr>
<tr>
<td>Non-Omani</td>
<td>321</td>
<td>60</td>
<td>4500</td>
</tr>
</tbody>
</table>

Table 4.17  Average, minimum and highest Salaries in the Tourism Sector, Omani and Non-Omani Employees

Table 4.17 shows that the average salary for Omani and non-Omani samples was calculated at OMR 328 and OMR 321, respectively. Although the average salaries are similar between the two groups, what is also evident from the data is that the salaries for non-Omani employees show a wide variation. Furthermore, the highest salary by a non-Omani respondent is 3.75 times higher than the highest salary recorded for an Omani employee. Also, it is worth noting the existence of the very low salaries (60 OMR lowest) recorded at the lower end of the non-Omani sample. It must be noted that the minimum salaries only apply to Omani employees and this policy needs to be reviewed.

The average salary data is in line with the official figures reported in Section 3.5 by the Ministry of National Economy and confirm that average salaries in the tourism sector are below the national average of OMR 426.
Salaries in Key Tourism Occupations

The survey collected and calculated detailed salary information for key tourism occupations. The salaries are shown in Table 4.18 below.

<table>
<thead>
<tr>
<th>Salary by Job Categories</th>
<th>Average (OMR)</th>
<th>Lowest Salary (OMR)</th>
<th>Highest Salary (OMR)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Managerial Jobs</td>
<td>678</td>
<td>220</td>
<td>4500</td>
</tr>
<tr>
<td>Sales &amp; Marketing</td>
<td>448</td>
<td>240</td>
<td>624</td>
</tr>
<tr>
<td>Culinary / Kitchen</td>
<td>396</td>
<td>200</td>
<td>800</td>
</tr>
<tr>
<td>Administration Jobs</td>
<td>347</td>
<td>190</td>
<td>1115</td>
</tr>
<tr>
<td>Accounting / Finance</td>
<td>343</td>
<td>180</td>
<td>719</td>
</tr>
<tr>
<td>Tours &amp; Travel Jobs</td>
<td>343</td>
<td>180</td>
<td>692</td>
</tr>
<tr>
<td>P.R.O</td>
<td>300</td>
<td>300</td>
<td>300</td>
</tr>
<tr>
<td>Ticketing &amp; Reservations</td>
<td>263</td>
<td>120</td>
<td>700</td>
</tr>
<tr>
<td>Operational Jobs</td>
<td>253</td>
<td>165</td>
<td>455</td>
</tr>
<tr>
<td>Front office</td>
<td>233</td>
<td>110</td>
<td>640</td>
</tr>
<tr>
<td>Maintenance &amp; Support services</td>
<td>217</td>
<td>120</td>
<td>550</td>
</tr>
<tr>
<td>Tour Guiding</td>
<td>207</td>
<td>170</td>
<td>250</td>
</tr>
<tr>
<td>Customer Service/Guest Relations</td>
<td>205</td>
<td>190</td>
<td>220</td>
</tr>
<tr>
<td>Housekeeping/Services Jobs</td>
<td>191</td>
<td>60</td>
<td>1500</td>
</tr>
<tr>
<td>Drivers</td>
<td>187</td>
<td>170</td>
<td>220</td>
</tr>
<tr>
<td>Food and Beverage (F&amp;B)</td>
<td>120</td>
<td>80</td>
<td>200</td>
</tr>
<tr>
<td>Security</td>
<td>190</td>
<td>170</td>
<td>210</td>
</tr>
<tr>
<td>Skilled Operative (a skilled job that requires formal vocational education)</td>
<td>284</td>
<td>100</td>
<td>678</td>
</tr>
<tr>
<td>Supervisory Jobs</td>
<td>299</td>
<td>130</td>
<td>628</td>
</tr>
</tbody>
</table>

Table 4.18 Salaries in Key Tourism Occupations

As seen from Table 4.18, the highest average salaries were reported in managerial jobs, sales and marketing, culinary jobs. It is worth noting that average salaries are below the national average of OMR 426 for most occupations, apart from managerial jobs and jobs in the sales and marketing area.

It is interesting to note that in some occupations the salary range is very wide. In other categories such as food and beverage services, security and customer service/guest relations, the salary structure is flat. Overall, the lowest salaries are recorded in housekeeping and food and beverage jobs.

The data demonstrates that managerial jobs tend to be well paid in tourism and it is one of the objectives of the Action Plan to encourage and facilitate the advancement of Omani employees into managerial jobs.
**Benefits Received**

Tourism sector employees were asked what benefits they receive from the company where they work. Benefits vary greatly and can include a wide range of monetary or non-monetary benefits but it would typically range from accommodation provision or allowance, transportation allowance or actual transportation, food allowance or meals, health insurance, air tickets, holidays, end of service gratuity and uniforms. *Table 4.19* shows the benefits received by both Omani and non-Omani employees.

<table>
<thead>
<tr>
<th>Benefits</th>
<th>Omani</th>
<th>Non-Omani</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Yes (%)</td>
<td>No (%)</td>
</tr>
<tr>
<td><strong>Accommodation</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>a. Allowance</td>
<td>65</td>
<td>35</td>
</tr>
<tr>
<td>b. Furnished Accommodation</td>
<td>15</td>
<td>85</td>
</tr>
<tr>
<td><strong>Transport</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>c. Allowance</td>
<td>65</td>
<td>35</td>
</tr>
<tr>
<td>d. Actual Transport</td>
<td>15</td>
<td>85</td>
</tr>
<tr>
<td><strong>Food</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>e. Allowance</td>
<td>15</td>
<td>85</td>
</tr>
<tr>
<td>f. Meals</td>
<td>57</td>
<td>43</td>
</tr>
<tr>
<td><strong>Health Insurance</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>g. Individual</td>
<td>43</td>
<td>57</td>
</tr>
<tr>
<td>h. Family</td>
<td>9</td>
<td>91</td>
</tr>
<tr>
<td><strong>Air Tickets</strong></td>
<td>7</td>
<td>93</td>
</tr>
<tr>
<td><strong>Holidays</strong></td>
<td>55</td>
<td>45</td>
</tr>
<tr>
<td><strong>Uniforms</strong></td>
<td>31</td>
<td>69</td>
</tr>
<tr>
<td><strong>End of Service Gratuity</strong></td>
<td>35</td>
<td>65</td>
</tr>
</tbody>
</table>

*Table 4.19   Benefits Received*

As *Table 4.19* depicts, Omani employees tend to receive accommodation allowance, transport allowance, meals, individual health insurance and holidays. Non-Omani employees receive furnished accommodation, transport, meals, individual health insurance, air tickets, holidays, uniforms and end of service gratuity. Overall, non-Omani employees do receive a more comprehensive list of benefits than their Omani counterparts.
Reasons for Working in Tourism by Omani Employees

Employees were asked what motivated them to take up a tourism sector job. Figure 4.25 shows the answers from Omani employees.

![Motives for Working in Tourism for Omani Employees](image)

As seen from Figure 4.25, the most common reason was the wish to use foreign language skills, followed by the aim to work in good working conditions. The fact that tourism is a growth industry was often mentioned and also the desire to have an interesting job.

The findings underline the fact that the tourism industry attracts people with foreign language skills and that it does offer jobs that are interesting and varied. People with a disposition for these kinds of jobs are attracted to tourism sector jobs and recruiters to tourism education institutions and any future awareness campaign should emphasise this in order to attract the right calibre students and employees into the sector.

Satisfaction with Working in Tourism by Omani Employees

Omani employees were asked to rate their satisfaction with some key aspects of their job in the tourism sector. Figure 4.26 shows the level of satisfaction across six aspects of the job: salary and benefits package, working in the tourism sector, training, working environment, promotion prospects and working hours.

![Satisfaction with Aspects of the Job](image)
Figure 4.26 shows that Omani employees tend to show relatively high levels of overall satisfaction with working in tourism, the working environment and working hours. The highest level of dissatisfaction was reported with salaries and benefit package and promotion prospects.

**Leaving Tourism Sector Employment – Omani Employees**

When asked if they would consider leaving tourism for another industry, 72 per cent of Omanis said no and 28 per cent yes. The industries stated as the likely job destinations were government, banking, and the telecommunications sector. This is in line with the findings of the previous surveys.

When asked about the reasons for wanting to leave tourism, Omani employees stated that salary considerations, followed by long and unsociable working hours are the main reasons to seek alternative employment opportunities (Figure 4.27)

![Figure 4.27 Reasons for Leaving Tourism](image)

Working in the tourism industry, particularly the hotel sector, is characterised by often long and unsociable working hours and this is often dictated by the operational needs of the sector, such as the fact that hotel services are frequently required to be available 24 hour a day and that often the peak periods of tourism coincide with times of holidays and festivities. The low salary issue is confirmed again, in line with the other surveys.
Family Support for Working in Tourism

An important question to current tourism sector employees is the extent to which their family supports them in their decision to work in the tourism industry. Without family support or approval young Omanis are unlikely to take up tourism sector jobs and if they do the social implications would disadvantage them considerably. Figure 4.28 below shows the level of family support for Omani and non-Omani employees.

**Figure 4.28 Level of Family Support**

*Figure 4.28 illustrates that the majority (69 per cent) of employees enjoy their families’ support. This of course also means that those who would not enjoy family support are less likely to take up a tourism sector job. Some 19 per cent of employees say that their family does not support but accept them working in tourism. Only a small percentage of respondents report that their families are against them working in the tourism sector. It must be pointed out still, 30 per cent of employees work in the sector without the full approval of their families.*

**Recommendations for Keeping Omanis in Tourism Employment**

Omani employees were asked what would help keep them working in the tourism sector. *Figure 4.29 shows the responses.*

As seen from *Figure 4.29, 28 per cent of the sample said that training and education provision would help, 20 per cent of respondents advocated higher salaries, 8 per cent of respondents advocate...*
thought that more awareness about opportunities in the industry would be helpful and 7 per cent suggested training in communication and language skills.

These recommendations are in line with the findings of the other surveys.

**IMPLICATIONS FOR THE ACTION PLAN**

- Non-Omani employees in tourism tend to have higher level qualifications than their Omani counterparts.

- The survey confirms that average salaries in tourism tend to be below the national average.

- The survey revealed a wide range of salaries and some very high salaries.

- Average salaries are highest in managerial jobs, sales and marketing areas and lowest in food and beverage and security jobs.

- Omani employees are attracted to the sector by the use of foreign language skills.

- Omani employees show satisfaction with a number of aspects of the job but dissatisfaction was reported with salaries and benefits.

- Two thirds of Omani employees are planning to stay working in tourism, those who are considering moving to another sector list public sector jobs, banking and telecommunications as the most attractive sectors to move into. The reasons for this are primarily due to salary considerations and the working hours.

Arising from the above,

- There is a need to review minimum salaries in the sector in order to increase the comparative attractiveness of tourism sector employment.

- There is a need to find ways to better match the expectations of Omani employees regarding shifts and working hours and the operational needs of the industry.
4.5 FOCUS GROUP SURVEY WITH OMANI POPULATION

Introduction
In this Section the key findings are presented from a series of focus groups with Omani people (adults and students) that were conducted as part of the survey. The main objective of the survey was to obtain first hand information regarding the Omani population’s views of tourism as an economic sector and tourism as an employer. Student groups were probed about their knowledge of tourism industry and careers, their attitudes towards taking up jobs in the tourism sector and about their overall career objectives and plans. The project team conducted focus group meetings in Muscat and the Batinah and Musandam regions. Regions were selected based on their current share from tourism development and on the basis of the feasibility of conducting the focus group meetings. Focus group meetings were conducted with the following groups:

- Musandam Men’s Group (8 men)
- Musandam Women’s Group (15 women)
- Batinah Women’s Group (5 women)
- Groups of students from Oman Tourism College, Muscat and from Sultan Qaboos University, Muscat (20 students in total, male and female)

Attitudes towards Tourism Development
All groups and respondents showed a high level of support for developing tourism in Oman and thought it would bring good employment and business opportunities to the country. They were unanimous in wanting not only tourism to be developed generally in the Sultanate but also in their own region/place of residence. When asked about travel experiences abroad, very few of the participants in the focus groups had had extensive travel experience and if they had, the main destination mentioned was to the neighbouring United Arab Emirates. This perhaps underlines—as has been alluded to earlier in this report- the degree to which tourism is very much a nascent phenomenon for many sections of society in Oman and there has been little engagement thus far with different forms of tourism. Notwithstanding, it is certainly very encouraging that there is broad grassroots support for tourism within these constituencies that can be built upon in the future.

Attitudes to Working in Tourism
The general public in Oman sees tourism as an industry that can benefit the community economically. There was agreement in that tourism will create job opportunities and it can be an important source of income for the local communities. All groups expressed overall favourable opinions regarding the employment opportunities in tourism and thought employment creation is and should be the prime reason for developing tourism in the country.

When the discussion moved on to their own family, opinions divided greatly. A few respondents said they had family members working in tourism but the majority expressed strong views that they would not like their own children, especially daughters to work in tourism. Particularly unfavourable views were expressed regarding work in hotels. Furthermore, and damagingly to the industry, there was a tendency by the groups to equate all tourism employment with working in hotels. There was agreement across all groups that hotel work has a negative image in the country. The reasons mentioned was alcohol and inappropriate behaviour, shift work and long and unsociable working hours and low pay. There was a perceived lack of knowledge of career opportunities in tourism. Although there was general support for working in tourism, Omani people
expressed a number of concerns regarding tourism sector employment, particularly regarding the long and unsociable working hours, low salaries and the lack of health insurance in the private sector.

**Studying Tourism (Students at Oman Tourism College and Sultan Qaboos University - 20 participants, age group 17-20 years)**

Students studying in tourism education institutes expressed highly favourable views regarding the tourism industry. They saw tourism as an industry with strong growth potential in Oman and an industry with interesting jobs. Students expressed a good knowledge of tourism as an industry and as a sector for employment.

When asked about future career plans, students explained that they will be looking for jobs with good career prospects and, particularly, with high salaries. They are aware of the fact that their qualification will allow them to seek employment in various industrial sectors, including non-tourism employment.

Whilst they expressed they wish to find a job in tourism, they also showed interest in other sectors and they key factor in their decision making is likely to be the starting salary.

Hotel employment received strongly unfavourable views, including amongst students studying hotel management. These views were expressed both by male and female students and hardly any student expressed a strong wish to seek or showed willingness to accept a job in the hotel sector. The most popular sectors for employment within the tourism industry were: airlines, airports, car rental companies and travel agencies. Hotel employment carries a strong negative image because of dealing with alcohol and undesirable social behaviour and this image extends even to work in functional department such as marketing and finance where there is no direct contact with alcohol.

When asked about family support for studying and working in tourism, current students explained that their families are in support of their studies. Differences were found between Muscat and Salalah, especially regarding family views of female employment in tourism. It was interesting to note that a high proportion of students, both male and female, are aiming to set up their own tourism business.

**Regional Issues**

The above analysis presented the overall findings of the survey, what follows here is the presentation of the specific findings from the regional focus group discussions.
Musandam Men’s Group (Khasab and Dibba Business Communities) 8 male participants, tourism business owners and managers

Musandam\textsuperscript{12}, separated from the rest of Oman by the United Arab Emirates, is the most northerly part of the Sultanate. Due to its geographical position and mountainous terrain it was isolated from the rest of Oman and the region developed at its own pace. Graded roads cut across the mountains have now made it more accessible. Fjords, or khors, created by fragmented rock stretching our into the sea and massive overshadowing cliffs give it the name of “Norway of Arabia”. The capital of Musandam, Khasab, has 18,000 inhabitants. Musandam’s tourism offering is currently geared towards the adventure tourists. The remoteness of the region and its sparse population make for a “get-away-from-it-all” holiday. The industry is currently specialising on dhow sailing, snorkeling and diving and attracting the cultural tourist to visit Khasab castle. Khasab is located 500 kilometers from Muscat. Access is by sea and via the regional airport in Khasab and access by land was virtually impossible until a modern coast road was built. This road now allows fast access from the United Arab Emirates, making Khasab a popular weekend destination for people living in the Emirates. Khasab also has a number of modern shopping areas with imported Irani goods and locally created pottery, and a few hotels, including the Khasab Hotel and Golden Tulip Hotel, which sits on a cliff overlooking the gulf. Dibba sometimes spelled Diba or Daba, is a coastal region at the northeastern tip of the UAE/Oman peninsula on the Gulf of Oman. It is politically divided into three parts: Dibba Al-Fujairah, ruled by the Emirate of Fujairah, ruled by the Governorate of Musandam, Oman.

The two focus groups included 8 male members of the tourism business community. Members of the group said tourism is expected to be a promising activity in Musandam: the sea, the mountains and the heritage sites attract increasing numbers of tourists. However, they thought the Ministry of Tourism should look at providing the important facilities in the attractions for the tourists and should be managing the port to serve both the fishermen and the tourist boats (daws). Opinions were expressed that training should be provided in Musandam in skills such as; foreign languages (such as English, German, Italian and French) as travel agencies and dive centres are looking for this skill. Furthermore, the community thought that it is important to provide training in administration, marketing, and reservation systems.

The group agreed that tourism can become one of the largest economic sectors in Musandam. However, in order to maximize the benefits for the local community, it’s important to provide the Omani with the required training and the community thought that the cost of the training could be shared between the government and the private sector.

The group stated that many Omani employees in tourism sector leave the industry for government jobs such as jobs in the army. One of the main reasons for this is the availability of bank loans for those who work in the army (usually the banks refuse to give loans to those who work in tourism).

\textsuperscript{12} http://www.msaoman.com/aboutoman.php
The group reported that the basic salary for Omanis in the tourism sector is 165 OMR plus benefits and the tips. The group sees that tourism currently offers three type of jobs: Boat captains, drivers and administrative jobs. It was interesting to note that the group did not mention hotel sector employment which indicates that it is not regarded as attractive for the local community.

The community expressed an acceptance of tourism development in Diba and stated that they would support their children to work in tourism if it gives them a good salary but the group expressed the view that the present salary which is around 250 OMR is regarded as insufficient for the area. The group was urging the Ministry to help increasing the income from tourism activities for the local community. Furthermore, the group suggested that the Ministry should help training Omanis to get better positions in tourism industry. However, they said, training the people from Diba in Muscat is difficult, because it requires the cost and the need to be away from the family. The group thought it would be helpful to have an educational or a training centre in Musandam.

An important issues raised by the community members from Diba and confirmed by a Manager from the Six Senses Resort (which is located in Zighi –Diba), is that most of the Omanis who are working in the resort can not have bank loans as the banks refuse to give them loans (which help them to get married, build a house, or buy cars). This results in personal strategies to work in the resort or and the tourism sector only until they find alternative occupations with a chance to obtain bank loans.

Finally, it is pertinent to mention that the community accepts tourism and tourists if the tourists respect the community and do not appear to be improperly dressed and their behaviour does not offend local cultures.

**Musandam Women’s Group**

**15 female participants, small business owners, wives of tourism entrepreneurs and housewives**

The women’s community looks at the tourism industry as a good sector and they welcome it to Musandam. The women community expressed the view that although the tourism industry is large in Musandam, they do not see the benefits from it. They suggest that in order to gain benefits from tourism activities, a training centre for the locals is required. They say, introducing institutions in Musandam for teaching tourism for the local communities will help the graduate to have specialized skills for working in tourism, and that might help increasing the salary which will attract Omani citizens to work in tourism.

The women community also talked about the importance of easing the process for licensing tourism projects, which will help to open tourism business in Musandam.

Besides that, they highlighted the important role of the Ministry of Tourism to raise awareness about the importance of the tourism sector in creating new sources of income and to help the community to set up their own businesses with the support of the Ministry and the financial organizations for having soft loans.
Women’s group, Batinah
5 female participants, housewives

The Batinah Region occupies an important location on the coast of Gulf of Oman. It lies between Khatmat Malahah in the north and Ras AL Hamra in the south and confined between the Al Hajar Mountains in the west and the Gulf of Oman in the east. Al Batinah Region contains the largest number of wilayat numbering twelve: Sohar, Ar Rustaq, Shinas, Liwa, Saham, Al Khaburah, As Suwayq, Nakhal, Wadi Al Maawil, Al Awabi, Al Musanaah, Barka. As Suwayq (Suaiq) is considered as the biggest walyah in the Batinah Region. Sohar City is one of the Regional centers of the region.

The majority of women in Batinah Region still do not have much information about tourism. Young females have more information about tourism, however, their perceptions about tourism tends to be negative. One of the ladies in the group has a daughter was accepted to study tourism at a Tourism Institution, she went for few weeks then she didn’t want to continue with her study at the institution as she thought that jobs in tourism don not suit females in the Omani society. Another participant has one of her sons graduated with a tourism qualification and was offered a job at the institution but he did not accept it and moved to work in another company. The participant explained that her son said that he did not want to work in tourism because he did not feel proud to tell his friends that he works in tourism.

Generally, the group expressed concerns about studying and working in tourism especially in the case of young females for whom staying away from the home town is not acceptable for many families. Apart from the social issues, a concern for both males and females is that working away from home means expenses such as accommodation, transportation but the salary in this sector is too low to cover for this.

The group also expressed the view that that tourism is all about hotels and hotels have an unfavourable reputation in the Omani society. The main reasons for this were identified as follows. Firstly, most families do not like their children to work in a hotel because they do not like the idea of mixing between males and females especially in hotels. Although they know that there are many jobs outside of tourism where males and females work together such as in hospitals or universities, but jobs in the tourism industry do not have a good reputation. Improper behaviour by guest and the notion of alcohol is also a deterrent for hotel sector employment.

Furthermore, the group expressed the view that there are not many jobs available in the tourism industry, and they do not have much information about the different tourism projects in the Sultanate. In case jobs are available, the types of jobs offered in this industry are of poor image, and considered to be unattractive jobs.

The role of tourism educational institutions is not clear for the public: people do not have sufficient information about the tourism educational institutions in terms of the length of the study, what are the different majors, how much it cost to study, and what are the opportunities of jobs in this sector after graduating from these institutions.

Working hours in the sector and the shifts are not very acceptable in some families especially for females. The group admitted that there are other jobs that require shifts and unsocial working hours but they considered those jobs different from the tourism industry, without being able to give clear reasons or explanations for the differences.
The group showed a positive perception about work, whatever the job is, and mentioned that working is better than being idle. They considered tour guide as a good job for males, but it does not suit females as they have to stay with the tourist groups away from home. Young females think that it is not worth to study for years then work in the hospitality sector; however their perception about hospitality is about serving food only. Females in general do not mind to allow their children to study what they like and work anywhere and in any firm.

The group raised the issue of the cost of expatriates and the perception is that employers prefer to employ the expatriate because he or she can be offered a lower salary than what the Omani employee would be paid.

Working in the airlines is also not acceptable by some of Omanis because females have to spend nights in some destinations, and they do not have the option to refuse to serve alcohol, which they have in hotels. However, they think that saying working for an airline sounds better than working in hotels.

The group brought up some suggestions. Firstly, they suggest that lectures should be delivered in the different regions to increase the awareness of local communities about tourism and for people to understand what jobs are available in the industry, what are the different sectors and sub sectors of tourism and what type of qualifications exist in tourism. The group thought that the Media should increase their contribution in increasing the awareness of people about tourism. The group also thought that it would be beneficial to establish tourism educational institutions in the regions in order to better serve the regions.

**IMPLICATIONS FOR THE ACTION PLAN**

- The Omani people expressed high level of support for developing tourism in the Sultanate and through that tourism will bring valuable employment opportunities for the communities.

- The employment opportunities tourism offers often are unclear to the local populations.

- The survey showed that tourism and tourism employment often has a negative image and the image is heavily influenced by the image of hotel work and gender issues.

- Salaries in tourism are generally viewed as too low.

- Certain tourism occupations are viewed as unsuitable for females especially those with unsociable hours and those requiring overnight stay away from the family.

- Students at tourism education institutions have an overall favourable view of the tourism industry but are not fully committed to seeking employment in the sector. Their career choice is heavily influenced by salary considerations.

- Students view employment in hotels as unattractive, including those who currently study on a hospitality programme.
4.6 SURVEY OF TOURISM EDUCATION AND TRAINING PROVIDERS

Introduction

This Section addresses the current provision of tourism education and training and the results of the survey will be presented and discussed. The key topics that were covered included tourism programmes, curricula, institution capacity and capacity utilisation, staffing, student applications, student employability and industry links.

Qualifications Framework

The current framework was approved by the OAS Board in 2005 and it is currently under review. Oman’s National Qualifications Framework recognizes six levels of education, 4 at undergraduate and 2 at postgraduate level.

Formal education starts at the age of 6 when students start 10 years of basic education which is then followed by two years of 2 years of post-basic education. Basic education is divided into two cycles (4 and 6 years).

<table>
<thead>
<tr>
<th>Undergraduate Level</th>
<th>Normal Minimum Time</th>
<th>Award Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>Level 1</td>
<td>1 Year</td>
<td>Certificate</td>
</tr>
<tr>
<td>Level 2</td>
<td>2 Years</td>
<td>Diploma (includes Associate Degree)</td>
</tr>
<tr>
<td>Level 3</td>
<td>3 Years</td>
<td>Advanced Diploma (includes Scottish Degree)</td>
</tr>
<tr>
<td>Level 4</td>
<td>4 Years</td>
<td>Bachelor’s Degree</td>
</tr>
<tr>
<td></td>
<td>1 Year at Level 4</td>
<td>Graduate Diploma</td>
</tr>
<tr>
<td>Postgraduate Level</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Level 5</td>
<td>1-2 Years after Bachelor’s</td>
<td>Master’s Degree</td>
</tr>
<tr>
<td></td>
<td>1 Year at Level 5</td>
<td>Postgraduate Diploma</td>
</tr>
<tr>
<td>Level 6</td>
<td>2-4 Years after Master’s</td>
<td>Doctorate</td>
</tr>
</tbody>
</table>

Table 4.20 Qualifications Framework

Source: Oman Accreditation Council¹³

Note: Currently a Bachelor’s Degree Programme accredited by OAC has a minimum duration of 4 years. Programmes accredited abroad are currently exempt from this rule and can be of a 3 year duration.

Higher Education and Training Competitiveness
The World Economic Forum Global Competitiveness Report 2009-2010 ranks Oman’s Higher Education and Training as follows:

5.01 Secondary enrolment* 60
5.02 Tertiary enrolment* 77
5.03 Quality of the educational system 54
5.04 Quality of math and science education 71
5.05 Quality of management schools 110
5.06 Internet access in schools 48
5.07 Local availability of research and training services 94
5.08 Extent of staff training 53


As seen from the figures above, the country did relatively well in terms the extent of staff training (ranked as 53) and the education system ranked as 54. The local availability of research and training services and the quality of management schools was ranked fairly low, at 94 and 110, respectively.

Tourism Education and Training Provision
Tourism and hospitality education and training in Oman is currently provided up to Level 4 on the OAC qualifications framework. The highest level of qualification available in tourism and hospitality is a Bachelor’s degree. Currently there is no provision of Masters level education in the field of tourism and hospitality in the Sultanate, although tentative plans exist at Sultan Qaboos University to start such a programme in the near future.

University level education is provided by the following institutions:
- Sultan Qaboos University
- Colleges of Applied Science
- Oman Tourism College
- German University of Technology in Oman
- Majan College
- Sur University College

Vocation Training is provided by three institutions:
- Oman Tourism College
- National Hospitality Institute
- Khimji College

It is worth noting that Oman Tourism College provides both university level education and vocational training, including short courses.
Tourism Education and Training in Oman – In Development Stage

Tourism education provision is a relatively new activity in the Sultanate and institutions had so far only a relatively short period of time to develop their programmes.

2001 was the beginning of tourism education in Oman, since it was in this year that a Bachelor of Arts (B.A.) program in tourism was started at Sultan Qaboos University. At the outset the curriculum was mostly focused on theoretical approach and later the approach moved into a semi-practical approach. The same year was also the birth of the first dedicated Tourism and Hospitality institution in Oman, established in cooperation with Austrian Institutions with more focus on the hotel operation and vocational practical approaches.

Later the number of institutions offering tourism programmes increased, albeit with very conservative and cautious approach. The lack of practical resources, lower fees paid by government to private institutions, poor attitude towards tourism as a future career among parents and students hindered many institutions in expanding their programme.

With limited number of students not exceeding 22 students, Majan College launched its first programme in tourism in partnership with Luton University in England. In 2008 the Ministry of Higher Education started offering tourism in two of its Colleges of Applied Sciences (CAS) (Ibri & Al Rustaq). In 2008, Sur University College (SUC) started offering Bachelor’s programme in business with specialization in Tourism. Both institutions have only theoretical approach and no practical facilities available. In 2007 German University in Oman (GUtech) launched a tourism bachelor programme with 7 students. In 2008 there were 2 enrolments, increased into 15 students in 2010 on Foundation course which indicates a potential take-off of the programme.

In 2010, two new universities gained Ministry of Higher Education approval. The University of Buraimi in the northern region of Oman launched its programmes with three colleges and tourism and leisure management is among the offered Bachelor programmes. The second new university is A’ Sharqiyah University and will also offer tourism programmes in cooperation with Oklahoma University in United States.

Language of Tuition

The language of teaching varies from one institution to another but most courses in the field of tourism are taught in English. In Sultan Qaboos University the language of tuition is mixed with 40 per cent in Arabic and 60 per cent in English. English is the only medium of instruction at Oman Tourism College, GUtech, Al Buraim University and Majan College. German and French are also offered as a compulsory second language at OTC. German is the second language offered by GUtech. The medium of instruction at SAS and CAS are Arabic and English, majority of subjects are taught in Arabic. All vocational courses in tourism and hospitality are taught in English at Oman Tourism College. National Hospitality Institute offers some vocational courses in Arabic.
Programmes and Programme Titles
The institutions surveyed provide the following programmes in the field of tourism and hospitality:

- **Sultan Qaboos University**
  Bachelor of Arts (BA) in Tourism with Specialisation in Tourism Management
  Bachelor of Arts (BA) in Tourism with Specialisation in Hospitality Management
  Bachelor of Arts (BA) in Tourism with a specialization in Tourism Guidance (Tour Guiding)

- **Oman Tourism College**
  International Diploma in Tourism and Hospitality Management (2 years + foundation)
  Professional Certificate in Tour Guiding (1 year + foundation)
  Professional Certificate in Front Office and House Keeping (1 year + foundation)
  Professional Certificate in Culinary (1 year + foundation)
  Professional Certificate in Service and Restaurant Management (1 year + foundation)
  Travel Management (1 year course)

  Oman Tourism College offers a number of short courses in hospitality, tourism, travel areas and languages:
  Culinary
  Service and restaurant management
  House keeping
  Front office
  Tourism Business
  Travel management and IATA programmes
  Food safety and hygiene
  Business languages: English, French & German
  Customer services/ Guest relationship

- **Oman Tourism College is planning the following Programmes to start in 2011**
  Bachelor in Tourism Management
  Bachelor in Hospitality Management
  Bachelor in Event Management

- **Colleges of Applied Sciences**
  Bachelor of Arts (BA) in International Business Administration, (BIBA) with majors in: Tourism

- **GU tech**
  Bachelor of Science (BSc) in Sustainable Tourism and Regional Development

- **Gulf College**
  Bachelor of Arts (BA) in Travel and Tourism Management

- **Sur University College**
  Bachelor of Business Administration in Hotel Management and Tourism
- **Majan University College**  
  Bachelor of Arts (BA) in Business Administration with pathway in Tourism

- **Al Buraimi University**  
  Bachelor of Tourism and Leisure Management

- **National Hospitality Institute**  
  Diploma in International Hotel Management, length 2 years  
  Diploma level Modular Hotel Management programme for existing tourism employees, 8 weeks per module  
  Certificate in Vocational Courses 6-8 months  
  Diploma, Cabin Crew 6 months

As the data shows, there is currently a good and increasing supply of programmes in tourism and hospitality areas ranging from general tourism and hospitality programmes to joint business programmes with a tourism specialisation or pathway, leisure management. Oman Tourism College and National Hospitality Institute offer a wide range of vocational short courses in tourism and hospitality related areas. All these programmes are offered at the right level, apart from the BA in Tour Guiding at Sultan Qaboos University which somewhat misplaced and is recommended to be removed from the programme portfolio. It is interesting to note the BSc programme in Sustainable Tourism and Regional Development at GuTech. This is a highly innovative programme and grounded in the regional and sustainable development area.

**Programmes and Faculties**

The survey revealed that university programmes are hosted by a number of different departments but typically housed within the business and management faculties, such as:

- Sultan Qaboos University  
  College of Arts and Social Sciences
- Colleges of Applied Sciences  
  Department of International Business  
  Administration
- GUtech  
  Faculty of Economics and Planning
- Gulf College  
  Faculty of Business Studies
- Majan College  
  Faculty of Business Management
- Sur University College  
  Business Department
- Al Buraimi University  
  Faculty of Business

As seen from the above, five out of seven university level programmes are run within business departments, one is within arts and social sciences and one programme is run by a faculty of economics and planning. Oman scores low on the quality of business and management schools according to the World Economic Forum Global Competitiveness Report 2009-2010 and this weakens the position of tourism programmes and likely impact on the perception of the quality of programmes. A comprehensive review of the curriculum is necessary to provide in depth comparative evaluation of the tourism curriculum and the Action Plan will make appropriate recommendations for this.
Affiliation with Foreign Institutions

According to information from the Ministry of Higher Education, all private colleges are required to be affiliated or have a kind of academic cooperation with foreign institutions. The affiliation can take a form of joint degrees, franchise agreements and accreditation. The Ministry expresses a preference of arrangements such as joint degree programmes when there is strong and clear involvement by the running of programmes by the foreign educational institute. In other words, private colleges are hosting foreign programmes and there is a significant direct involvement of foreign instructors. Accordingly, institutions providing tourism programmes are affiliated with the following foreign institutions:

<table>
<thead>
<tr>
<th>College</th>
<th>Partner</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oman Tourism College</td>
<td>Austrian Education Consortium consisting of International Institute of Tourism Management (ITM) and the international Management Centre (IMC) University of Applied Science.</td>
</tr>
<tr>
<td>GUTech</td>
<td>RWTH Aachen University, Germany</td>
</tr>
<tr>
<td>Gulf College</td>
<td>Staffordshire University, UK</td>
</tr>
<tr>
<td>Majan College</td>
<td>University of Bedfordshire, UK</td>
</tr>
<tr>
<td>Sur University College</td>
<td>Bond University in Australia</td>
</tr>
<tr>
<td>University of Al Buraimi</td>
<td>International Consortium Includes Vienna Univ., Vienna Technical University, University of Applied Science in Austria (IMC) and others.</td>
</tr>
</tbody>
</table>

Sultan Qaboos University runs its programme independently in line with the autonomy granted to the institution that was established in 1986.

Foreign affiliation and particularly the choice of the foreign institutional partner is a strategic issue for the country and goes beyond marketing considerations as the institutions are effectively running their programmes based on the curriculum of the foreign partner. It is therefore recommended for institutions to actively seek partnerships, collaboration or affiliation from recognised foreign universities with reputable international certifications where common links and cooperation can be established, particularly in tourism programmes.
### Student Numbers and Capacity Utilization

The survey collected information from the surveyed institutions on the number of students graduating and regarding capacity utilization. The results are shown in Table 4.21 below.

<table>
<thead>
<tr>
<th>Programme</th>
<th>Number of student graduating in 2010</th>
<th>Capacity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sultan Qaboos University</td>
<td>68 in total across the three programmes. All are Omani students, of which 15 are female students</td>
<td>Student numbers will be capped at 40 in 2011</td>
</tr>
<tr>
<td>Bachelor of Arts (BA) Tourism with Specialisation in Tourism Management</td>
<td>41 students</td>
<td></td>
</tr>
<tr>
<td>Bachelor of Arts (BA) Tourism with Specialisation in Hospitality Management</td>
<td>25 students</td>
<td></td>
</tr>
<tr>
<td>Bachelor of Arts (BA) Tourism with a specialization in Tourism Guidance (Tour Guiding)</td>
<td>2 students</td>
<td></td>
</tr>
<tr>
<td>Colleges of Applied Sciences</td>
<td>59 (36 male and 23 female)</td>
<td></td>
</tr>
<tr>
<td>Bachelor (BA) in International Business Administration, (BIBA) with majors in: Tourism Management Hospitality Management</td>
<td></td>
<td></td>
</tr>
<tr>
<td>GUTech</td>
<td>First batch of students will graduate in 2012 (6 students)</td>
<td></td>
</tr>
<tr>
<td>Bachelor of Science (BSc) Sustainable Tourism and Regional Development</td>
<td>Capacity not utilized</td>
<td></td>
</tr>
<tr>
<td>Oman Tourism College</td>
<td>82</td>
<td></td>
</tr>
<tr>
<td>International Diploma in Tourism and Hospitality Management Professional Certificate in Tour Guiding Professional Certificate in Front Office and House Keeping</td>
<td>21</td>
<td></td>
</tr>
<tr>
<td></td>
<td>44</td>
<td></td>
</tr>
<tr>
<td></td>
<td>There is further capacity</td>
<td></td>
</tr>
</tbody>
</table>
Professional Certificate in Culinary  
Professional Certificate in Service and Restaurant Management  
Travel Management  
Short courses

| Majan College | Bachelor of Arts (BA) Business Administration with pathway in Tourism | 3 students | Capacity not utilized |
| Gulf College | Bachelor of Arts (BA) Travel and Tourism Management | 55 | There is further capacity |
| National Hospitality Institute | Diploma in International Hotel Management | 15 | 45 |
| | Diploma level Modular Hotel Management programme for existing tourism employees | 2 Omani 15 Non-Omani | 45 |
| | Certificate in Vocational Courses | 120 Omani 0 Non-Omani | 500 |
| | Diploma, Cabin Crew 6 months | 30 | 30 |

Table 4.21 Tourism and Hospitality Programmes and Capacity Utilization

As seen from Table 4.21, the largest cohorts of students in tourism and hospitality programmes are at Oman Tourism, Sultan Qaboos University and Colleges of Applied Science. Majan College and the GuTech currently operate with small student numbers.

Of the vocational training in hospitality National Hospitality Institute and Oman Tourism College graduate the highest number of graduates. These two institutions are more specialised in providing short courses, particularly in the field of food and beverage areas, hotel operation and cabin crew.

The interviews conducted during this survey revealed that virtually all institutions run the tourism and hospitality programmes below capacity levels. Universities identified sluggish student intake as the main reason, the training sector voiced issues of bottlenecks with the current funding mechanism of students. Sultan Qaboos University confirmed that they would be able to significantly increase student intake if there was demand.
Oman Tourism College and the National Hospitality Institute stated that they are running at less than 60% of their capacities. The lack of awareness toward work in hotel industry, salaries, decrease of government fund and support to short courses, bureaucracy and long procedures in finishing the training programmes and the decrease of the training hours are among the short comings. In addition, the majority of Tourism firms are also hesitant in investing in HR development and the budget allocated by most tourism firms for training is very low according to one of the HR managers at one of the five star hotels interviewed by the project.

Sultan Qaboos University is the only institution currently planning to cap student intake, from the current 68 to 40 students in the academic year of 2010/2011 as the institution is planning to focus on curriculum development and quality. In the future, the University can expand student intake but one constraint to increased student numbers is the limited availability of local academics. This, in the short run can be overcome through international recruitment.

GuTech and Majan college currently operate with very small student numbers and have excess capacity to cater for increased student numbers.

Considerable excess capacity was reported by the National Hospitality Institute. The Institute has trained approximately 1200 students in the last 5 years and would be able to double this in the next 5 years. Furthermore, the Institute has a complete double shift capacity in the current building and this indicates that an extra 500 students per year could be trained at the Institute.

Oman Tourism College also increased the number of students from 102 in 2003-4 to more than 730 students in 2010-2011. The number of graduates in different academic and vocational courses increased from 44 in 2003-4 into 379 in 2005-6 and expected to exceed 440 graduates by the end of 2010-11 academic years.

Professional Placement/Training
All institutions offer some form of practical training to students. Sultan Qaboos University, GU-tech and other higher education providers are more in term of research than in practical training. The Programme in Sultan Qaboos University includes 2 internships of 300 hours each. The internships are placed between semester 4 and 5 and 6 and 7. According to the university’s data, students were placed for training with the following companies in July 2010: The training coordinator visits students on placement.

- Al Bustan Palace Hotel
- Muscat Intercontinental
- The Chedi Muscat
- Ramada Hotel Muscat
- Al Shafaq Club
- Oman Air
- Sohar Beach Hotel
- OMAC
- Diplomatic Club
- Park Inn Muscat
- Salalah Marriott
As seen from the list of placements, student training is dominated by placements in the hospitality sector and other sector companies are considerably underrepresented.

Concerning internships, all Diploma students at Oman Tourism College must finish 16 weeks of internship programmes conducted under the supervision of the college in the tourism industry divided into 4 areas: kitchen, restaurants, housekeeping and front office. The international diploma in Tourism and hospitality includes theoretical studies (60-65 per cent) and practical (30-35 per cent).

The professional certificate programme students undergo up to 8 weeks internship according to their programme specialities. More than 32 field trips are designed for Tour guide students and they should mandatorily complete them before they graduate. The professional certificates programmes are 70% practical and 30% theoretical.

The survey showed that Oman Tourism College provided 24 hours transport services to students and were distributed among 53 firms in 2009. The majority of them are hotels (mostly 3-5 stars hotels), travel agencies & tour operators, and few of them are airlines. Geographically, majority of students completed their internship training in Muscat, and a good number of students completed their internship in Salalah. Few of them were in Musandam and Sohar.

With the exception of Ministry of Defense sponsored students, all sponsored students that are trained at OTC are doing their internships with their future employers.

**Student Employability**

All institutions are concerned with student employability; however, limited information is available on graduate work destinations. Robust systems are needed for the monitoring of student employment destinations and only a few institutions could provide factual data on the job destinations of their students. The study could not obtain exact figures from Sultan Qaboos University or other tourism institutions about the graduates’ employability.

The situation has been recognised by the Ministry of Higher Education who last year initiated a new research project in order to track student employability. A team of academics from higher education institutions were assigned the task under the supervision of the Ministry.

Training institutions seem to be more successful at monitoring student work destinations. The National Hospitality Institute reported that they monitor the students for 1 year after they have finished the training and produce reports on this. Their analysis finds that in general there is a 65/70 per cent retention after 1 year with the same company and about 90 per cent retention is some form of employment. The institute also reported that their students tend to get jobs in the hotels but increasing numbers find jobs in the airline sector. Crown plaza, Grand Hyatt, Intercontinental, Shangri La, Holiday Inn, Industrial catering companies, Chedi hotel, Al Bustan Palace hotel, Park Inn, Ibis, Sheraton. Oman Air, Emirates airline were mentioned as key employers.
Oman Tourism College has updated its database on its graduates work destinations and a dedicated section is assigned to help the students and strengthen the relation with industry. The college reported that out of 934 students trained in culinary and service areas, more than 550 joined Ministry of Defence catering outlets as cooks and waiters, the rest were trained and employed by the hotel industry particularly Shangri-La, Intercontinental hotel group in Oman, Grand Hyatt, Chedi, Radisson Blue Rami, Hilton and many others.

Banks, telecommunication sector, event management firms, airlines were the highest employers of Oman Tourism College Diploma Graduates (some 170). Few of the diploma students joined hotel industry (some 24 graduates). A good number of students gained places with travel and tour operators firms (34). Ministry of tourism, Royal Court Affairs, ISS and OTC are among other organisations that employed the diploma graduates.

Only a small number of graduates from the front office and house keeping programme join the hotel industry. Majority of them were employed as receptionists or administration assistants in many firms such as telecommunication companies, travel agencies, call centres, catering clubs and other industries. Salaries, attitudes towards work in hotel operation are among the main reasons for students not taking up employment in the hotel sector. In addition, the Ministry of Manpower has not yet established a payment system for the holders of professional certificates.

A majority of tour guide course graduates are either working in a full time capacity in the tourism industry or work as freelancers.

GuTech has not graduated any students yet from the tourism programme but is hoping that their graduates will find jobs at the Integrated Tourism Complexes, with consultancy companies and at the public sector.

Data regarding the employability of other institutions graduates were not found by this study.

**Expansion Plans**

In view of the current sluggish student intake, institutions do not have major expansion plans but are ready to expand if demand picks up. Currently, two institutions are building new campuses, GUtech and Gulf College. The construction of the new Gulf College campus has commenced and the College is planning to move into the new facility in 2012.

GUtech currently does not have student accommodation and this limits the extent to which it can cater for the regions outside of Oman. A new campus development is currently at the planning stage and once that is built and in operation the university can attract students from outside of Muscat. GuTechs planned expansion is best illustrated by the fact that the University current total of 190 students (of which some 10 are registered on the tourism programme) to some 2,000 students by 2017.

Buraimi and A’sharqiyyah universities recently obtained Ministry of Higher Education approval and started offering Bachelor Programmes. Both universities are operating on temporarily campuses but have already gained government fund and support to
construct permanent campuses in Buraimi city near the border with UAE and Ibra in A’ Sharqiyah region.

Sur University College also received approval from the Ministry of Higher Education and the construction for a new campus in Sur has already started.

The previous building occupied by the International Maritime College was returned to Oman Tourism College and this increased the capacity from 22 classes to 42 classes which can double the student intake. Further fund was also requested from government in order to have a training hotel and more entertainment facilities and services for the students.

The college is providing free accommodation for almost 470 students coming from different regions of Oman, plans of constructing its own accommodation is under the discussion.

Oman Tourism College is about to finalise a new affiliation and academic cooperation with international institution/s in order to introduce three bachelor programmes (tourism management, hospitality management and event management) to be commenced from September 2011. The College also plans to introduce further short courses.

**Tuition Fees**
Sultan Qaboos University does not charge tuition fees from students and the university also provides subsistence allowances. Private institutions charge tuition fees. Sample fees in selected institutions are as follows:

<table>
<thead>
<tr>
<th>Institution</th>
<th>Fees</th>
</tr>
</thead>
<tbody>
<tr>
<td>GUTech</td>
<td>RO 2,250 per year</td>
</tr>
<tr>
<td>Gulf College</td>
<td>RO 1,125 per semester</td>
</tr>
<tr>
<td>Majan College</td>
<td>RO 1,000 per semester</td>
</tr>
<tr>
<td>Sur University College</td>
<td>RO 1,600 per year</td>
</tr>
<tr>
<td>OTC</td>
<td>RO 0,600 per year including fees, accommodation, transport and food</td>
</tr>
<tr>
<td>Buraimi University</td>
<td>RO 1,600 per year</td>
</tr>
</tbody>
</table>

As the data shows, tuition fees vary considerably and potential students can make a choice between perceived quality and fee.

**Management Training Programme**
Sultan Qaboos University Last year three graduates were offered Management Trainee positions with major international hotel companies but none took it up. One student declined the offer for legitimate personal reasons; one did not accept it because of the perceived low salary.
**Regional Coverage**
The Colleges of Applied Sciences currently runs tourism its tourism programme in Salalah and Ibri. Gulf College and GUtech are currently building campuses with student accommodation that will accommodate students from the regions. Sultan Qaboos University and Majan College provide student accommodation for students whose families do not reside in the Muscat area.

More than 470 students are provided free accommodation, food and transport by Oman Tourism College, Muscat students provided with free transport and lunch at the college campus. In order to encourage students from the remote areas and spread tourism education and culture, OTC is also started two dedicated pre-foundation classes (30-44 students) since the year 2005. OTC sends a team every year to Salalah in order to conduct the admission registration and do the placement tests in the region.

In 2009, the Colleges of Applied Sciences will graduate 31 male students in Salalah (no females on the programme). In Ibri 5 males and 23 females will graduate.

**Student Placement/Work Experience**
At Sultan Qaboos University there is no dedicated training kitchen but students are trained in the general University kitchen and in food service areas.

Oman Tourism College has a state of the art training kitchen and food service area. The college has 6 training kitchens, 2 bulk kitchens, 4 training restaurants, 1 function hall, 3 multi purpose ball rooms, 4 changing rooms, dedicated simulation rooms and labs for HK, Front office and training like Opera, Fidelio, IATA programmes. The college is also running a professional catering unit which can enrich the student's practices and training. The National Hospitality Institute also has excellent facilities, including a training restaurant and kitchen. The institute also has very good simulation rooms for housekeeping and Front office programmes, number of labs where IATA, Fidelio and other reservations software’s are taught. None of the other higher education institution has any in-house practical facilities. Sur University College is in partnership with Sur Beach Hotel and a travel agency but does not have any practical approach or supervision on the student industry training.

**Government Involvement in Funding Tourism Education and Training**
With the growth in tourism development, Ministry of Higher Education (MHE), Ministry of Education, Ministry of Tourism and Ministry of Manpower made considerable efforts toward supporting tourism education and training.

The Ministry of Higher Education provides scholarships. In the 2008-2010 period the following number of scholarships were provided by the Ministry to the following institutions:

<table>
<thead>
<tr>
<th>Institution</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oman Tourism College</td>
<td>50</td>
<td>50</td>
<td>119</td>
<td>219</td>
</tr>
<tr>
<td>Gulf College</td>
<td>23</td>
<td>32</td>
<td>21</td>
<td>74</td>
</tr>
<tr>
<td>Sur university College</td>
<td>18</td>
<td>13</td>
<td>30</td>
<td>61</td>
</tr>
<tr>
<td>GU Tech</td>
<td>5</td>
<td>-</td>
<td>7</td>
<td>12</td>
</tr>
<tr>
<td>University Of Al Buraimi</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>20</td>
</tr>
<tr>
<td><strong>Grand Total</strong></td>
<td>95</td>
<td>95</td>
<td>177</td>
<td>386</td>
</tr>
</tbody>
</table>

Source: Central Admission (2010)
The statistics show that the number of scholarships doubled from 2008 to 2010. Oman Tourism College received more than 63% of the total scholarships in tourism and hospitality.

The Ministry of Education also made efforts to contribute towards spreading tourism culture, knowledge and to strengthen the students’ positive attitudes towards tourism as a future career. In the primary and high school curriculum four main themes relating to tourism were introduced and enhanced: Tourism; environment; culture and heritage; and work/work ethics. Several examples of tourist attractions, urban tourism, regional tourism, work in tourism, holiday, hotel and travel industry were introduced which were not present in the previous curriculum. The environmental issues were strongly introduced and in many subjects students are taught about natural reserves, birds, natural islands and sands, Oryx and wild animals and birds sanctuaries. The approach of culture is different than it was before and is more relevant to the needs of tourism and the increasingly multi-cultural life of Oman. Work and attitudes toward technical and vocational works are also discussed in many subjects.

Furthermore, by licensing the first secondary level tourism and hospitality school in Oman, the Ministry of Tourism and Ministry of Education initiated a new approach to tourism training by establishing the Muriaya Tourism School. The project will be launched in 2011 with a planned intake of 50 students. The programme will be run based on the German dual education system and students will receive two years of theoretical and practical training through an apprenticeship arrangement and will spend a further two years working at the hotel that sponsors their studies.

Part of the training provision is funded by the Ministry of Manpower. According information received verbally to Ministry of Manpower, this type of funding represents some 30-60 per cent of their institutional budget. According to figures provided by the Ministry of Manpower, the following numbers of students were funded in the field of tourism through the Ministry of Manpower fund:

<table>
<thead>
<tr>
<th>Year</th>
<th>Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>2007</td>
<td>433</td>
</tr>
<tr>
<td>2008</td>
<td>344</td>
</tr>
<tr>
<td>2009</td>
<td>484</td>
</tr>
<tr>
<td>2010 (until 9 August)</td>
<td>697</td>
</tr>
</tbody>
</table>

According to information received from the Ministry of Manpower, tourism receives a relatively large share from the fund; in 2007 and 2008 it received some 17 per cent of all funded places and this figure currently stands at some 40 per cent in August 2010. It must be noted that the figure for 2010 is indicative only and may change in either direction.

According to the Ministry of Manpower, the funding mechanism is currently lead by requests from employers and by the requirements of the Omanisation policy rather than by requests from training institutions. In other words, the Ministry of Manpower matches employers’ requests for training with job seekers wishing to undertake tourism related training rather than giving blank funding to training institutions. Following the matching process, the Ministry then oversees the contract signing between themselves, the candidate, the employers and the training institution. Candidates going through this training mechanism are legally obliged to work for the contracted employer for twice the length of the training funded through this mechanism. The Ministry of Manpower enforces this through legal measures. The length of training is typically 6-9 months and
this corresponds to 800-1,200 hours. The Ministry of Manpower has a role in curriculum development and sets the maximum hours and training institutes were indicating that they often feel this is done without consultation.

**Estimation of Total Number of Students in Higher Education/Vocational Tourism Programmes in 2010**

According to data obtained through the survey, in 2010 the following number of students are graduating with tourism related qualifications in the Sultanate:

- **Degree Level:** 267
- **Certificate Level and Short Courses:** 350

According to the data, in 2010 a total of 617 students received tourism related qualifications in Oman. This, according to project estimates, represents 2 per cent of the current tourism workforce.

**Training Needs for the 2011-2020 Period**

The key aim for the coming medium-term period is to gradually increase the number of students in both categories to cater for the planned industry expansion. However, increasing student numbers on these programmes alone will not solve the skills shortage if graduates do not find employment opportunities in the tourism sector or if they do not wish to seek employment in tourism. The short term priority must therefore be to improve student recruitment by removing administrative funding obstacles and by strengthening student employability. The latter of these can be achieved through a better matching of student career objectives with programme aims (career orientation, information regarding careers in the tourism sector, setting realistic expectations), strengthened education-industry links, structured management training programmes and internship arrangements and improved student work destination monitoring.

A further point that must be made is that the tourism industry does not only recruit graduates from tourism programmes. Given the diversity of skills needed in the sector, graduates general business qualifications such as finance, marketing, human resources etc can find employment opportunities in the industry – but the industry is competing for talent with other economic sectors.

Given the reported limited training provided by employers, strengthening continuous professional development of existing tourism employees through providing short courses and certified training programmes for existing employees should be encouraged. According to estimates, there is currently a further capacity to train some 350-450 further people at certificate and short courses level and this capacity should be used for the upskilling of existing employees. Once this capacity is fully utilized, there will be need for further expansion.
IMPLICATIONS FOR THE ACTION PLAN

- Tourism education and training is in an early development stage in Oman and institutions had limited time to develop their programmes.

- Tourism programmes are typically run within business and management department and are foreign affiliated (apart from Sultan Qaboos University) and Oman scores low on World Economic Forum Global Competitiveness Report 2009-2010.

- There is a wide and growing range of programmes offered at certificate, diploma and Bachelor degree level and there is a growing portfolio of vocational short courses offered.

- There is currently now Masters level programme in tourism offered in the Sultanate.

- Until now there was no secondary school level vocational training in tourism but a recent initiative will see the creation of the Muriya Tourism School.

- There is a need for institutions to partner with strong foreign universities and colleges in order to strengthen their programme and to raise/maintain the prestige of their programmes to prospective students.

- Few institutions (mainly training institutions) have mechanisms to monitor student work destinations and student employability.

- There is a need for a comprehensive subject review of tourism education.

- Most tourism education and training institutions run below capacity as student recruitment is sluggish.

- Training institutions feel that there are bottlenecks in their funding mechanism.

- Management training programmes in tourism have not taken off.

- Tourism education and training institutions run at 50-60 per cent of their capacity in terms of student numbers and this capacity should be fully utilized.

- There is a need to better utilise training institutions for the provision of certified courses for continuous professional development of existing tourism employees.
4.7 SURVEY OF INTEGRATED TOURISM COMPLEXES (ITCs)

Introduction
As part of the survey, interviews were conducted with the CEO or equivalent and/or HR Managers of Integrated Tourism Complexes. In total, interviews were conducted with the following four companies:

- The Wave Project
- Orascom Muriya
- Muscat Hills
- Yiti Project

Blue City was also approached by the project team but company representatives were not available for the interview. A likely reason for this is the financial uncertainty of the project at time of the survey.

As explained in Section 2.5, the criteria for selecting companies for the interviews was based on the need to collect information from ITCs that have already started their operation in the Sultanate and have, therefore, gained experience with staff recruitment and have knowledge and experience regarding tourism labour market issues in the country. The selection of ITCs was conducted in close collaboration with the Ministry of Tourism.

The main objective of the survey was to collect information regarding the ITCs employment creation plans, current and future human resource recruitment plans and their involvement in training provision. The survey was hindered by the lack of disclosure of planned employment numbers and by the uncertainty at the time regarding the exact phasing of the projects.

ITC approach to tourism development in Oman
The survey determined that Integrated Tourism Complexes (ITCs) in Oman are planned to typically consist of 1-3 five star hotels, a marina, a golf club, a marina, restaurants and retail outlets and residential units.

Hotels
According to research conducted for this project, an ITC would typically have 2-4 hotels as part of the development. A typical hotel within an ITC is a 200-300 room 5 star international branded hotel, apart from the Muriya Shati Salalah Resort where the hotels will be larger, 300-400 rooms. All surveyed ITCs were planning hotel development at the top end of the market with an emphasis on 5-star branded hotels run under management contract arrangements.
Golf Course
A typical golf course will be an 18-hole golf course employing some 40-55 employees. Muscat Hills currently employs some 30 maintenance people who are all Omani and about 10 operations people.

Marina
A typical marina will have 200 berths for medium sized boats.

Restaurants and retail outlets
These will be outsourced and there are no specific plans and information available at this stage neither regarding proposed operators nor about the proposed number of retail units.

ITCs and Omanisation targets
During the interviews, ITCs reported that they are currently required to meet a 35 per cent Omanisation target. According to information received from the Ministry of Tourism, ITCs are required to meet 40 per cent, 50 per cent or 60 per cent Omanisation target and, thus, there is a discrepancy between the two sets of figures.

Current and Future Recruitment
The interviewed ITCs reported overall success with recruitment to the headquarters and high levels of Omanisation. No specific skill shortages were reported at the headquarters.

When asked about recruitment plans for the actual operation of the ITCs such as the hotels, golf courses and other elements of the projects, the ITC managers were unclear how this will be managed. According to current plans, the hotels will be operated under management contract arrangements and that means that the actual operator will be responsible for the staffing of the hotels. The retail outlets will be contracted out and neither the list of operators nor the number and size of retail units were made available to the project team. Consequently, and give the fact that the actual staff recruitment will be the responsibility of the operating companies, the approach and plans were unclear at the time of the survey.

Best Practice Example for Training Golf Club Operators
The experience of Muscat Hills shows that training OMANis abroad for the new skills needed for the golf course maintenance was a successful approach and is recommended to be used by other operators in order to give exposure and practical experience to future employees of such operations.

ITC development Case Study - Muriya Tourism Development
According to the interview, Muriya currently has plans for the development of four key projects:

1. Jebel Sifah
2. Salalah Beach
3. Al Sodah Island
4. City Walk Muscat
According to information received during the interview, the Jebel Sifah development will include the following four 5-star hotels and one Marina Boutique hotel

1. Banyan Tree
2. Four Seasons
3. Missoni
4. Cheval Blanc
5. Marina Boutique Hotel

According to information received from the Company, the four hotels will have 200-250 rooms each and the Marina Boutique hotel will operate with 55 rooms. Construction of the Marina Boutique Hotel has started and soft opening is planned for the end of 2011. From the hotels, the first one to be built is the 250 room Missioni hotel, planned for opening in 2012-2013. The Company is currently waiting for the permit to start construction. The Complex is planned to include a golf course, a 200 berth marina for mid-sized boats, 500 houses and 200 apartments, restaurants and shops. The marina is expected to be opened in 2011 and of the residential units some 50 will be complete by the end of 2010. Plans for the Shati Salalah Resort include 5 hotels at 5-star category and branded as Movenpick, Cheval Blanc, Rotana. The hotels are planned to have 300-400 rooms. Of these the Rotana hotel is currently under construction and is expected to be opened at the end of 2012. The resort is planned to include 500 houses and 200 apartments, two 18-hole golf courses, a 200 berth marina, marina town, restaurants and cafes. The company is planning further two projects, Al Sodah Island and City Walk Muscat.

**ITC and vocational training development**

The survey revealed that Muriya Tourism Development has recently signed a MoU with the Ministry of Tourism, Ministry of Education and Ministry of Manpower for the establishment of a secondary school level vocational Hotel School. As currently there is no secondary school level vocational training in tourism and hospitality in Oman this is very important new development in the Sultanate. If successful, the school will graduate young people with practical skills that are needed by the hotels and if the training is carefully managed they are likely to be in high demand by hotels and other tourism companies. This approach will allow young Omanis with lower level of school attainment to obtain a qualification that will be in high demand by the growing tourism industry. This could have an important favourable effect on increasing the labour market participation of young Omanis.

Information received during the interview revealed that the School will initially train some 50 students in its first year of operation and the plan is to provide training not only for Muriya employees but also for the wider tourism sector.

Given the novelty of the approach, the Action Plan will recommend to run pilot projects and replicate the model if it is successful. It would also be advisable to consider opening similar schools at other regions to supply trained employees for the new projects. In order to effectively monitor the success of the project, it is important to carefully monitor student recruitment and retention and to monitor work destinations and employability of the school leavers.
Employment Creation Effect of ITCs

According to the research conducted into ITCs for this project, there did not appear to be a standard structure or criteria for ITCs in Oman. This is perhaps due to the fact that the exact concept and composition of ITCs that have already been built or are planned for development are still in evolution. Based on currently available information, a typical ITC will create tourism sector employment opportunities in the following areas:

Tourism Industry Jobs

- Hotels
- Golf Course
- Marina
- Food and Beverage Outlets
- Retail Outlets
- Other tourist attractions, if planned (such as amusement park)
- Administrative and sales jobs for company headquarters

Additional jobs will be created in the areas of:

- Housekeeping (private maids) for the residential homes
- Maintenance workers (residential homes)

Most of the jobs that will be created by the ITCs already exist in the country. The new skills that these will bring are in the areas of golf course management and maintenance, marina management and maintenance and potentially jobs in the amusement park.

The most significant employment creation effect can be expected from the hotels, food and beverage and retail outlets. As the exact number of food and beverage and retail outlets within ITCs is currently not firmly planned, it is not possible to give an estimate regarding the number of jobs created by those businesses. However, at this stage, the job creation effect of hotels, golf courses and marinas can be estimated based on research conducted and on industry practice.

Below are two examples for a hotel operation in Oman. The data was obtained from the tourism firm survey and it illustrates the employment creation effect of a typical (in a 250 room category) 5-star hotel in Oman:

Hotel A:

<table>
<thead>
<tr>
<th>Star rating:</th>
<th>5-Star</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of Rooms:</td>
<td>258</td>
</tr>
<tr>
<td>Total number of Employees:</td>
<td>485</td>
</tr>
<tr>
<td>Room to Employee Ratio:</td>
<td>1:1.88</td>
</tr>
<tr>
<td>Number of Employees by Functional Departments:</td>
<td></td>
</tr>
<tr>
<td>Food and Beverage Service:</td>
<td>127</td>
</tr>
<tr>
<td>Culinary/Kitchen:</td>
<td>80</td>
</tr>
<tr>
<td>Housekeeping:</td>
<td>54</td>
</tr>
<tr>
<td>Front Office:</td>
<td>50</td>
</tr>
<tr>
<td>HR and Personnel Department:</td>
<td>12</td>
</tr>
<tr>
<td>PR &amp; Drivers:</td>
<td>5</td>
</tr>
<tr>
<td>Service and Maintenance:</td>
<td>37</td>
</tr>
<tr>
<td>Landscaping/Gardening:</td>
<td>0</td>
</tr>
<tr>
<td>Stores:</td>
<td>5</td>
</tr>
</tbody>
</table>
Management: 14
Health Centre: 28
Finance: 13
Sales and Marketing: 8
Media & Advertising: 0
Public Relations: 30
Other: 22

**Hotel B:**

This is a larger hotel with over 600 rooms. As shown, the room to employee ratio is similar to the smaller 5-star hotel.

<table>
<thead>
<tr>
<th>Star rating:</th>
<th>5-Star</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of Rooms:</td>
<td>638</td>
</tr>
<tr>
<td>Total number of Employees:</td>
<td>1113</td>
</tr>
<tr>
<td>Room to Employee Ratio:</td>
<td>1:1.75</td>
</tr>
</tbody>
</table>

Number of Employees by Functional Departments:
- Food and Beverage Service: 233
- Culinary/Kitchen: 173
- Housekeeping: 161
- Front Office: 129
- HR and Personnel Department: 23
- PR & Drivers: 18
- Service and Maintenance: 63
- Landscaping/Gardening: 0
- Stores: 6
- Health Centre: 46
- Finance: 45
- Sales and Marketing: 26
- Media & Advertising: 0
- Public Relations: 4
- Other: 186

**Employment Creation Effect of ITCs**

In view of the evidence that was received from the interviews with ITCs and the additional data from the tourism firm questionnaire survey, the following evaluation can be made about the employment creation effect of the different elements of ITCs:

- 250 bedroom 5-star hotel: 500-600 employees
- 18 hole golf course: 55 employees
- 250 berth Marina: 10 employees
- Restaurant: 55 (Based on current industry averages)
- Head Office: 85 (Based on current industry averages)
- Retail Outlets: Depending on type of stores and number of units
- Maintenance workers: 100
- Other attractions: Depending on nature and type of attraction
- Domestic helpers: Employed by individual families

**TOTAL ESTIMATION** (Without other attraction such as amusement park and without domestic helpers): **2000-2500 Employees per ITC**
Planned Tourism Projects and Their Employment Creation Effect

Due to the uncertainty regarding recruitment plans and the fact that recruitment will essentially be the responsibility of the operating company that will be contracted for the running of the hotels (or other tourism enterprises), it was decided to base employment creation projection on information received from the Ministry of Tourism regarding projects planned within the 8th 5 Year Plan (2011-2015) (Ministry of Tourism, 2010). This will allow a more robust estimation of the employment creation effect of the planned projects.

Information contained in Table 4.22 was compiled from regional tables received from the Ministry of Tourism and the data was rearranged to show the planned annual employment growth by regions. The figures are based purely on the existing planned projects and are subject to change.

The data shows that the phasing of the projects is unevenly distributed in the period and the peak years in terms of new projects opening are expected to be in 2015, 2014 and 2012. In terms of the regional distribution of the projects, the majority are planned for the Muscat, Dhofar, Musandam and Sharquiyah regions.
<table>
<thead>
<tr>
<th>Expected Year of Operation</th>
<th>Omanisation Code</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>40 per cent</td>
</tr>
<tr>
<td></td>
<td>50 per cent</td>
</tr>
<tr>
<td></td>
<td>60 per cent</td>
</tr>
<tr>
<td>2011</td>
<td>Muscat</td>
</tr>
<tr>
<td></td>
<td>Muscat Hills</td>
</tr>
<tr>
<td></td>
<td>400</td>
</tr>
<tr>
<td></td>
<td>The Wave</td>
</tr>
<tr>
<td></td>
<td>1200</td>
</tr>
<tr>
<td></td>
<td>Dev Intercontinental Area</td>
</tr>
<tr>
<td></td>
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<td></td>
<td>Fort Hotel</td>
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<td>Project</td>
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<td>300</td>
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<td></td>
<td>Convention Centre</td>
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<td>Project</td>
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<td></td>
<td>1200</td>
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<td>Yiti Project</td>
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<td>Saraya Bandar</td>
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<td>Jissah</td>
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<td>Entertainment</td>
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<td>Complex at</td>
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<td>Yiti Highest</td>
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<tr>
<td>2012</td>
<td>Muscat</td>
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<td>Khairan Project</td>
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<td>200</td>
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<tr>
<td></td>
<td>Restaurant</td>
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<td></td>
<td>Complex Saruj</td>
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<td>Omenagen</td>
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<td></td>
<td>Project</td>
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<tr>
<td></td>
<td>800</td>
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<tr>
<td></td>
<td>Seafood</td>
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<tr>
<td></td>
<td>Restaurant</td>
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<td>40</td>
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<tr>
<td>2013</td>
<td>Muscat</td>
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<td></td>
<td>Jabal Al Sifa</td>
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<td>Project</td>
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<td>1000</td>
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<td>2014</td>
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<tr>
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<td>200</td>
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<td>400</td>
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<tr>
<td>2015</td>
<td>Musandam</td>
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<td></td>
<td>Tourism Projects</td>
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<td></td>
<td>Khasab</td>
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<td></td>
<td>150</td>
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<tr>
<td></td>
<td>Alia Harf Resort</td>
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<tr>
<td></td>
<td>Khasab</td>
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<tr>
<td></td>
<td>400</td>
</tr>
<tr>
<td></td>
<td>Marina Hotel</td>
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<tr>
<td></td>
<td>200</td>
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<tr>
<td></td>
<td>Bukha Hotel</td>
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<tr>
<td></td>
<td>80</td>
</tr>
<tr>
<td></td>
<td>Dibba Resort</td>
</tr>
<tr>
<td></td>
<td>80</td>
</tr>
<tr>
<td>2016</td>
<td>Musandam</td>
</tr>
<tr>
<td></td>
<td>Extension</td>
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<tr>
<td></td>
<td>Khasab</td>
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<tr>
<td></td>
<td>100</td>
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<tr>
<td></td>
<td>Golden Tulip</td>
</tr>
<tr>
<td></td>
<td>100</td>
</tr>
<tr>
<td>2017</td>
<td>Musandam</td>
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<td></td>
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<tr>
<td>2018</td>
<td>Musandam</td>
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<td></td>
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<tr>
<td>2019</td>
<td>Musandam</td>
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<td></td>
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<tr>
<td>2020</td>
<td>Musandam</td>
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<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>Location</td>
<td>Project Description</td>
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<td>--------------------------------------</td>
</tr>
<tr>
<td>Dhofar</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Commercial Centre Salalah</td>
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<tr>
<td></td>
<td>Shati Salalah Resort Phas I</td>
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<tr>
<td></td>
<td>Mirbat Resort Phase 2</td>
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<tr>
<td></td>
<td>Al-Damar Beach Project</td>
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<tr>
<td></td>
<td>Medical City Project</td>
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<td></td>
<td>Iftliqoot Resort</td>
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<tr>
<td></td>
<td>Al-Swaymia Project</td>
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<tr>
<td></td>
<td>Safeer Tourism Complex</td>
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<tr>
<td></td>
<td>Akyan Resort</td>
</tr>
<tr>
<td>Al-Dhakliyah</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Jabal Akhdar Resort</td>
</tr>
<tr>
<td></td>
<td>Tourism Village Jabal Shams</td>
</tr>
<tr>
<td></td>
<td>Tourist Restaurant Nizwa</td>
</tr>
<tr>
<td>Al-Sharqiyah</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Al-Deyar Resort Sur</td>
</tr>
<tr>
<td></td>
<td>Khayal Mukala Project</td>
</tr>
<tr>
<td></td>
<td>Rwais Resort</td>
</tr>
<tr>
<td></td>
<td>Khaba Project</td>
</tr>
</tbody>
</table>
Table 4.22 Employment Creation of Planned Tourism Projects by 2015 *

Source: Ministry of Tourism Projects planned within the 8th 5 Year Plan (2011-2015)

The information presented in this table is based on information provided by the Ministry of Tourism on the planned projects within the 8th 5 year plan period. The data is reproduced here in a different format and the employment calculation effect was conducted for the purposes of this project.
4.8 TOURISM EMPLOYMENT GROWTH PROJECTIONS

Current Employment Levels in Tourism

The survey collected data on the current levels and dimensions of employment in tourism. Based on the sample data that was collected, estimates were then made regarding the true dimension of direct employment in the industry in the Sultanate.

The sample estimates were estimated at the upper limits to provide an indication of overall figures of employment on the basis of actual responses received. As official total manpower data for the tourism industry were not available, the estimations had to be done on the basis of the proportion of establishments covered within a particular sector, taking into account sample response rates, average firm sizes per sector and official tourism labour market data as appropriate. The table below provides a summary of the estimations for the principal tourism sub-sectors in Oman:

<table>
<thead>
<tr>
<th>Sub-Sector</th>
<th>From Survey</th>
<th>Estimation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotel</td>
<td>7506</td>
<td>9,570</td>
</tr>
<tr>
<td>1 Star</td>
<td>629</td>
<td>953</td>
</tr>
<tr>
<td>2 Stars</td>
<td>512</td>
<td>721</td>
</tr>
<tr>
<td>3 Stars</td>
<td>923</td>
<td>1,319</td>
</tr>
<tr>
<td>4 Stars</td>
<td>1362</td>
<td>1,584</td>
</tr>
<tr>
<td>5 Stars</td>
<td>3807</td>
<td>4,479</td>
</tr>
<tr>
<td>Not Classified</td>
<td>273</td>
<td>515</td>
</tr>
<tr>
<td>Tour Operator/Travel Agency</td>
<td>1390</td>
<td>3,773</td>
</tr>
<tr>
<td>Restaurant*</td>
<td>970</td>
<td>2,540</td>
</tr>
<tr>
<td>Dive Centre</td>
<td>76</td>
<td>139</td>
</tr>
<tr>
<td>Car Hire Company**</td>
<td>125</td>
<td>608</td>
</tr>
<tr>
<td>Airline</td>
<td>4592</td>
<td>5,500</td>
</tr>
<tr>
<td>Museum/Tourist Attraction</td>
<td>37</td>
<td>315</td>
</tr>
<tr>
<td>Water Sports Centre/Marina</td>
<td>113</td>
<td>170</td>
</tr>
<tr>
<td>Golf Club</td>
<td>53</td>
<td>53</td>
</tr>
<tr>
<td>Other Type</td>
<td>1644</td>
<td>7,562</td>
</tr>
<tr>
<td>Other</td>
<td>1,000</td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>16506</strong></td>
<td><strong>31,230</strong></td>
</tr>
</tbody>
</table>

Table 4.23 Estimated Total Current Employment in Tourism in The Sultanate of Oman

As shown in Table 4.23, it is estimated that the tourism industry currently employs in the region of 31,230 employees. This figure includes both Omani and non-Omani employees.
Based on current and planned business growth in the tourism sector, the tourism sector employment is estimated to grow as follows in the period of 2011-2020.

<table>
<thead>
<tr>
<th>Year</th>
<th>Number of Employees</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>31230</td>
</tr>
<tr>
<td>2011</td>
<td>34353</td>
</tr>
<tr>
<td>2012</td>
<td>39506</td>
</tr>
<tr>
<td>2013</td>
<td>45432</td>
</tr>
<tr>
<td>2014</td>
<td>52247</td>
</tr>
<tr>
<td>2015</td>
<td>54859</td>
</tr>
<tr>
<td>2016</td>
<td>56505</td>
</tr>
<tr>
<td>2017</td>
<td>58200</td>
</tr>
<tr>
<td>2018</td>
<td>59946</td>
</tr>
<tr>
<td>2019</td>
<td>61744</td>
</tr>
<tr>
<td>2020</td>
<td>63597</td>
</tr>
</tbody>
</table>

**Table 4.24 Estimated Employment Growth in the 2011-2020 Period**

As shown in *Table 4.24*, the number of tourism jobs in the Sultanate is estimated to double by 2020, creating 32,367 jobs by 2020. Similarly, according to project estimates, by 2015 the sector will create an additional 23,629 jobs for the Omani people.

Based on current labour market trends, it is possible to estimate the number of jobs that will be created in the different skill categories. *Table 2.25* shows the estimated job creation in managerial, supervisory and operative jobs.

<table>
<thead>
<tr>
<th>Year</th>
<th>Number of Employees</th>
<th>Of which Managerial</th>
<th>Supervisory</th>
<th>Operative</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>31230</td>
<td>2811</td>
<td>4685</td>
<td>23735</td>
</tr>
<tr>
<td>2011</td>
<td>34353</td>
<td>3092</td>
<td>5153</td>
<td>26108</td>
</tr>
<tr>
<td>2012</td>
<td>39506</td>
<td>3556</td>
<td>5926</td>
<td>30025</td>
</tr>
<tr>
<td>2013</td>
<td>45432</td>
<td>4089</td>
<td>6815</td>
<td>34528</td>
</tr>
<tr>
<td>2014</td>
<td>52247</td>
<td>4702</td>
<td>7837</td>
<td>39707</td>
</tr>
<tr>
<td>2015</td>
<td>54859</td>
<td>4937</td>
<td>8229</td>
<td>41693</td>
</tr>
<tr>
<td>2016</td>
<td>56505</td>
<td>5085</td>
<td>8476</td>
<td>42944</td>
</tr>
<tr>
<td>2017</td>
<td>58200</td>
<td>5238</td>
<td>8730</td>
<td>44232</td>
</tr>
<tr>
<td>2018</td>
<td>59946</td>
<td>5395</td>
<td>8992</td>
<td>45559</td>
</tr>
<tr>
<td>2019</td>
<td>61744</td>
<td>5557</td>
<td>9262</td>
<td>46926</td>
</tr>
<tr>
<td>2020</td>
<td>63597</td>
<td>5724</td>
<td>9539</td>
<td>48333</td>
</tr>
</tbody>
</table>

**Table 2.25 Estimated Employment Growth in Managerial, Supervisory and Operative Jobs**
As seen in *Table 2.25*, it is estimated that by 2020 the tourism sector will create an additional 2,913 managerial level, 4,854 supervisory level and 24,598 operative level jobs. This represents a substantial employment creation effect and it is evident that this demonstrates the growing future importance of the tourism sector within the Omani economy.

The doubling of the tourism labour force within ten years represents a significant increase in demand for tourism human resources. The current output of tourism education and hospitality institutions will be insufficient to meet this demand given the small numbers of graduates that these institutions currently produce. It should be noted that the bottleneck in relation to tourism labour supply is not necessarily caused by the capacity of these institutions but rather the capacity utilization caused by sluggish student recruitment and bottlenecks with the funding mechanism of training.

The currently identified skill gaps are in the area of and these are going to be skills where future training has to focus:
- Managerial skills
- Hospitality skills
- IT
- Languages (particularly English)
- Customer service skills
- Sales and marketing
- Finance
- Ticketing and reservations
- Tour guiding

In addition to these, it is anticipated that new skills for the projects are needed in the area of:
- Sport and recreation
- Golf course management and maintenance
- Heritage interpretation
- Handicrafts
- Event management and conference organizing

The Action Plan is providing recommendations for closing these skills gaps in the future.
SECTION 5

TOURISM HUMAN RESOURCES ACTION PLAN FOR THE SULTANATE OF OMAN

2011-2020
5. **Introduction**

The Tourism Human Resources Development Action Plan (2011-2020) was developed on the basis of the outcomes and key findings of the comprehensive and integrated analysis of the stakeholder surveys and secondary data that was carried out in the framework of the Tourism Manpower and Training Needs Analysis.

5.1 **Strategic Issues and Challenges for the Tourism Human Resources Development Action Plan (2011-2020)**

The Tourism Manpower and Training Needs Analysis identified the following key strategic issues and challenges to be addressed through future tourism human resources development interventions in the Sultanate of Oman:

1. **General State of the Tourism Sector in Oman: Growth and Stability**

   Tourism is an important growth sector of the national economy contributing in the region of 2.86 per cent to the Sultanate’s GDP. Revenue from the sector and demand is growing and this trend is likely to continue into the future. Sustainable tourism development is a national priority and the philosophy of sustainable tourism development is at cornerstone of the National Tourism Development Plan 2006-2010. According to this plan, the tourism sector is undergoing a major phased structural expansion of its supply of products and services which will have a significant effect on the demand for skilled tourism labour. This will place additional responsibilities on government, the private sector, education sector and the wider population in managing this transitional period in order to ensure that the socio-economic benefits from this growth are realized for the Sultanate.

   The surveys show an overall favourable situation in the tourism labour market in the country and an overall state of stability and satisfaction in the industry

   The task for the Tourism Human Resources Development Action Plan (2011-2020) is to ensure the maintenance of this stability and support the planned phased growth of the sector from a labour and human resources perspective, while also ensuring the successful implementation of the Omanisation Policy in tourism

2. **Coordination Tourism Human Resources Development Activities**

The study has shown beyond any reproach that tourism human resource development activities are carried out by a very wide range of stakeholders, including Government Agencies, the education sector and the private sector. Each of these Agencies and sectors make substantial contributions to the overall development of tourism human resources development in the Sultanate and this is reflected in overall favourable state of tourism human resources in the Sultanate.

   The analysis of the findings show, however, that there is a need for strengthened stakeholder cooperation and establishing a robust coordination mechanism to strengthen monitoring, planning and partnership in the field of tourism human resources development across the entire tourism industry.
3. Future Tourism Sector Growth and Employment Creation

According to the project’s estimates, by 2015 the sector will create 23,629 new jobs, of which 4,937 will be managerial jobs, 8,229 supervisory and 41,693 operative jobs.

Similarly, according to project estimates, by 2020 the tourism industry is expected to create new 32,367 jobs, of which 2,915 will be at managerial level, 4,854 at supervisory level and 24,598 operative jobs. This represents a substantial employment creation effect and demonstrates the growing future importance of the tourism sector within the Omani economy. It is evident that in order for the Sultanate to meet this heightened future demand, the employment creation effect must be managed through a phased approach and involve a number of policy interventions and initiatives to adequately meet this growth.

4. Image of Tourism Sector Employment

The surveys show that there is complete consensus on the fact that the Omani population has limited knowledge and awareness about the tourism sector and about the jobs that it offers. This is not surprising, given the relative newness of the sector as an economic activity in the Sultanate. Focus group meetings revealed that although the Omani population is largely favourable about the development of tourism, they have limited knowledge about the sector and particularly about the jobs it offers. These views were echoed by the HR Directors and by tourism educators as well.

The surveys also show that apart from the lack of knowledge, tourism carries an often unfavourable and sometimes misguided image. The hotel sector carries a particularly negative image because of its association with alcohol and the assumption of improper social behaviour. The sector’s association with alcohol is a major deterrent to the recruitment of Omans into working in the tourism sector and also the recruitment of students into tourism education and training institutions.

5. Salaries in Tourism

The data from both secondary information and from the primary surveys unanimously indicate that the general level of pay puts tourism at a competitive disadvantage with other economic sectors and this contributes to the poor image of the sector.

Secondary data showed that in 2008 the official average salaries in the hotel and restaurant sector are below the national average and that the average salary in the restaurant sector was below the average salary in the construction sector.

HR Directors confirmed the notion of general low pay in the sector and saw this as a contributor to the poor image the sector. When asked about their level of satisfaction with aspects of working in tourism, Omani employees expressed high level of dissatisfaction with their salary and benefits package. Similarly, when asked about the possible reasons for wanting to leave tourism sector employment, the first reason they stated for this was that they wanted a better salary. The focus group meetings also confirmed this view.

There is a need to improve the salaries in the sector through better training, better promotion prospects and through the raising of minimum salaries set for Omani employees set in the context of Omanisation Policy for the sector.
6. Student Employability
Although student employability and student work destinations after graduation are not systematically monitored by educational institutions but evidence from the focus group meetings and through communication by graduates to the Ministry of Tourism shows that there is a mismatch in the tourism labour market between graduates, their skills and aspirations and the job opportunities the sector provides.

The image of the tourism sector and low salaries were identified as deterrents and tourism graduates look for better paid and better valued employment opportunities in other economic sectors.

Although there is evidence from the surveys for recruitment of graduates into the industry, particularly from for skilled and supervisory level jobs, improving the employability of the graduates is an important task for the future.

Furthermore, there is a need to improve student employability and to provide improved match between graduates and the job market, both in terms of skills and expectations from students and employers.

Systems for the monitoring of Student employability needs to be strengthened by the education and training institutions.

7. Provision of Tourism Education and Training and Capacity Utilization
Evidence from the surveys education and training institutions show that tourism education and training institutions currently operate below capacity in terms of student numbers. The main reason for this is sluggish recruitment, caused by the lack of awareness of the population about tourism education and training, the poor or misguided image of tourism sector employment, the perceived low salaries in tourism and working conditions such as preference of the Omani population for morning shifts and statuary holidays.

Furthermore, there is a need for sustained investment in tourism training provision by Ministry of Manpower and there is a need for strengthened dialogue between the key stakeholders.

There is a need to increase the provision of continuous staff development activities through the provision of certified short courses and qualifications and these can be linked with the training institutions.

There is a need for a comprehensive review of tourism curriculum across all institutions to be conducted in conjunction with the Ministry of Higher Education and with the involvement of selected national and international experts.
8. Omanisation Policy Targets and Minimum Salary
The surveys show consistent support for the Omanisation policy by employers and by the Omani population. The data also shows that the tourism sector has made remarkable progress in achieving the current level of Omanisation in a period of dynamic growth.

The data shows that the current levels of Omanisation lag behind the Omanisation targets that were set in 2005 for the period of 2005-2010 and on the basis of the comprehensive analysis of data and survey findings, it is recommended that the Omanisation targets for the tourism sector be revised at a level that:
  o Maximizes the benefits from tourism employment creation to the Omani people;
  o While at the same time ensures the long term financial viability and international competitiveness of the sector; and
  o And supports the strategy of positioning Oman as an upmarket tourism destination and the development of new tourism regions and products in the Sultanate.

There is a need to develop a new classification system for tourism industry activities and sub-sectors in line with the UNWTO Tourism Satellite Account Classification

Currently there are no differential Omanisation targets for certain jobs in the tourism sector (apart from taxi drivers which occupation is now 100 per cent Omanised but this classification is outside the current definition of tourism sector employment)

Furthermore, it is recommended that the minimum salaries set for Omani employees should be increased in consultation with employers

9. Closing of Skill Gaps
The surveys identified that certain skill gap exist amongst the Omani employees. Similar skill gaps were not reported by employers for non-Omani employees who can be recruited through recruitment agencies from overseas. The surveys unanimously point towards a skill gaps amongst the Omani population in the following areas:
  o Managerial skills
  o Hospitality skills
  o IT
  o Languages (particularly English)
  o Customer service skills
  o Sales and marketing
  o Finance
  o Ticketing and reservations
  o Tour guiding
  o Sport and recreation
  o Golf course management and maintenance
  o Heritage interpretation
  o Handicrafts
  o Event management and conference organizing

The closing of these skill gaps can be achieved through strengthened education and training provision, particularly in the IT, languages, managerial skills and customer service skill areas, ticketing and reservations, finance, tour guiding, event management
Some skills such as golf course management and heritage interpretation will be required in small numbers and can be learnt abroad.

The closing of the skill gaps in the hospitality, particularly in the food and beverage (food service and food preparation areas) is more problematic and this hinges on the image problem and the issue of handling alcohol.

10. Tour Guide Licensing and Training
Tour guide training is currently provided at three levels, Bachelor’s Degree at Sultan Qaboos University, at Diploma level at Oman Tourism College and Certificate level at National Hospitality Institute.

Tour Guide Licensing is conducted by the Tour Guide Licensing Committee at the Ministry of Tourism.

In early 2010 there were some 140 tour guides officially licensed in the Sultanate but there is an increasing number of unlicensed non-Omani guides operating in the country. There is a need to reengineer tour guide training and licensing through a closer alignment of tour guide training and licensing in close cooperation with the training institutions.

11. Monitoring and Research in Tourism Human Resources
There is currently limited monitoring and research into the tourism labour market and data collection is fragmented between the Ministries of National Economy and Ministry of Manpower.

The Ministry of Tourism currently has no direct involvement in tourism labour market data collection or monitoring and does not act as a lead agency in this respect. It is recommended to harmonise the classification of tourism sector employment between the Ministry of Tourism, Ministry of National Economy and Ministry of Manpower and to base it on the UNWTO Tourism Satellite Account Classification (also used for this project). To this end, there is a need to develop a system of regular data collection mechanism and research regarding the tourism labour market and the Ministry of Tourism to be the lead Agency for this.

Based on these strategic issues and challenges, the Action Plan will be built around the following five Strategic Objectives:

**STRATEGIC OBJECTIVE 1**
Establish new coordination mechanisms to strengthen planning, monitoring and partnership for national level human resource development policy in the tourism sector.

**STRATEGIC OBJECTIVE 2**
Strengthen Omanisation Policy implementation.

**STRATEGIC OBJECTIVE 3**
Enhance public awareness of tourism and improve the image of tourism as an employer and industry.

**STRATEGIC OBJECTIVE 4**
Strengthen tourism education/job training and student employment.

**STRATEGIC OBJECTIVE 5**
Monitoring and evaluation of action plan implementation.
5.2 Strategic Objectives

Based on the issues and challenges described above in Section 5.1, the key overall Strategic Objectives of the Tourism Human Resources Development Action Plan (2011-2020) are fivefold:

**STRATEGIC OBJECTIVE 1**

**ESTABLISH NEW COORDINATION MECHANISM TO STRENGTHEN PLANNING, MONITORING AND PARTNERSHIP FOR NATIONAL LEVEL HUMAN RESOURCE DEVELOPMENT POLICY IN THE TOURISM SECTOR**

This strategic objective will be met by the formulation of the Oman National Tourism Human Resources Development Committee (ONTHRDC), the entity that will oversee, drive and monitor the implementation of the recommendations of the Action Plan. The Committee will function in conjunction with a strengthened Tourism Human Resources Department/Unit within MoT that will act as Secretariat for ONTHRDC.

Given the current fragmentation in tourism human resource development activities in the Sultanate, it is of paramount importance to establish a forum for leading, coordinating and influencing HRD policy for the tourism industry. Currently no individual organisation or government department has a clear leadership role in this area. This leads to a situation where actions taken by different stakeholders affecting human resources are fragmented and are often unknown to the other government departments and stakeholders. There is also a need for improved dialogue and communication between the public and the private sector in this area. The establishment of the Committee would play an important role in strengthening policy coordination, communication and, where appropriate, joint collaboration and resource pooling.

The leadership of ONTHRDC would lie with the Ministry of Tourism who would act as a lead agency for the creation, management and funding of the Committee.

ONTHRDC would function as a high level strategic body that leads policy developments in the area of tourism human resource development. Furthermore, ONTHRDS will facilitate communication and cooperation amongst government departments, between the public-private sectors and with tourism education and training institutions; it will coordinate research and data collection activities, commission reports and organise awareness raising workshops and training activities.

The creation of ONTHRDC will eliminate the current fragmentation in the system and improve communication and information availability. The Ministry of Tourism will become a lead agency in tourism human resource development in the Sultanate and will be able to influence, plan and monitor tourism human resource development activities for the benefit of the tourism industry, the Omani population and for all tourism industry employees.
Proposal for the Formulation of the Oman National Tourism Human Resources Development Committee (ONTHRDC)

Constitution

Ministry of Tourism  (Senior Representative)  Chair

Joint Committee for Omanisation in the Tourism and Travel Industry

Nominated Members

- Ministry of Manpower
- Ministry of Higher Education
- Ministry of Education
- Ministry of Transport and Communication
- Representatives of Tourism Private Sector Companies from Muscat and from the other regions and Governorates
  - Hotels
  - Restaurants
  - Travel Agency and Tour Operators
  - Tourism Transport
  - Tourist Attractions
  - Tour Guides
  - ITCs
  - Other tourism related companies
- Representatives of Tourism Higher Education and Training Institutions
- National and International Expert Advisor(s)
Terms of Reference
for Oman National Tourism Human Resources Development Committee
(ONTHRSC)

Reporting to H.E. Minister of Tourism, the Committee will

Overall purpose

1. Ensure the overall planning, coordination and monitoring of human resource development activities for the tourism industry and to oversee, drive and monitor the implementation of the Action Plan

Coordinate and Drive

2. Coordinate and drive the implementation of the recommendations of the Tourism Human Resources Development Action Plan (2011-2020)

3. Coordinate all human resources development activities related to the tourism industry

4. Coordinate and drive awareness raising initiatives, workshops, meetings, training seminars related to tourism human resource development

Review

5. Keep under review regulations and policies related to human resources in the tourism sector

6. Keep under review regulations and policies related to the Omanisation Policy for the tourism sector

Coordinate

7. Co-ordinate activities across government departments related to tourism human resources development to ensure coordinated action that is in the overall long-term and sustainable interest of the tourism industry

8. Coordinate data collection through surveys and other research activities to improve data availability regarding tourism human resources and tourism education

Working with other Ministries, Tourism Education and Training Institutions and Tourism Industry Employers

9. Review the outcomes of surveys responding and making recommendations for improvements as appropriate

10. Develop and implement policies for tourism human resource development
11. Discuss relevant and emerging issues related to tourism human resources and take appropriate measures as necessary

**Reporting**

12. Prepare an annual report on tourism human resource development issues

**Standing Orders**

- The Committee will meet at least three times a year
- The committee will be deemed to be quorate when at least half of the membership is present.
- Nominated members will normally serve for a period of three years

**Secretariat:**
A newly established Human Resources Department within MoT to act as Secretariat for ONTHRDC to prepare agendas, working documents and policy proposals for ONTHRDC meetings, coordinate tourism human resource research activities, disseminate Meeting Minutes and liaise with other MoT Departments (Promotion, Licensing, Investments, Statistics). The Secretariat would also be responsible for undertaking any topical research commissioned by the ONTHRDC on human resources/labour issues affecting the tourism sector in conjunction with ONTHRDC members.

**BUDGET: To be proposed by MoT**
STRATEGIC OBJECTIVE 2  STRENGTHEN OMANISATION POLICY IMPLEMENTATION

The development, implementation and monitoring of Omanisation Policy is seen as a national priority. As such, it requires coordinated and concerted effort from Government agencies and it can not be done without the cooperation and compliance of the private sector. There is, therefore, a need for increased dialogue between the public and the private sector for better information exchange and for the policies and targets to be accepted by the employers.

This objective will be met through the review and setting of new Omanisation targets for the tourism industry for the next five year period (2011-2015). The current targets need to be revised to levels that take into account the current conditions and planned growth of the tourism sector. It must be stressed that the process of nationalizing the tourism human resources (the tourism labour market) in the country must take into account the socio-cultural context of the country and it should be done in a carefully managed and phased manner to allow the local population to get the know the sector and the types of jobs it offers. It also must be stressed that some aspects of the industry such as the working shifts and the existence of alcohol in hotels and in tourist restaurants acts as barrier to Omanisation both in real terms and because these impact on the image of tourism sector beyond the hospitality segment of it. Another point to stress is that high end tourism requires high levels of service quality and, accordingly, qualified and motivated employees. It is therefore recommended and emphasized that Omanisation Policy in relation to the tourism sector should be managed in a manner that does not impact negatively on the overall tourism product and service quality levels.

It is also recommended for new Omanisation targets to be set for the next five year period and these will be reviewed through the ONTHRDC platform. Furthermore, it is also recommended to review the minimum salaries set in the context of the Omanisation Policy and to raise them to a level that raises the comparative attractiveness of tourism sector jobs in the economy. The Action Plan suggests a mechanism for strengthened dialogue between the public and private sectors regarding the policy and suggest ONTHRDC as a mechanism for this. The monitoring of policy implementation is also overseen through ONTHRDC in collaboration with the Joint Omanisation Committee for the Travel and Tourism Sector.

The setting and monitoring of Omanisation targets currently includes five tourism sub-sectors and this classification should be further developed in collaboration with the Ministry of National Economy and Ministry of Manpower to bring it in line with the classification of tourism sector activities to be adopted for all other data collection purposes and in line with the UNWTO Tourism Satellite Account mechanism. This process should be driven through ONTHRDC.

Omanisation can be promoted through higher Omanisation targets in certain functional areas of tourism businesses and for certain occupations. These would include but not be limited to jobs that are in the marketing, finance and human resources functional areas and in jobs such as front desk and reservations where there is no direct contact with alcohol. This can be best implemented through a working document prepared by ONTHRDC Secretariat and reviewed by ONTHRDC.
STRATEGIC OBJECTIVE 3

ENHANCE PUBLIC AWARENESS OF TOURISM AND IMPROVE THE IMAGE OF TOURISM AS AN EMPLOYER AND INDUSTRY

To achieve this Objective, the Action Plan is built around three key activities: To raise awareness about tourism and to improve its image amongst the Omani population; to increase student recruitment into tourism and hospitality programmes; and to improve the working conditions in the tourism industry in line with the Decent Work Agenda.

The first objective can be achieved through awareness raising initiatives such as designing public tourism awareness campaigns. Such awareness campaigns can be implemented through the use of a range of communications tools, not least the media, in order to highlight positive aspects of the tourism industry in Oman, and its role and significance and the jobs it offers. The Ministry of Tourism’s Tourism Human Resource Department, together with its DG Tourism Promotion can work together to develop such a campaign. There is also a need to better reach wider sections of the national population through conducting outreach workshops to the population in the different regions. MoT through its Tourism Human Resource Department and DG Tourism Promotion can develop a presentation that can be delivered as part of a roadshow in the regions or through the regional MoT Departments. Furthermore, communications products should be produced, such as a brochure, for distribution to different sections of society, including local communities, secondary schools and university students about tourism in the Sultanate, in collaboration between MoT Tourism Human Resource Department and MoT DG Tourism Promotion.

The second objective focuses on increasing student recruitment to tourism higher education and vocational training institutions. There is a need for improved communication and cooperation in the area of MoM funding of tourism related training and this can be best achieved through reviewing the funding mechanism through ONTHRDC. Education and training institutions can also actively raise awareness of their programmes through carrying out regular visits and lectures at secondary schools to raise awareness about their programmes and the tourism sector and also through raising awareness through the career advisors at schools who would need to be trained for this. There is also scope for Government Agencies and tourism enterprises to also play a more active role in promoting the sector as an employer and viable career choice by establishing joint activities and campaigns to recruit students.

The third objective is related to improving the working conditions of tourism sector employees in the context of the ILO UNWTO Decent Work Agenda initiative (for Joint ILO UNWTO Statement please refer to Appendix). Improving the working conditions in the sector is vital for ensuring the industry has a stable, committed and motivated human resources base to deliver the overall tourism development strategy of the Sultanate.
STRATEGIC OBJECTIVE 4

STRENGTHEN TOURISM EDUCATION/JOB TRAINING AND STUDENT EMPLOYMENT

Objective 4 consists of four parts. The first relates to strengthening tourism education curriculum. This can be driven through a comprehensive subject review set up by the Ministry of Higher Education in collaboration with Ministry of Tourism for colleges and universities. For the training colleges a similar process can be applied but through the cooperation between Ministry of Manpower and Ministry of Tourism. Both review panels require external independent advisors to allow benchmarking with international practice and the process can be driven through ONTHRDC.

Curriculum development can be facilitated by becoming a UNWTO.TedQual certified institution. The certification promotes tourism education quality and will assist institutions to network and to continuously update their curriculum and teaching and learning mechanisms through adherence to quality standards and the exposure to international best practice (for further information on the UNWTO.TedQual Certification please refer to the Appendix). Currently Sultan Qaboos University and Oman Tourism College are identified as possible candidates for such certification but later other institutions might wish to consider to apply.

The second part is related to strengthening the employability of students from tourism education and training institutions. To meet this objective is vital to the success of the Action Plan implementation as without a better alignment of industry needs and education outputs the tourism industry will not benefit from locally trained talent and unemployed graduates will impact negative on the tourism education sector and on the tourism industry in general. Central to this issue is improved dialogue between the tourism employers and education and training institutions and mechanisms through which graduates who expect highly paid managerial jobs but are not ready for it without further on-the-job training receive the necessary training and if proved capable put on an accelerated career progression path. This can not be forced on the industry but can be promoted through ONTHRDC mechanisms. Furthermore, education and training institutions need to develop more robust monitoring systems of graduate employment through alumni networks or other data collection mechanisms.

The third point is to increase capacity and diversity of tourism education and training provision. Whilst the overall recommendation is NOT to increase the capacity of tourism education and training provision immediately but to improve capacity utilization in the immediate future, there is a need for new programmes such as IATA Certified training for the air transport and tour operator/travel agency sector and for such training to reach the regions outside of Muscat. There is also a scope to develop Masters Programmes in the field of tourism and a PhD programme – at a later stage. Regarding the Masters Programme, currently Sultan Qaboos University and GuTech have the potential to successfully develop such a programme.

The fourth issue is to strengthen on-the job skills training and increase professionalism amongst tourism employees. This is primarily the responsibility of tourism sector companies. The initiatives recommended in the Action Plan can be best driven through ONTHRDC. The formation of Professional Associations needs to be considered through ONTHRDC.
STRATEGIC OBJECTIVE 5  

MONITORING AND EVALUATION OF ACTION PLAN IMPLEMENTATION

The implementation of the Action Plan needs to be monitored and evaluated on an annual basis through the ONTHRDC. Implementation to be reviewed and adjusted annually on the basis of progress and with regard to the development stages of the tourism industry. In order to ensure continuity and to assist with the Action Plan implementation it is recommended that the UNWTO continues to support MoT in the monitoring and evaluation process, particularly during the early stages, by providing further assistance in an advisory capacity.
### 5.3 ACTION PLAN

<table>
<thead>
<tr>
<th>INTENDED OBJECTIVE</th>
<th>OUTPUT TARGET/INDICATORS</th>
<th>INDICATIVE ACTIVITIES</th>
<th>INPUTS</th>
</tr>
</thead>
</table>
| **1. Establish New Coordination Mechanism to Strengthen Planning, Monitoring and Partnership for National Level Human Resource Development Policy in the Tourism Sector** | 1.1 Formulate Oman National Tourism Human Resources Development Committee (ONTHRDC) | - Oversee, drive and monitor the implementation of the Action Plan  
- Meet quarterly to discuss strategic tourism HRD issues  
- Commission research related to tourism human resources development and tourism labour market issues  
- Harmonise data collection methods on tourism employment issues with Ministry of National Economy and Ministry of Manpower | - MoT to commit budget for holding meetings, commissioning research and reports, information dissemination, organization of media related and awareness raising events  
**ANNUAL BUDGET:** |
| 1.2 Strengthen Tourism Human Resources Department/Unit within MoT to act as Secretariat for ONTHRDC | • Act as Secretariat for ONTHRDC  
• Prepare agendas, working documents and policy proposals for ONTHRDC meetings  
• Coordinate tourism human resource research activities  
• Disseminate Meeting Minutes  
Liaise with other MoT Departments (Promotion, Licensing, Investments, Statistics) in national level human resource development issues | • The new Secretariat to employ 3 specialists and 2 administrators specifically dealing with ONTHRDC matters  
• Office space  
• **ANNUAL BUDGET:**  

| • Organize media related events and activities to publicise tourism human resource development initiatives and policy developments  
• Organize tourism human resources development awareness raising workshops and conferences |
<table>
<thead>
<tr>
<th>2. STRENGTHEN OMANISATION POLICY IMPLEMENTATION</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>2.1 Review and Set Omanisation targets for the Tourism Industry for 2011-2005</strong></td>
</tr>
<tr>
<td>• Set new Omanisation targets for the tourism industry for the next five year period</td>
</tr>
<tr>
<td>• Develop Omanisation policy for the new tourism sectors including ITCs</td>
</tr>
<tr>
<td>• ONTHRDC Secretariat to prepare discussion document on Omanisation targets for discussion and approval at ONTHRDC Meeting</td>
</tr>
<tr>
<td><strong>2.2 Strengthen Dialogue between Government and Employers Regarding Omanisation Policy</strong></td>
</tr>
<tr>
<td>• Review Omanisation Policy issues and policy implementation with all stakeholders at ONTHRDC meetings</td>
</tr>
<tr>
<td>• Use ONTHRDC as a forum for discussing Omanisation Policy related issues with all stakeholders (public and private sector and tourism education and training institutions)</td>
</tr>
<tr>
<td><strong>2.3 Develop a Standard Classification of Tourism Industry Sub-Sectors in line with UNWTO Tourism Satellite Account Classification</strong></td>
</tr>
<tr>
<td>• Develop a new classification system for tourism industry sub-sectors</td>
</tr>
<tr>
<td>• Ministry of Tourism, Ministry of National Economy and Ministry of Manpower to cooperate through ONTHRDC</td>
</tr>
<tr>
<td>2.4 Increase Minimum Wages for the Tourism Industry</td>
</tr>
<tr>
<td>2.5 Set Differential Omanisation Targets for certain Functional Areas and for Jobs</td>
</tr>
<tr>
<td>2.6 Improve Omanisation Policy Communication</td>
</tr>
</tbody>
</table>
| 2.7 Monitor Omanisation Policy Implementation | - Monitor progress and issues related to Omanisation policy in the tourism sector through research and coordinated data collection with Ministry of National Economy and Ministry of Manpower  
- Yearly report on Omanisation in the Tourism Industry to be produced | - ONTHRDC to commission research and reports  
- ONTHRDC to act as a vehicle to harmonise data collection activities between different government agencies  
- ONTHRDC Secretariat to produce yearly report |
### 3. ENHANCE PUBLIC AWARENESS OF TOURISM AND IMPROVE THE IMAGE OF TOURIS, AS AN EMPLOYER AND INDUSTRY

<table>
<thead>
<tr>
<th>3.1 Position the tourism industry as an attractive career choice</th>
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<tbody>
<tr>
<td>• Design and deliver a public awareness campaign to general population about tourism through media (television and newspapers)</td>
</tr>
<tr>
<td>• MoT Tourism Human Resource Department together with MoT DG Tourism Promotion to design and commission campaign</td>
</tr>
<tr>
<td>• <strong>ANNUAL BUDGET:</strong></td>
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</tbody>
</table>

<p>| • Organize outreach workshops for the Omani population in the regions about the role and significance of tourism in Oman |
| • MoT Tourism Human Resource Department and DG Promotion to develop a presentation and to organize and commission visits to regions to hold workshops and meetings with local population |
| • <strong>ANNUAL BUDGET:</strong> |</p>
<table>
<thead>
<tr>
<th>3.2 Improve student recruitment into current tourism education and training institutions</th>
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<tbody>
<tr>
<td><strong>Design and distribute information brochures to be distributed at schools and to community groups</strong></td>
</tr>
<tr>
<td><strong>MoT Tourism Human Resource Department together with MoT DG Tourism Promotion to design and distribute information brochures to schools and community groups</strong></td>
</tr>
<tr>
<td><strong>BUDGET:</strong></td>
</tr>
<tr>
<td><strong>Review funding mechanism for tourism training provision by Ministry of Manpower</strong></td>
</tr>
<tr>
<td><strong>ONTHRDC to review the current funding mechanism and budget allocation and make recommendations to Ministry of Manpower</strong></td>
</tr>
<tr>
<td><strong>Improve dialogue between Ministry of Tourism, Ministry of Manpower and Training Institutions through ONTHRDC Meetings</strong></td>
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<tr>
<td><strong>Introduce tourism awareness subject in school curriculum</strong></td>
</tr>
<tr>
<td><strong>ONTHRDC to review the proposal</strong></td>
</tr>
<tr>
<td><strong>MoT Tourism Human Resource Development department to work with Ministry of Education to develop curriculum</strong></td>
</tr>
<tr>
<td><strong>ANNUAL BUDGET:</strong></td>
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<tr>
<td>3.3 Promote the Decent Work Agenda in Tourism to Improve the Working Conditions in the Sector</td>
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<tr>
<td>• Deliver outreach lectures to secondary school students about the role and significance of tourism in Oman</td>
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<tr>
<td>• Tourism Education and Training Institutions to deliver regular outreach lectures to secondary school students</td>
</tr>
<tr>
<td>• Provide career advisory for secondary school students</td>
</tr>
<tr>
<td>• ONTHRDC to organize training and awareness workshops for school career advisors/school managers</td>
</tr>
<tr>
<td>• Develop innovative and flexible working schemes to encourage Omanis to take up tourism sector employment, particularly for female employees</td>
</tr>
<tr>
<td>• ONTRDC to develop a Working Paper for discussion at ONTRDC meeting</td>
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<tr>
<td>• Improve working hours and working conditions for tourism industry employees</td>
</tr>
<tr>
<td>• ONTRDC to liaise with Ministry of Labour regarding labour law and inspections</td>
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<tr>
<td>• Promote decent pay for tourism sector employees</td>
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<tr>
<td>• ONTRDC to raise issue with financial institutions</td>
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<tr>
<td>• Review access to bank loans by tourism sector employees and entrepreneurs</td>
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</table>
4. STRENGTHEN TOURISM EDUCATION/JOB TRAINING AND STUDENT EMPLOYMENT

<table>
<thead>
<tr>
<th>4.1 Strengthen Tourism Curriculum</th>
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<tbody>
<tr>
<td>• Set up a Subject Review Panel for the review of tourism education curriculum</td>
</tr>
<tr>
<td>• Set up Subject Review Panel for the tourism training sector</td>
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<tr>
<td>• Develop tourism subject benchmark statements</td>
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<p>| • Ministry of Higher Education in collaboration with MoT Tourism Human Resource Development to nominate curriculum review panel and commission tourism curriculum review |
| • Ministry of Manpower in collaboration with MoT Tourism Human Resource Development to nominate curriculum review panel and commission tourism training curriculum review |
| • Ministry of Tourism, Ministry of Manpower and Ministry of Higher Education to nominate panel for the development of tourism subject benchmark statement |</p>
<table>
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<tr>
<th>Action</th>
<th>Details</th>
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</table>
| • Apply for UNWTO.TedQual Certification for tourism education and training provision | • Sultan Qaboos University of Oman Tourism College to apply for UNWTO.TedQual Certification
• Later other Institutions might wish to apply in line with development and consolidation of their programme |
<p>| • Integrate into curriculum organizational values and professionalism | • Tourism Education and Training Institutions to strengthen their curriculum to teach professionalism and organizational values to their students |
| • Strengthen curriculum in foreign languages, particularly English | • ONTHRDC to raise the issue and lobby with Ministry of Higher Education, Ministry of Manpower and Ministry of Education to strengthen foreign language and particularly English language teaching through teacher training and increase of teaching hours |
| • Remove BA in Tour Guiding from Sultan Qaboos University portfolio | • Sultan Qaboos University to remove the programme from its portfolio |
| • Set up Institute of Tour Guiding for Professional Certification and training provision | • MoT Licensing Department with Oman Tourism College to collaborate on the setting up of the Tour Guiding |</p>
<table>
<thead>
<tr>
<th>Institute for Professional Certification and training provision</th>
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<tbody>
<tr>
<td>• Licensing of Tour Guides to remain with MoT</td>
</tr>
<tr>
<td>• Strengthen licensing mechanism for tour guides</td>
</tr>
<tr>
<td>• MoT Licensing Department with Oman Tourism College to collaborate on the development of tour guide licensing mechanism</td>
</tr>
<tr>
<td>• Licensing to be monitored and enforced</td>
</tr>
<tr>
<td>• Re-licensing mechanism to be strengthened and rules communicated</td>
</tr>
<tr>
<td>• Strengthen training provision in the areas of:</td>
</tr>
<tr>
<td>• Hotel Management</td>
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<td>• Customer service</td>
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<td>• Languages</td>
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<td>• IT</td>
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<tr>
<td>• Reservation Systems</td>
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<tr>
<td>• Tourism education and training institutions to strengthen curriculum in these areas</td>
</tr>
<tr>
<td>4.2 Strengthen employability in tourism industry of students from tourism education and training programmes</td>
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<tr>
<td><strong>• Develop systems for the efficient monitoring of student employability and employment destinations</strong></td>
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</tbody>
</table>

| 4.3 Increase Capacity and Diversity Tourism Education and Training Provision |
|---|---|---|
| **• Set up an IATA Approved training school in Muscat** | **• ONTHRDC to lobby with tourism companies to develop structured management training programmes for graduates** |

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<tr>
<td><strong>Strengthen industrial placement (work experience) programme for students</strong></td>
<td><strong>Tourism education and training institutions</strong></td>
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<tr>
<td><strong>• Develop 1-2 year Management Training Programmes</strong></td>
<td><strong>ONTHRDC to lobby with tourism companies to develop structured management training programmes for graduates</strong></td>
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<tbody>
<tr>
<td><strong>Set up an IATA Approved training school in regions (Dhofar, Sohar, Musandam)</strong></td>
<td><strong>Oman Air to set up school</strong></td>
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<tr>
<td><strong>• Develop Muriya Hotel School into a model secondary school level vocational training in tourism and hospitality</strong></td>
<td><strong>ONTHRDC to monitor annually progress</strong></td>
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<tr>
<td><strong>• Establish Secondary School level Vocational Training Centre in key regions (Dhofar, Al Batinah,</strong></td>
<td><strong>Ministry of Education in collaboration with Ministry of Tourism through ONTHRDC</strong></td>
</tr>
<tr>
<td>A’Sharquiyah and Musandam regions</td>
<td>Sultan Qaboos University</td>
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<tr>
<td>Establish Master’s level Programme in areas of:</td>
<td>Establish PhD Programme in Tourism</td>
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<tr>
<td>• Tourism Marketing</td>
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<tr>
<td>• Tourism Heritage Management</td>
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<tr>
<td>• Event Management</td>
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4.4. Strengthen On-the-Job Skills Training and Increase Professionalism

| • Increase the level of training provision to tourism industry employees | • ONTHRDC to work with companies to ensure that training forms an essential part of an employee’s contract | • ONTHRDC to develop and joint MoT-Tourism Industry Training Fund |
| • Strengthen exposure of managers to international industry practices | • Train Senior Managers in more mature tourist destinations | |
| • Develop professional associations in Tourism | • Professional Associations to be developed through industry representatives and ONTHRDC | |
### 5. MONITORING AND EVALUATION OF ACTION PLAN IMPLEMENTATION

| 5.1 Monitor and Evaluate Action Plan Implementation | • Action Plan implementation to be monitored and evaluated on an annual basis | • ONTHRDC and its Secretariat to conduct research and evaluation and prepare an Annual Report on progress  
• UNWTO-MoT Project Team to remain involved in advisory capacity in the monitoring and evaluation process to assist implementation and ensure continuity |

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### Monitoring and Evaluation

<table>
<thead>
<tr>
<th>OUTPUT</th>
<th>SUCCESS CRITERIA</th>
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</table>
| Output 1: ESTABLISH NEW COORDINATION MECHANISM TO STRENGTHEN PLANNING, MONITORING AND PARTNERSHIP FOR NATIONAL LEVEL HUMAN RESOURCE DEVELOPMENT POLICY IN THE TOURISM SECTOR |  • A strengthened human resources department within MoT to liaise with the industry and provide policy research support on HR issues in the tourism sector  
• Establishment of the Oman National Tourism Human Resources Development Committee (ONTHRDC) with Secretariat support from MoT  
• The ONTHRDC has held a first meeting and adopted a common agenda and plan to work with all its members to agreed on the future roles and responsibilities of the committee |
| Output 2: STRENGTHEN OMANISATION POLICY IMPLEMENTATION |  • Omanisation targets set for 2011-2015 period  
• New Omanisation targets approved at ONTHRDC meeting  
• Standard Classifications system for tourism employment is developed  
• Developed new monitoring system for Omanisation targets |
| Output 3: ENHANCE PUBLIC AWARENESS OF TOURISM AND IMPROVE THE IMAGE OF TOURISM, AS AN EMPLOYER AND INDUSTRY |  • A tourism awareness strategy is developed  
• Recruitment to tourism education and training institutions increased  
• Training funding mechanism is reviewed  
• Prepared strategy document for promoting Decent Work Agenda |
| Output 4: STRENGTHEN TOURISM EDUCATION/JOB TRAINING AND STUDENT EMPLOYMENT |  • Tourism Subject Review is conducted  
• Institution(s) gained UNWTO.TedQual Certification  
• Developed monitoring system for tracking student employability  
• Muriya school graduated first batch of students  
• Masters Programme in Tourism is established  
• PhD Programme in Tourism is established  
• New Tourism Education and Training Programmes established |
| Output 5: MONITORING AND EVALUATION OF ACTION PLAN IMPLEMENTATION |  • ONTHRDC received first annual review document |
This Section provides seven best practice examples. These best practices were identified and selected to assist with the implementation of the Tourism Human Resource Development Action Plan 2011-2020 and so that all organisations with an interest in improving human resources can consider how certain practices may be learned from and applied to Oman. The best practice examples cover different areas of the Action plan, from coordination mechanisms to tour guide training and certification and tourism education curriculum development.

The eight best practice examples are as follows:

1. QAA (UK) Subject Benchmark Statements for Hospitality, Leisure, Sport and Tourism
2. Canadian Tourism Human Resource Council
3. Caribbean Tourism Human Resource Council
4. Failte Ireland
5. Institute of Tour Guiding, Blue Badge Guide UK
6. UNWTO TedQUal Certified Institutions
7. Professional Training at University of Surrey, UK
Benefits from Best Practice Example:

Subject benchmark statements provide a means for the academic community to describe the nature and characteristics of programmes in a specific subject. They also represent general expectations about the standards for the award of qualifications at a given level and articulate the attributes and capabilities that those possessing such qualifications should be able to demonstrate.

This subject benchmark statement, together with the others published concurrently, refers to the Bachelors degree with honours.

Subject benchmark statements are used for a variety of purposes. Primarily, they are an important external source of reference for higher education institutions when new programmes are being designed and developed in a subject area. They provide general guidance for articulating the learning outcomes associated with the programme but are not a specification of a detailed curriculum in the subject. Benchmark statements provide for variety and flexibility in the design of programmes and encourage innovation within an agreed overall framework.

Subject benchmark statements also provide support to institutions in pursuit of internal quality assurance. They enable the learning outcomes specified for a particular programme to be reviewed and evaluated against agreed general expectations about standards.

Finally, subject benchmark statements are one of a number of external sources of information that are drawn upon for the purposes of academic review* and for making judgements about threshold standards being met. Reviewers do not use subject benchmark statements as a crude checklist for these purposes however. Rather, they are used in conjunction with the relevant programme specifications, the institution's own internal evaluation documentation, together with primary data in order to enable reviewers to come to a rounded judgement based on a broad range of evidence.
Best Practice Example: Benchmark Statements for Tourism

The benchmarking of academic standards for this subject area has been undertaken by a group of subject specialists drawn from and acting on behalf of the subject community. The group’s work was facilitated by the Quality Assurance Agency for Higher Education, which publishes and distributes this statement and other benchmarking statements developed by similar subject-specific groups.

The statement represents the first attempt to make explicit the general academic characteristics and standards of an honours degree in this subject area, in the UK.

In due course, but not before July 2003, the statement will be revised to reflect developments in the subject and the experiences of institutions and academic reviewers who are working with it. The Agency will initiate revision and, in collaboration with the subject community, will establish a group to consider and make any necessary modifications to the statement.

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* academic review in this context refers to the Agency’s new arrangements for external assurance of quality and standards. Further information regarding these may be found in the Handbook for Academic Review, which can be found on the Agency’s web site.

Academic standards - Hospitality, Leisure, Sport and Tourism

1. Introduction

1.1 All of the subjects in this unit share a concern for enriching the life experiences of people, both as consumers, participants and providers, of Hospitality, Leisure, Sport and Tourism. The industry sector itself is characterised by growth, diversity, vitality and volatility. The scale of provision in higher education is significant, in the UK there are 146 providers of higher education in these subjects, ranging from Certificates in Higher Education to Research Degrees. This document deals only with named single honours degrees.

1.2 Each of the four subjects embraced within Unit 25 displays the characteristics of substantive domains of study that are worthy of intellectual pursuit in their own right. Distinct academic communities are engaged in building bodies of knowledge through scholarship and research. A valuable by-product of this exercise has been the bringing together of a number of subject associations for the first time. The creation and development of knowledge in these subjects is typically achieved both inductively
through the development of theory and deductively through an engagement with practice. All programmes are multi-disciplinary with most having an applied and inter-disciplinary focus. There are active links with professional bodies and associations, with employers, and also with National Training Organisations (NTOs). Where appropriate national occupational standards exist they have helped to inform the subject specific guidelines (Section 6).

1.3 The Unit is characterised by a breadth of subject matter ranging from the Natural Sciences, through Business Management, to aspects of Geography and Cultural Studies. Despite this diversity, there are many areas of common knowledge and understanding and it is these areas of congruence that are addressed in the statement of knowledge and skills (Section 3). Section 6 offers subject specific guidelines to assist in the development of programme specifications. Institutions will find sufficient flexibility in this benchmark to facilitate the design and provision of programmes of study.

2. Mapping the territory

2.1. Introduction

In this section we identify, in general terms, what programmes in each of the four subjects will typically involve (Sections 2.2 to 2.5). It is expected that these benchmark statements will be used for programmes which have as a substantive core, Hospitality, Leisure, Sport and Tourism as set out in section 2.2 to 2.5.

Common to all programmes is the opportunity to learn through the integration of theory with practice. Although students are expected to engage with a challenging and suitable range of theories, concepts and principles, the applied context within which a student learns is a driver for many programmes of study in this Unit. It is this focus on the specific context of study that makes programmes in Unit 25 distinctive. Degree titles may include the terms 'management', 'science' 'studies' (Section 3.6). However they all share application to a particular context or industry. Programmes within Unit 25 may include more than one of the four areas described in Sections 2.2 to 2.5 and will reflect one of the three approaches in 3.6.

2.2. Programmes broadly concerned with Hospitality

Programmes of study with hospitality in the title will subscribe to the following definition:
'Hospitality is characterised by a core which addresses the management of food, beverage and/or accommodation in a service context'.

The defining characteristic of any programme will be the study of the management and technical disciplines relevant to hospitality. It is expected that the learning and assessment experience of all students will be contextualised to the areas covered by this definition.
Provision of hospitality education stems from a highly vocational focus. Programmes in hospitality have evolved significantly beyond this vocational focus to combine technical, management and scientific disciplines as a coherent whole.

Within hospitality, programmes in hotel and restaurant management, food studies, culinary arts and international hospitality management offer students some degree of specialisation. The diversity of the hospitality industry has also led to the development of new areas for study such as licensed retail management and events management.

It is expected that this diversity will be maintained so that institutions can respond to the constantly evolving needs of students and employers. Most programmes will approach the study of hospitality with an emphasis on management.

Hospitality degree programmes will, typically, involve the following components:

- the management of technical operations such as food and beverage and accommodation
- the management disciplines within the context of hospitality
- the hospitality industry and its global environment
- the hospitality consumer and the service encounter
- the opportunity to participate in a period of industrial placement.

Typical subject areas might include food and beverage production and service, facilities management, design and planning, food safety, quality assurance, food science and microbiology, operations management, human resources management, law, services marketing, consumer behaviour, financial management, organisational behaviour, strategic management, small business management, entrepreneurship, information technology. In addition students will normally be given the chance for specialist study which might include languages, licensed retail, tourism and leisure management.

1 HEFCE (1997) Review of Hospitality

2.3 Programmes broadly concerned with Leisure

Programmes of study with leisure in the title can, but may not necessarily, encompass recreation, countryside activities, popular leisure, play, tourism, sport and the arts. In the context of these benchmarking statements, the nature of leisure is taken to mean the full range of activities, processes and meanings associated with non-work time, although not exclusively so, recognizing that the boundaries between work and leisure are blurred. This would specifically include both rational recreation forms as well as forms of cultural consumption often connected with the popular and commercial sectors. While some aspects of the study of leisure will focus upon, or around, purpose-built facilities these are not the only resources or practices that may be associated with leisure programmes. Thus, the term "leisure" refers to a broad range of cultural and recreational activities and experiences by which people through engagement in a variety of formal or informal modes of participation, seek to enhance the quality of their lives.

The growth of degree programmes in leisure reflects the present organisation of work and the attendant implications for societies. Programmes have rapidly increased in
number over the past fifteen years in response to structural changes in society, including the decline of manufacturing, the growth of the leisure industries and a parallel expansion in applied leisure research. The outcome has been diversity and a wide ranging number of programmes which cover a variety of areas including the public, private and voluntary organised sector of this fast growing industry.

Leisure has grown into a flourishing inter-disciplinary field of academic endeavour underpinned by a number of academic associations, internationally recognised journals and a substantive literature. Many programmes reflect this inter-disciplinary perspective and consequently leisure is studied for its inherent contribution to an understanding of contemporary society, as well as because this will contribute to the student's employability and career preparation.

While most programmes include some consideration of all of the areas of study below, different courses have different emphases. Many programmes have management in the title. Some of these focus particularly on business or organisational management. Others with management in the title are more concerned with the management of leisure resources through concepts of planning and policy. The honours graduate will satisfy the characteristics of one of the two principal approaches of "Studies" or "Management" (Section 3.6.).

Leisure degree programmes will typically involve the study of one or more of the following:

- historical, philosophical, economic, political, sociological and psychological dimensions of leisure
- the structure, composition and management of the leisure industries
- the construction of the leisure experience in a range of managerial contexts comprising products, services and opportunities
- the disaggregation of leisure into concepts, activities, functions and meanings and the implications of these for personal and professional actions
- differential patterns of leisure consumption and use
- key directions and trends in the assembly of knowledge about leisure

Typical subject areas might include: concepts of leisure, the leisure environment, women's studies, the sociology of leisure, the philosophy of leisure, sports studies, countryside recreation studies, arts and entertainment, recreation, leisure economics, leisure events, events management, leisure operations, leisure development, leisure policy, leisure planning, leisure resources management, leisure facilities management, leisure strategies and the management of leisure.

2.4. Programmes broadly concerned with Sport

In programmes of study with sport in the title, sport refers to personal, social and cultural activity embraced within the participation, organisation, provision, and delivery of sporting activity, as defined by the Council of Europe: ‘Sport means all forms of physical activity which, through casual or organised participation, aim at expressing or improving physical fitness and mental well-being, forming social relationships or obtaining results in competition at all levels’

2. For the most part, the study of sport is centred on socially and
culturally acknowledged forms of sporting activity, and on its performance (both in preparation and execution), provision, and social and cultural impact. Recently there has been increased interest in the relationship between physical activity and health.

Degree programmes in Sport have increased significantly over the past fifteen years in response to the growth in provision and employment in the leisure and service sector, and the interest and demand created by related school and post-school qualifications. The outcome has been innovative and wide-ranging sport-related programmes. Their currency and diversity is demonstrated by the orientation towards sport and exercise sciences, sports coaching, sport development and sport management.

Sport has emerged as an academic area with a developing body of knowledge. This is characterised by a balance of discipline-based knowledge and knowledge derived from the practice of sport. With programmes adopting a multi-disciplinary and/or inter-disciplinary approach, the study of sport has intrinsic intellectual value. At the same time programmes of study will enhance, to a varying extent, the students' employability and career preparation.

The breadth of coverage within sport is substantial and there are considerable differences of emphasis in content and approach to reflect, for example, science-based or management-based programmes of study. It is anticipated there will be a significant degree of flexibility and interpretation when institutions develop their programmes of study within this benchmark framework.

Sport degree programmes will typically involve the study of one or more of the following:

- human responses and adaptations to sport and exercise
- the performance of sport and exercise and its enhancement, monitoring and analysis
- historical, social, political, economic and cultural diffusion, distribution and impact of sport
- policy, planning, management and delivery of sporting opportunities.

Typical subject areas might include: human anatomy and physiology, kinesiology, human growth and development, sport biomechanics, sport nutrition, exercise science, physical education (non Qualified Teacher Status), psychological processes and motor learning, training theory, skill acquisition, coaching process, sports notation, sport injuries, sport psychology, sport strategy, sport technology, sport sociology, Olympic studies, sport economics, sport politics, sport history, sport philosophy, social and cultural issues, sport for special needs, sport law, sport ethics, sport development, sport management, and sport marketing.


2.5. Programmes broadly concerned with Tourism

The term Tourism refers to the phenomena and relationships arising from the travel and stay of people away from their normal home environments for a variety of purposes. Programmes with tourism in the title typically have their origins in providing a vocational
understanding relevant for potential employment in some or all of the components of what is loosely referred to as the tourism industry. This includes activities in the private sector such as tour operators, airlines and hotel companies, as well as public and not-for-profit bodies such as tourist boards.

Most programmes have broadened from their vocational origins to embrace wider issues relating to the nature, impacts and meanings of tourism, thereby furnishing an understanding of what is now a major world phenomenon. However, most programmes still lay emphasis on career and vocational objectives.

Over the past fifteen years the number of programmes in tourism has proliferated. They have a wide range of titles. The most common are 'Tourism Management', 'Tourism', 'Leisure and Tourism Management' and 'Tourism Studies' but also included are other titles reflecting the focus of particular programmes such as 'Travel Agency Management', 'Sports Tourism', 'Rural Tourism', 'Sustainable Tourism'. Of the programmes with management in the title many focus particularly on business management. Others are more concerned with the management of scarce resources in the community through concepts of planning and public policy.

The study of tourism overlaps with subject domains from both within, and outside, Unit 25. To some extent, this is reflected in the trend for more recently validated tourism programmes to incorporate ideas and concepts drawn from, for example, social anthropology, sociology and cultural studies.

Degrees in tourism typically involve the following:

- a consideration of the concepts and characteristics of tourism as an area of academic and applied study
- an examination of the nature and characteristics of tourists
- a study of the products, structure, operations and interactions within the tourism industry
- an analysis of tourism in the communities and environments that it affects.

While most include some consideration of all the above areas of study different programmes have different emphases.

Typical subject areas might include: accommodation for tourists, destination planning and development, geography of tourism, impacts of tourism, international tourism, operation of the tourism industry, passenger transportation, research methods, technology in travel and tourism, tourism and the environment, tourism economics, tourism marketing, tourism policy, tourism management, sustainable tourism.
3. Knowledge and skills

3.1 Introduction

In this section we identify the knowledge and skills of a typical graduate (Section 5) that we would expect to be developed as part of an undergraduate programme. The depth of knowledge, the proficiency of skills and the balance of specific knowledge and skills may differ with the particular programme. This will reflect the approach taken, the context of study and the aims and objectives of the programme. Each institution is free to decide on the content, nature and organisation of the degree programme and its constituent courses/modules, but it is expected that curriculum designers will ensure that the following ‘generic’ knowledge base underpins all programmes, together with the knowledge base given in the subject specific guidelines identified in Section 6. It is also expected that generic knowledge will be set in the subject specific context at all levels of the programme.

The intellectual skills and the key skills identified in 3.3 and 3.5 should also feature in all undergraduate programmes. The skills specific to Unit 25 in 3.4 will be developed variously, depending upon the particular context in which the student is studying.

3.2 Knowledge

Subject specific guidelines are given in Section 6. However, graduates of all programmes in Hospitality, Leisure, Sport or Tourism will be able to demonstrate:

- a critical understanding of the development of knowledge in their particular subject domain
- an understanding of the need for both a multi-disciplinary and inter-disciplinary approach to study, drawing, as appropriate, from service, research and professional contexts
- their understanding of the subject through both academic and professional reflective practice
- their research and problem-solving abilities by critically understanding methods of acquiring, interpreting and analysing information appropriate to their context of study
- an understanding and critical awareness of, the moral, ethical, environmental and legal issues which underpin best practice.

3.3 Intellectual skills

The typical graduates of programmes in Hospitality, Leisure, Sport or Tourism will have developed a range of intellectual skills including being able to:

- research and assess subject specific facts, theories, paradigms, principles and concepts
• critically assess and evaluate evidence
• critically interpret data and text
• describe and analyse information
• apply knowledge to the solution of familiar and unfamiliar problems
• develop a reasoned argument and challenge assumptions
• take responsibility for their own learning and continuing professional development.

3.4 Skills specific to unit 25

Skills will be developed in various ways largely depending upon the subject domain within which the student is studying. The range of skills will normally include some or all of the following with graduates being able to:

• plan, design and execute practical activities using appropriate techniques and procedures
• undertake fieldwork with due regard for safety and risk assessment
• plan, design, execute and communicate a sustained piece of independent intellectual work using appropriate media
• recognise and respond to moral, ethical and safety issues which directly pertain to the subject domain including relevant legislation and professional codes of conduct.

3.5 Key skills

In addition to skills specific to Unit 25, all undergraduate programmes will enable students to develop the following:

• communication and presentation skills
• numeracy and C & IT skills
• interactive and group skills
• problem solving skills
• ability to self-appraise and reflect on practice
• ability to plan and manage learning.

3.6. Approaches to programmes of study in unit 25

Where the programme title contains the word 'Management' then it should inter alia enable students to:

• demonstrate vocationally relevant managerial skills and knowledge by exposure to professional practice
• evaluate and apply vocationally relevant concepts associated with the operational and strategic management of financial, human and physical resources and/or understand and apply concepts associated with the allocation of resources in the community.
Where the programme title contains the word 'Science' then it should *inter alia* enable students to:

- demonstrate an understanding of the philosophical basis of scientific paradigms
- demonstrate evidence of competence in the scientific methods of enquiry, interpretation and analysis of relevant data and appropriate technologies

Where the programme title contains the word 'Studies' then it should *inter alia* enable students to:

- critique the contributions of a range of academic disciplines that have informed the development of the subject as a field of study
- demonstrate an appropriate degree of progression within specialist fields
- display an integrated knowledge of the scope and breadth of the subject domain.

**4. Learning, teaching and assessment**

4.1 Unit 25 encompasses a rich variety of often diverse disciplinary cultures. It also includes a range of patterns of study including full-time, sandwich, part-time and distance learning degree programmes. In particular, some of the programmes within Unit 25 will include as integral some form of extended placement in industry. Some placements will be credit-bearing many will not. It is therefore considered inappropriate to be prescriptive about which specific teaching and assessment methods should be used except that programme teams should be able to justify their choices in terms of the criteria laid out in this document.

4.2 Students reading for a degree in programmes embraced by this Unit should be provided with full documentation on their programme of study and each individual component (course, field, module, unit etc.). Learning, teaching and assessment should be interlinked as part of the curriculum design and development to enable students to develop the knowledge and skills identified in Section 3 of this learning 5 of this benchmark. Assessment methods should be chosen to provide evidence of the achievement of learning outcomes using the performance indicators set out in Section 5. Programmes should be delivered by staff with qualifications or experiences which are relevant to the subject domain.

4.3 The learning and teaching methods that programmes in this Unit have typically included are lectures; tutorials; laboratory practicals; other small group formats; directed reading etc. It is in applying theory to practice that these subject domains adopt distinctive learning, teaching and assessment strategies.

4.4 Learning will be structured to ensure that students are engaged in the subject specific contexts throughout the programme

These will include, *inter alia*:

- learning opportunities in specialised facilities (sports science laboratories, training kitchens and restaurants, sports participation facilities, leisure facilities etc.)
• contact with the industry, or professional bodies (field work and other activities in the external environment, visits, visiting speakers and other professionals in the field, and ‘live’ case studies).
• learning opportunities through the use of specialised items of equipment (HEFCE in separate studies on hospitality management and sports-related provision have identified minimum provision).
• access to relevant applied IT systems.

5. Performance indicators

The performance indicators tabled below are intended to inform programme specifications; to enable course teams to map programmes in development against the benchmark; and to inform the preparation of learning outcomes and assessment criteria. They are not intended to be used as assessment criteria and should not be used to assess individual students.

Knowledge

Threshold Performance

• Demonstrate an understanding of the development of knowledge in their particular subject domain
• Work with a multi-disciplinary and inter-disciplinary approach to study, drawing, as appropriate, from service, research and professional contexts
• Understand and develop their knowledge through academic and professional practice
• Demonstrate their research and problem solving abilities through acquisition, interpretation and analysis of information appropriate to the context of study with some limitations
• Understand and have some critical awareness of, the moral, ethical and legal issues which underpin best practice

Typical Performance

• Demonstrate a critical understanding of the development of knowledge in their particular subject domain
• Work with and evaluate the effectiveness of both a multi-disciplinary and inter-disciplinary approach to study, drawing, as appropriate, from service, research and professional contexts
• Engage with, and develop their knowledge through, academic and professional practice
• Demonstrate their research and problem solving abilities with a critical understanding of methods of acquisition, interpretation and analysis of information appropriate to the context of study
• Demonstrate a substantial critical awareness of the moral, ethical and legal issues which underpin best practice

Excellent Performance
• Demonstrate evidence of an ability to appraise critically and challenge the development of knowledge in their particular subject domain
• Work with, and critically evaluate the effectiveness of both a multi-disciplinary and inter-disciplinary approach to study, drawing, as appropriate from service, research and professional contexts
• Develop their understanding of knowledge of academic and professional practice within a framework of critical evaluation and synthesis
• Demonstrate their research and problem solving abilities with a critical understanding of methods of acquisition, interpretation and analysis of information appropriate to the context of study and in a way which demonstrates capacity for creative and original thought
• Critically appraise and challenge the moral, ethical and legal issues which underpin best practice

Skills Specific to Unit 25

Threshold Performance

• Plan, design and execute practical activities using appropriate techniques and procedures
• Undertake fieldwork with due regard for safety and risk assessment
• Plan, design, execute and communicate a sustained piece of independent work using appropriate media to communicate the findings
• Recognise those moral, ethical and safety issues which directly pertain to the context of study and be aware of relevant legislation and professional codes of conduct

Typical Performance

• Plan, design, manage and evaluate practical activities using appropriate techniques and procedures
• Review and evaluate fieldwork with due regard for safety and risk assessment
• Execute a sustained piece of independent work using appropriate media to communicate the findings in a way which demonstrates the ability to synthesise information and knowledge
• Engage in debate on the moral, ethical and safety issues which directly pertain to the context of study and to react appropriately to legislation and professional codes of conduct

Excellent Performance

• Plan, design, manage and execute practical activities whilst demonstrating high levels of reflective and reflexive skills
• Develop, evaluate and improve fieldwork exercises in ways which demonstrate effective safety and risk assessment
• Execute and disseminate a sustained piece of independent work which provides evidence of critical engagement with and original interpretation of appropriate data
Critically appraise and challenge the moral, ethical and safety issues which directly pertain to the context of study and to respond to legislation and professional codes of conduct in ways which are exemplars of good practice.

**Intellectual Skills**

**Threshold Performance**

- Research and assess subject specific facts, theories, paradigms, principles and concepts
- Assess and evaluate evidence
- Interpret data and text

**Typical Performance**

- Evaluate the importance of subject specific facts, theories, paradigms, principles and concepts in relation to their ability to explain and solve problems.
- Assess and critically evaluate evidence with detailed reference to methodology and the source of the data
- Critically analyse and interpret data and have a detailed understanding of the strengths and weaknesses of the data and textual analysis techniques that they employ

**Excellent Performance**

- Challenge subject specific facts, theories, paradigms, principles and concepts and be able to articulate possible new ways of looking at the subject based on recent research or intellectual insights.
- Assess and critically evaluate evidence with detailed reference to methodology and the source of the data informed by a mature reflection of the students' own developing research and depth of reading
- Critically analyse and interpret data and appraise the strengths and weaknesses of the data and textual analysis techniques they employ and be able to utilise alternative approaches

**Intellectual Skills**

**Threshold Performance**

- Describe and analyse information and be able to develop a basic re-interpretation of key factors
- Develop a reasoned argument and identify basic assumptions
- Take responsibility for their own learning and continuing professional development

**Typical Performance**
• Analyse and synthesise information and present a structured and evidenced reinterpretation of the information which can be used to give an insight into issues relevant to the professional context
• Develop a reasoned and well-structured argument that challenges underlying assumptions
• their own learning and continuing professional development

**Excellent Performance**

• Analyse, synthesise and reinterpret data to show they have developed a capacity for creative and original insight into issues relevant to the professional context
• Sustain a persuasive and logical argument that challenges basic and underlying assumptions from a number of informed perspectives
• Adopt an autonomous approach to their own learning and continuing professional development

6. **Subject-specific guidelines**

6.1. **Introduction**

Each institution providing honours degrees will have its own characteristics with a detailed rationale for the content, nature and organisation of its programmes and modules detailed in the relevant programme specifications. Likewise the distinctive nature of each of the subject domains within Unit 25 is recognised in the manner in which the subject specific guidelines are presented. While it is recognised that programmes in Unit 25 will vary in the depth to which they treat individual subjects it is expected that typical graduates in the subject domain are able to achieve the appropriate learning outcomes identified below.

6.2. **Hospitality**

A typical honours graduate in Hospitality will be able to:

*use technical and interpersonal skills and knowledge to propose and evaluate practical and theoretical solutions to complex problems in the core areas of hospitality:*

• operate and manage human and technical resources
• apply theory to the solution of complex problems within the core areas of hospitality
• analyse and evaluate food, beverage and/or accommodation service systems, their implementation and operation.

*recognise and value the centrality of the hospitality consumer and meet and respond to their needs:*

• understand and apply the theories and concepts underpinning consumer behaviour within the hospitality context
• analyse the needs and expectations of different hospitality consumers and develop appropriate responses
• analyse the quality of the service encounter and its impact on the hospitality consumer and the service provider.

*identify and respond appropriately to the diversity that prevails within the hospitality industry in relation to stakeholders such as:

• hospitality consumers
• hospitality employees
• hospitality organisations
• government and external agencies.

*evaluate and apply, within the hospitality context, appropriate theories and concepts from the generic management areas of:

• operations management
• finance and management accounting
• human resources and organisational behaviour
• services marketing
• information systems and technology
• strategic management.

*analyse and evaluate the defining characteristics of hospitality as a phenomenon:

• critically reflect upon the origin, meanings and development of hospitality
• analyse and reflect on the different cultural concepts of hospitality
• demonstrate a critical awareness of the boundaries of hospitality

*analyse and evaluate the business environment and its impact on the hospitality industry:

• display an insight into the structure of the hospitality industry and the contribution that it makes to the global economy
• analyse and reflect upon the environmental influences which impact on hospitality organisations
• evaluate the factors which influence the development of organisations operating within the hospitality industry
• review and analyse the political, technological, social and economic factors which affect the supply of and demand for hospitality.

Additionally graduates in Hospitality will have sufficient underpinning knowledge and practical experiences to be in a position to achieve NVQ4 shortly after graduation.

6.3. Leisure

A typical honours graduate in Leisure will be able to demonstrate the ability to:
understand, critically evaluate and reflect on issues of lifestyle, consumption and culture as they affect people's leisure lives:

- demonstrate an ability to synthesise inter-disciplinary approaches to issues of consumption and consumerism in leisure markets
- critically reflect on the impact of leisure in the lives of individuals and analyse barriers to participation such as aspects of age, gender, disability etc.
- evaluate the importance of cultural and other diversities in developing access to participation in leisure by specific target groups.

understand the social, political, economic and physical contexts of leisure and analyse the impact of these upon leisure theories:

- critically evaluate the notion of praxis derived from generic disciplines and apply these to a specific leisure context
- analyse and reflect upon the environment in which leisure operations take place
- review and analyse the political and economic factors which affect the supply of, and demands for, leisure
- critically reflect on the nature of policies for leisure across sectoral and administrative boundaries
- critically evaluate the role and impact of global and local leisure structures and organisations.

utilise, and understand the impact of rationales, sources and assumptions embedded in policy, planning and delivery mechanisms in a leisure context:

- operationalise concepts of social, public and business policy and critically analyse their role in leisure supply
- possess the skills to write and critique leisure plans, development plans and to recognise and meet the leisure needs of specific communities
- critically reflect upon the role of those organisations and structures charged with a responsibility for the promotion of leisure or the training of practitioners in leisure ie QUANGOS, NTOs etc.

employ a range of 'leisure specific' facilitation skills in the promotion of professional practice:

- critically reflect upon what it means to work in leisure
- evaluate the impact and role of leisure events in everyday life
- demonstrate the skills necessary both to deliver and reflect upon a leisure experience aimed at a specific group, for example an event or a competition.

6.4 Sport

Programmes of study are orientated towards science, studies or management-based ways of approaching the study of Sport and the selection of learning outcomes, subject content and experiential learning will reflect this. Programmes of study will be designed in such a way as to facilitate the achievement of an appropriate selection of learning outcomes. Institutions will demonstrate an adequate coverage of one or more of the
following four study areas, along with the learning experience necessary to achieve the Unit-specific graduate outcomes. Degrees incorporating the term sport studies will normally be expected to embrace two or more of the four study areas below:

**the study of human responses to sport and exercise:**

- make effective use of knowledge and understanding of the disciplines underpinning human structure and function
- appraise and evaluate the effects of sport and exercise intervention on the participant
- provide a critical appreciation of the relationship between sport and exercise activity and intervention in a variety of participant groups. This will include special populations such as the elderly, disabled and children.

It is anticipated that science-based programmes will embrace the above learning outcomes with subject related content, amongst others.

**the study of the performance of sport and its enhancement, monitoring and analysis:**

- monitor, analyse, diagnose and prescribe action to enhance the learning and performance of the component elements of sport
- evidence the skills required to monitor and evaluate sports performance in laboratories and/or field settings
- display a critical appreciation of the integration of the variables involved in the delivery (teaching, instructing and coaching) of enhanced sport performance.

It is anticipated that science-based programmes will embrace the above learning outcomes with subject related content, amongst others.

**the study of the historical, social, political, economic and cultural diffusion, distribution and impact of sport:**

- display a critical insight into the organisations and structures responsible for sport, and the political ramifications arising from these
- employ social, economic and political theory to explain the development and differentiation of sport throughout society
- demonstrate the application of the social and cultural meanings attached to sport and their impact on participation and regulation.

It is anticipated that studies-based programmes will embrace the above learning outcomes with subject related content, amongst others.

**the study of the policy, planning, management and delivery of sporting opportunities:**

- understand and apply the theories, concepts and principles of practice from the generic management areas of operations, finance, human resources, economics and marketing to sports facilities and events
- employ strategic planning and development planning skills in analysing, understanding and addressing the development needs and intentions of sport organizations and communities
• demonstrate a critical appreciation of sport development and facilitation principles in at least one vocational context.

It is anticipated that management-based programmes will embrace the above learning outcomes with subject related content, amongst others.

6.5. Tourism

A typical honours graduate in Tourism will be able to demonstrate an understanding of:

the concepts and characteristics of tourism as an area of academic and applied study including being able to:

• understand and appreciate the potential contributions of disciplines that help to explain the nature and development of tourism
• explain and challenge theories and concepts which are used to understand tourism
• explain and challenge the definitions, nature and operations of tourism
• demonstrate an understanding of the domestic and international nature and dimensions of tourism
• utilise a range of source material in investigating tourism
• demonstrate an awareness of the dynamic nature of tourism in modern societies
• understand the inter-cultural dimensions of tourism.

the products, structure of and interactions in the tourism industry including being able to:

• demonstrate an understanding of the structure, operation and organisation of the public, private and not-for-profit sectors and their activities
• evaluate the factors that influence the development of organisations operating in tourism
• analyse relations between consumers of tourism and the providers of tourism services.

the role of tourism in the communities and environments that it affects and in particular:

• have an understanding of the relationship between tourism and the communities and environments in which it takes place
• be able to evaluate the contribution and impacts of tourism in social, economic, environmental, political, cultural and other terms
• have an understanding of and be able to evaluate the approaches to managing the development of tourism through concepts of policy and planning
• appreciate the ethical issues associated with the operation and development of tourism.

the nature and characteristics of tourists and in particular:

• be able to explain the patterns and characteristics of tourism demand and the influences on such demand
• have an understanding of the ways in which tourists behave at destinations
• understand the cultural significance of tourism for the tourists and their societies.

Appendix

Award titles

The 'leisure' sector (in its broadest definition) is one of the largest and fastest growing sectors of the global economy. Although there is a core of recognised course titles, it is also a developing area of study with a great deal of innovation and diversity. The benchmarking group has therefore made use of the UCAS directory in identifying those course titles which properly fall within the remit of the group. The current scope of the group is degrees with the following titles:

Hospitality, including: Hospitality Studies; Hotel Management; Hotel and Restaurant Management; Catering Management; Hotel, Catering and Institutional Management; Hotel, Restaurant and Bar Management; Hospitality Business; Hospitality Business Management; European Hospitality Management; International Hospitality Management; International Hotel and Catering Management; Institutional Management; Catering Technology; Culinary Arts; Licensed Retail Management; Events Management; Hotel and Hospitality Management.

Leisure, including: Leisure Studies; Events Management; Facilities Management; International Leisure Management; Countryside Leisure Management; Maritime Leisure Management; Leisure Administration; Leisure Marketing; Adventurous Activities; Leisure Economics; Outdoor Activities; Recreation Studies; Recreation Management; Outdoor Recreation; Entertainment Management; Licensed Entertainment.

Sport, including: Sports Science; Sport and Exercise Sciences; Sports Studies; Sports Management; Community Sport; European Sports Management; Football Science; Sport and the Media; Sports Coaching; Sports Development; Sport Education; Sports Injury/Therapy; Sports Performance Analysis; Sports Technology; Sports Tourism Management; Urban Sports Studies; Coaching Studies; Sports Economics; Exercise Science; Exercise Studies; Exercise Therapy; Fitness Science; Fitness Studies; Health and Fitness Management; Exercise Physiology; Movement Studies; Movement Science; Sports Psychology; Playwork; and Physical Education (non QTS).

Tourism, including: Tourism Studies; Tourism Management; Ecotourism; European Tourism; International Tourism; Rural/Countryside Tourism; Sports Tourism; Sustainable Tourism; Tourism Planning; Adventure Tourism Management; European Tourism Management; International Tourism Management; Rural Tourism Management; Tourism Business Management; Visitor Attractions Management; Tourism Operations Management; Travel and Tourism Management; Travel Management; European Travel Management; International Travel; Travel Agency Management.
BEST PRACTICE EXAMPLE 2
BEST PRACTICE FOR MULTI-SECTOR COLLABORATION

Benefits from Best Practice Example:

The example will demonstrate how the different stakeholders involved in tourism human resources development can be brought together for collaboration.

Best Practice Example: Canadian Tourism Human Resource Council

The CTHRC is a national not-for-profit organization that is governed by a Board of Directors which includes the various “constituencies” in the tourism sector concerned with labour market issues. These constituencies are Business, Labour (or workers), National Industry Associations, Education, National and Provincial Tourism Authorities, Government, and one organization in each province or territory concerned with tourism labour market issues.

The Board of Directors delegates some of its work to a number of Committees, these being the Finance Committee, the Product Quality Committee, and the Research Committee. Staff of the provincial or territorial organizations, which deliver the CTHRC programs and distribute emerit products within their jurisdictions, meet regularly to coordinate their activities. The CTHRC operates with funding from the Sector Council Program of the Government of Canada which has been critical to its research, products, and program development. Revenue is also derived from its wholesale distribution of its emerit brand occupational standards, training, and professional recognition and certification programs.

Q – What is the role of the Council?
A – As Canada’s Tourism Sector Council, the CTHRC brings together industry, labour, government and education to discuss and find solutions to ongoing and pending human resource needs.

Q – What are the main human resources challenges facing the Canadian tourism sector?
A – The pool of youth to draw from is shrinking. This is a key concern for our sector, because tourism has traditionally been dominated by a younger workforce. In Canada overall, 34.9per cent workers are 34 years of age or younger whereas in tourism, 51.3per cent fall into this category. Turnover within the sector is an ongoing challenge. Average turnover rates in the Canadian workforce range from 20.1per cent – 22.9per cent in the last two census periods versus 32.0per cent – 39.6per cent for the tourism sector during the same periods. As an industry, we need to look for ways to decrease this turnover rate, which includes investing in employees through training, flexible work arrangements and on-the-job incentives or “perks”.

At the same time, as the supply side of our industry (its workforce) is decreasing, the demand side is increasing. Research conducted by the Council estimates that well
over 161,309 new jobs will be created in the Canadian tourism sector by the year 2015. Filling these positions will require a focus on attracting and supporting under-represented groups, such as qualified immigrants, Aboriginals, and recent retirees.

Q – What training materials are available to assist me with my HR needs?
A – The CTHRC supplies an impressive range of occupation-specific and business “how to” products through our tourism training brand - emerit. emerit products are designed to assist the industry in attracting, training and retaining employees. You’ll find an extensive selection of online and paper-based training resources available in both French and English at www.emerit.ca.

Q – What does the CTHRC do for the Canadian tourism sector?
A – Through its emerit training brand, the CTHRC provides training products and professional recognition programs that help to reduce employee turnover, ensure a skilled labour force and improve quality of service by ensuring employee knowledge and performance is consistent with the appropriate emerit National Occupational Standards. These standards exist for over 50 tourism occupations in both official languages. They are set by the industry, for the industry and to date nearly 11,000 individuals from across Canada have been Professionally Certified in their tourism occupations and.

Q – What does the CTHRC do to prepare new entrants for a career in tourism?
A - Since 1995, the CTHRC’s highly successful national preparation-for-work program, Ready-to-Work, has introduced and trained over 10,000 individuals for a career in the tourism sector.

The Canadian Academy of Travel and Tourism, another CTHRC initiative, offers tourism courses, projects and activities as part of the high school curriculum in selected schools across Canada. Currently, 75 schools in seven provinces are involved. While the Council and industry are helping youth and other new entrants to make a fresh start, they are also helping to alleviate the problem of under-skilled workers and creating a more positive image for the Canadian tourism sector. Through participation at Career Fairs and Expos as well as presentations across the country, the Council provides career awareness and planning information, through the Discover Tourism program, to attract people to the sector and inform them of the vast array of career options and opportunities available.
BEST PRACTICE EXAMPLE 3

BEST PRACTICE FOR MULTI SECTOR COOPERATION

Benefits from Best Practice Example:

The example will demonstrate how the different stakeholders involved in tourism human resources development can be brought together for collaboration.

Best Practice Example: Caribbean Tourism Human Resource Council

The Caribbean Tourism Organisation, (CTO) with the full endorsement of the CARICOM Heads of Government, established the Caribbean Tourism Human Resource Council (CTHRC) in 1998. It's a regional body made up of senior representatives from business, labour, government, industry associations and education and tourism related organizations/groups who meet twice annually to collaboratively address the Caribbean's tourism education, training and career development needs and to give direction to the Council's programmes and activities.

The Council's mission is to develop and promote a systematic and coordinated approach to human resources planning, research, education and training in Caribbean tourism to meet the demands of a globally competitive tourism environment. Since 2008, this regional body has become the Technical Committee for the CTO's Human Resources Department and gives technical input and guidance to its work programme.
BEST PRACTICE EXAMPLE 4

BEST PRACTICE FOR PROFESSIONAL DEVELOPMENT THROUGH PARTNERSHIP

Example: FAILTE IRELAND

Benefits from Best Practice Example:

The example will demonstrate how continuous professional development can be provided for existing tourism companies and employees.

Best Practice Example:

The example will demonstrate how the different stakeholders involved in tourism human resources development can be brought together for collaboration.

Fáilte Ireland was formed in 2003 under the National Tourism Development Authority Act to guide and promote tourism as a significant driver of the Irish economy. We provide both strategic and practical support to develop and sustain this country as a high-quality and competitive tourist destination.

With a dedicated team working across five regions, Fáilte Ireland acts as a corporate resource for tourism professionals and service providers at local, regional and national levels. We provide those involved, or considering becoming involved in Irish tourism, with a one-stop-shop to meet their business or professional needs.

The Fáilte Ireland Authority (Board) comprises a Chairperson and 12 Members, appointed by the Minister for Arts, Sport and Tourism. Members may be appointed for terms up to five years and each member may be appointed for up to two terms.

Professional Development Programmes

Knowledgeable, skilled and competent people are the key to business success and survival. In the current economic climate, it is perhaps more important than ever, that our employees have the range of competencies and skills needed to weather current business challenges, to ensure sustainability in the short-term and grow competitiveness for the future.

Recognising the changing climate in which we now operate, our range of programmes, workshops, business tools and industry supports, reflect the challenges of our industry’s businesses today.
BEST PRACTICE EXAMPLE 5

BEST PRACTICE FOR TOUR GUIDE CERTIFICATION AND TRAINING

Example: Institute of Tour Guiding, Blue Badge Guides UK

Benefits from Best Practice Example:

The example will demonstrate how tour guide training and certification can be developed.

Best Practice Example:

The example will demonstrate how the different stakeholders involved in tourism human resources development can be brought together for collaboration.

To achieve and maintain recognition of the profession of Tourist Guiding and related occupations and to put in place uniform standards for qualifications at all levels, the Blue Badge being the highest award.

To provide for examinations and/or assessments for qualifications at all levels and to make awards.

To promote the family of qualifications and awards to the public and profession alike, to achieve clarity and greater understanding of the profession and related occupations.

To put in place and enforce a Code of conduct for all those who join the Institute.

To encourage all qualified tourist guides and all those who hold qualifications in related occupations to join the Institute.

To provide professional services for those who join the Institute, including by the publication of an annual National Register.

http://www.itg.org.uk/about_us.asp
BEST PRACTICE EXAMPLE 6

BEST PRACTICE FOR BEST PRACTICE FOR TOURISM EDUCATION DEVELOPMENT

Example: UNWTO TEDQUAL CERTIFIED INSTITUTIONS AND SAMPLE PROGRAMMES

Benefits from Best Practice Example:

The example will demonstrate which tourism and education institutions hold UNWTO Ted.Qual Certification. This can be a guide for future institutional partner selection, for programme and curriculum development.

It is recommended that institutions in Oman seek educational collaboration with Institutions that carry UNWTO.TedQual Certification.

Best Practice Example: UNWTO TedQual Certified Institutions:

- Queensland University (Australia)
- Blue Mountains Hotel School (Australia)
- Centro Universitario da Cidade (Brasil)
- Université de Québec à Montreal (Canadá)
- University of Calgary (Canadá)
- Institute for Tourism Studies - IFT Macao (China)
- Macao University of Science and Technology (China)
- Shenzen Tourism College - Jinan University (China)
- The Hong Kong Polytechnoc University (China)
- Hospitality Ind. Training and Dev. Centre (China)
- Higher Hotel Institue Cyprus (Chipre)
- Universidad Externado de Colombia (Colombia)
• University of Zagreb (Croacia)
• University of Ljubljana (Eslovenia)
• Centro Español de Nuevas Profesiones (España)
• INESTUR (España)
• Universidad de las Islas Baleares (España)
• Universidad Politécnica de Valencia (España)
• California University of Pennsylvania (Estados Unidos)
• Salem State College (Estados Unidos)
• The George Washington University (Estados Unidos)
• University of Hawaii at Manoa (Estados Unidos)
• University of South Pacific (Fiji)
• Le Monde - Inst. of Hotel & Tourism Std. (Grecia)
• NHTV - Breda University (Holanda)
• CST. Università di Perugia (Italia)
• MIB - School of Management (Italia)
• Università del Molisse Termoli (Italia)
• Kenya Utalii College (Kenia)
• International Tourism Faculty - TURIBA (Letonia)
• Universidad Anáhuac del Sur (México)
• Universidad de Anáhuac (México)
• Victoria University of Wellington (Nueva Zelanda)
• CENFOTUR (Perú)
• Universidad San Martín de Porres (Perú)
• Esc. Sup. De Hotelaria e Turismo do Estoril (Portugal)
• Escola Sup. de Educação Viana do Castelo (Portugal)
Sample Programmes offered at selected UNWTO TedQual Institutions

➢ MIDDLE EAST

Currently there is no institution with UNWTO TedQual Certification

➢ EUROPE

Institution: University of Surrey, UK
Department: School of Management

Programmes:

Undergraduate
- Tourism Management
- International Tourism and Hospitality Management

Postgraduate
- Tourism Management
- Tourism Development
- Tourism Marketing
- PhD
➢ AUSTRALIA

Institution: University of Queensland
Department: School of Tourism

Undergraduate

• International Hotel and Tourism Management

Postgraduate

• Graduate Certificate in International Hotel and Tourism Management
• Graduate Diploma in International Hotel and Tourism Management
• Master in International Hotel and Tourism Management

Studies may be undertaken in the following specialisations.

• Event Management
• Hotel Management
• Sport and Recreation Management
• Travel and Tourism Management

PhD

➢ ASIA

Institution: Hong Kong Politechnic University
Department: School of Hotel and Tourism Management

Undergraduate

• Hotel Management
• Tourism Management
• Convention and Event Management

Postgraduate

• Hotel and Tourism Management

PhD
➢ AMERICA

Institute:       George Washington University
Department:     School of Tourism and Hospitality Management

Postgraduate
Master of Tourism Administration with a possible specialization in:

- Tourism Destination Management
- Event & Meeting Management
- Sport Management
- Hospitality Management

PhD

➢ AFRICA

Institution:    University of Johannesburg
Department:    School of Tourism and Hospitality

Undergraduate
Hospitality Management
Tourism Management
BEST PRACTICE EXAMPLE 7

BEST PRACTICE FOR PROFESSIONAL TRAINING

Example University of Surrey, UK

Benefits from Best Practice Example:

The example will demonstrate how professional training can be run in a systemised and highly controlled and monitored way to maximise student learning and development and strengthen student employability.

Best Practice Example: Professional Training Placements

Information for prospective students

Q: What will I get out of a management placement year?

Q: What have previous management students said about their placement experiences?

Q: How long are management placements?

A:

Placements must be at least 46 working weeks, commencing any time between July and September following the conclusion of your second year of academic study, and finishing the following summer.

Q: Who organises the placement?

A:

You have the freedom to apply for the placements that interest you – the School of Management does not assign students to organisations.

Every year we are notified by a wide range of employers of hundreds of placement opportunities. They are advertised on an online list and you can apply to as many as you like. You can also arrange your own placement with an employer not featured on our list, but any such placement can only go ahead with prior approval from the School.

Detailed support and guidance on the process of finding and securing a placement is provided via the Professional Training Orientation programme during the second year.

Q: What type of placements can I do as part of a management course?

A:

Placements undertaken by management students are wide ranging, reflecting the breadth of management programmes on offer. Previous roles on offer will range from Marketing Executive at an international financial organisation, to Food & Beverage Trainee Manager at a 5* hotel.

We do not place limits on the size or nature of the organisation you choose to work for, provided the role itself provides the opportunity to gain relevant management experience. Nor do we limit the employers you can work for based on your chosen degree programme. This provides you with the opportunity to try things out to see what specific job roles and sectors are really like.

Q: Do I get paid?

A:

We strongly support the principle of paid placements, and would only approve an unpaid placement in very specific circumstances.
Virtually all of the placements we advertise offer a salary, and these currently range from £12,000 to £18,000.

Q: Can I do a placement abroad?
A:

Yes. A year abroad is an excellent way to aid your personal development and gain new experiences. Approximately 10 per cent of students taking a placement year will do so overseas, in such locations as The USA, New Zealand, Dubai, Germany, Ireland and Portugal. You can go anywhere, provided the role is suitable, the destination is deemed safe and a tutor is able to visit you.

Q: Is a placement a compulsory part of management courses?
A:

No. All management courses can be taken as a 3- or 4-year programme. The final decision on which route to take is made toward the end of the second year.

Q: Does the placement contribute to the degree mark?
A:

Yes. The School of Management placement year is assessed through a written business report plus performance reports from your employer and academic tutor. The final mark counts for 10 per cent of your final degree classification.

Q: How will the Department/School support me whilst I’m on placement?
A:

You will be assigned an academic tutor for the year, who will be contactable throughout the year to provide guidance and support. You will also have 3 meetings with your tutor during the year, at least 2 of which should be at your place of work.

Q: What have employers said about management students?
A:
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