

April

'26

Talent Study Twente

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Twente
Board

vh
Van Haelst & Co

Twente

Inhoud

1. Inleiding
2. Doel en opzet studie
3. Vraag naar Talent in Twente
Profielen & vaardigheden
4. Beschikbaarheid
5. Drijfveren in career mobility
6. Percepties van Twente
Imago
Reputatie
7. Conclusies
8. Aanbevolen acties

Twente

Inleiding

1

Twente

Twente Board Visie

**Twente als technologisch toonaangevende,
groene regio in 2050.**

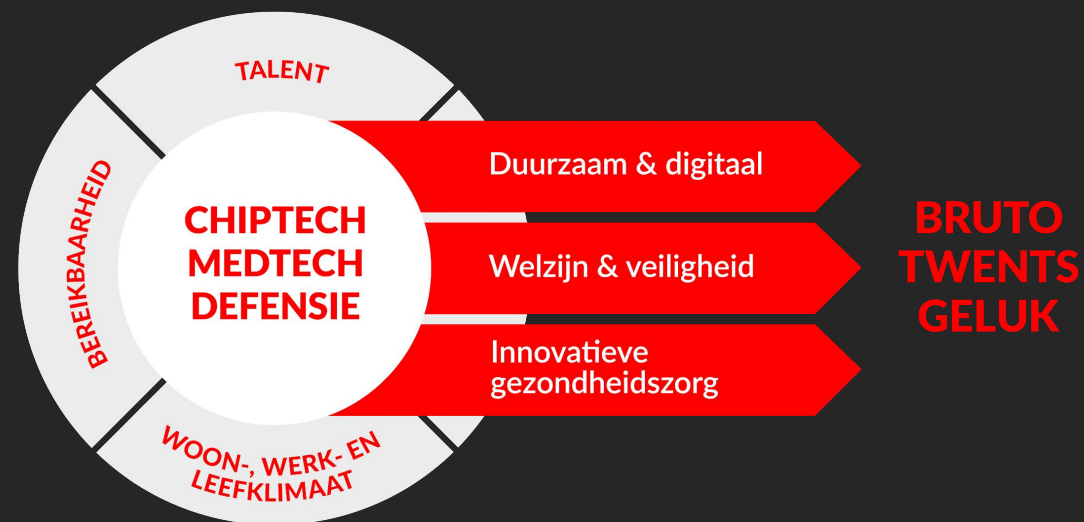
Twente als onmisbare, sterke schakel in de waardeketens van de halfgeleider industrie, Life Sciences & Health (LSH) en defensie industrie.

Sleuteltechnologieën:

1. Geïntegreerde fotonica, (heteroog) chip design, High Tech Equipment
2. Imaging & sensing, robotica, telecare
3. Counter drones, Radar & sensing for Integrated Air Missile Defense (IAMD)
4. Advanced Manufacturing
5. AI, data & slimme systemen
6. Batterijtechnologie

Hightech - applied, dual use - gericht op maatschappelijke transitie, cruciaal voor toekomstige verdienvermogen van de regio en NL.

Missie



Ambities & Uitdagingen

Tot 2050:

- 55.000 extra banen
- Waarvan 15.000 banen in de stuwende economie
- 100.000 extra inwoners
- 60.000 extra woningen

Naast ambitie hebben we ook **uitdagingen**:

- Dubbele vergrijzing én ontgroening
- Tekorten arbeidsmarkt: o.a. techniek, zorg

PREMIUM

Er is groot gebrek aan elektriciens en loodgieters. © Getty Images

Twente doet het economisch goed, maar als er meer personeel was dan zou het nóg beter gaan

Gerben Kuitert
Algemeen verslaggever
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Artikel luisteren

Tot en met 2027 komen er in Twente naar verwachting 9400 banen bij (+2,9 procent). In de Achterhoek is slechts een minieme groei zichtbaar: +1000 banen

Talent Programma

I. Werken aan

Regie functie TBD (door-)ontwikkelen

- Programma mgt
- Positionering & profilering vh programma
- Kennisontwikkeling - expertsessies
- Talent Intelligence
 - Vraag naar talent
 - Talent Perceptie studie
 - KPI's management

II. Werken in

Speerpunten

1. Twente, van blindspot naar hotspot (profilering)
2. Aantrekken van (internationaal) talent en kenniswerkers
3. Groei van het aantal technologie-studenten
4. Blijvend ontwikkelen van de huidige workforce (kennis en vakmanschap, een leven lang leren)

Talent opgave

Twente als carrière bestemming

- Van blindspot naar hotspot

Activiteiten nog meer **richten** op de 'most wanted' in technologie | semicon, LSH, defensie

De opgave vereist een **integrale aanpak & funding**

- zij-instroom (ca. 15%)
- initiële opleiding (ca. 25%)
- arbeidsproductiviteit, aantrekken en behouden van talent, uit binnen- en buitenland (>50%)

Aanpak aanscherpen

- data-gedreven
- vraag-gestuurd
- (toegang tot) aantrekkelijke leef- en werkomgeving
- eenduidig eigenaarschap | ondernemers

Doel en opzet studie

2

Twente

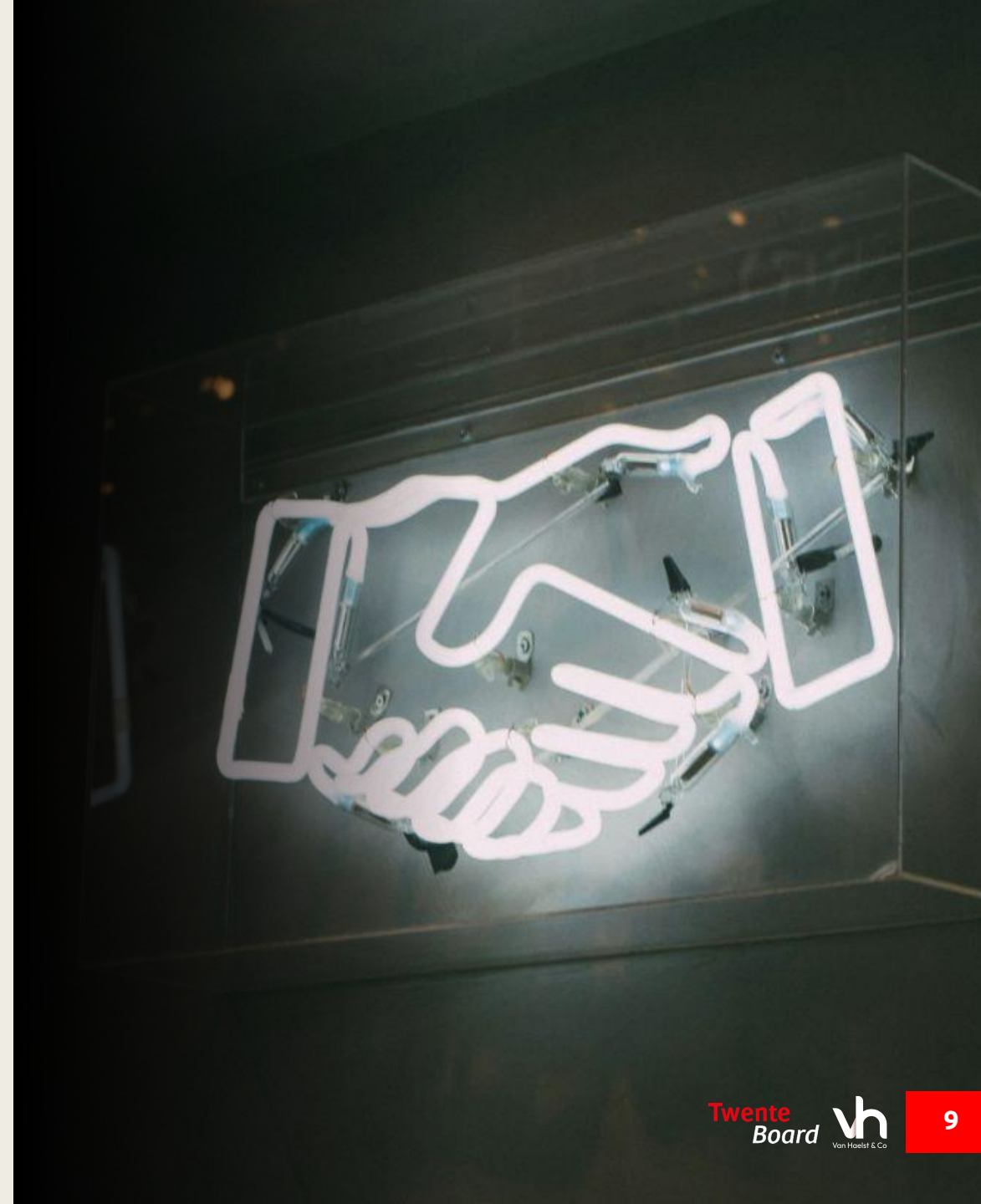
Doel

De snelle ontwikkelingen in de sterke clusters van Twente gaan gepaard met **talent risico's bij de werkgevers** en een behoefte aan strategische samenwerking, toegang tot talent en talentontwikkeling.

Deze studie faciliteert **vraagsturing en besluitvorming o.b.v. feiten & cijfers** m.b.t. de vraag van de Twentse werkgevers en het talent

Doel: aansluiting stimuleren

- van het aanbod van talent op de (toekomstige) vraag bij de werkgevers
- van het aanbod van publieke en private voorzieningen op de drijfveren van talent.



3 vragen

1. Wat zijn de meest gewilde profielen & skills?

*Wie zijn er nodig?
Vraag naar Talent analyse*

Werkgever needs

- **Profielen en skills**, nu & toekomst
- Meest gewild, snelst groeiend
- **Cross** sector / technologie
- Invloed transitie

2. Waar te vinden?

Hoe schaars in regio/land, waar elders te vinden?

Target needs

- **Schaarste** niveau
- Geografische **beschikbaarheid**

3. Hoe aantrekken & behouden?

*Wat bepaalt hun carrière keuzes?
Wat vinden ze van de regio?*

Talent needs

- **(International) career mobility drivers**
- **Percepties**
- Imago & reputatie

Opzet

1. Wat zijn de meest gewilde profielen & skills

Werkgever needs

Vacature analyse

- Selectie en curatie werkgevers in de stuwende economie van Twente
- Vacatures feb 2024 - jan 2026
- Jobboards, Bullhorn



2. Waar te vinden?

Target needs

Beschikbaarheid analyse

- Recruitment feasibility
- Europa - Giant
- Buiten Europa - studies & benchmarks



3. Hoe aantrekken & behouden?

Talent needs

Motivatie + merk onderzoek

- Online vragenlijst
- Distributie via regionale netwerk en CINT panels
- Deskresearch (UT onderzoek, FPL, NL International Talent Perception Study)

Future Place
Leadership™



Welke werkgevers & vacatures?

Werkgevers

“Bedrijven en organisaties in Twente”

- Actief in sleuteltechnologieën (ST) in strategische clusters: halfgeleider, medisch & defensie industrie:
 - Chiptech incl fotonica, (heterogeen) chip design, High Tech Equipment
 - Medtech: Imaging & sensing, robotica, telecare
 - Counter drones, Radar & sensing for Integrated Air Missile Defense (IAMD)
 - Advanced Manufacturing
 - AI, data & slimme systemen
 - Batterijtechnologie
- R&D, design, manufacturing
- OEM + Tier 1, 2, 3
- Groot en MKB, scale-ups en start-ups



Vacatures

- R&D, engineering, design, manufacturing,
- Ops & business support
- Junior, medior and senior
- Academically and vocationally trained

Selectieproces

1. Input klant + deskresearch - longlist
2. Trefwoordanalyse per ST- relevante vacatures
3. AI en online verificatie - actieve betrokkenheid ST
4. Definitieve lijst van bedrijven
5. Grote werkgevers: alleen relevante vacatures
6. Geen vacatures intermediairs

Welke landen / nationaliteiten?

Landen

Landen met beschikbaarheid 'most wanted'

- Vergelijkbare technologische clusters
- Aanwezige nationaliteiten in Twente

Selectieproces



- In Europa i.s.m. IG
- Buiten Europa
 - eerdere studies & ervaring
- Input Twente netwerk
- 11 landen in Zuid-EU, Oost-EU, Turkije, Americas (USA, Canada), Asia (Japan, South-Korea)
- Voor activatie meenemen inzichten:
 - NL - STEM study
 - Beethoven en onderwijs in Twente



Wat motiveert? Wat vinden ze?

Motivatietoerzoek

- Drijfveren t.a.v. de leef- en werkomgeving, baan/carriere
- Wat staat er bovenaan de lijstjes?
- 'De meetlat' | gewogen perceptie

Perceptie onderzoek

Hoe wordt het merk door de doelgroep gezien en beleefd in termen van betrouwbaarheid, kwaliteit en innovatie?

Reputatie onderzoek is meer gericht op de persoonlijke indrukken en meningen van individuen of specifieke doelgroepen. Hoe ervaren zij zelf de regio?

Imago-onderzoek meet het beoogde, gewenste beeld, terwijl perceptie-onderzoek focust op spontane, persoonlijke indrukken.



Proces

- Input verzamelen via een online enquête
- Respondenten verzamelen via
 - Cint: een wereldwijd DIY-onderzoekspanel met meer dan 306 miljoen respondenten in meer dan 130 landen
 - TBD en partners in netwerk Twente.
- Doelstelling: 200 respondenten per land, waarbij alle belangrijke demografische groepen worden vertegenwoordigd.
- De uitkomsten zijn gevalideerd met ondernemers en (internationaal) talent.

A young man wearing a VR headset is shown in a factory setting. He is wearing a blue t-shirt and is looking towards the camera. A yellow robotic arm is visible in the foreground, reaching towards him. The background is dark with some papers and a blue light source.

Vraag naar Talent in Twente

3

Twente

14.181 vacatures

6 sleuteltechnologieën

Meeste vacatures

- AI & Intelligent Systems (37%)
- Chiptech (35%)
- Robotics & Smart Manufacturing (23%)

3 clusters

Medtech

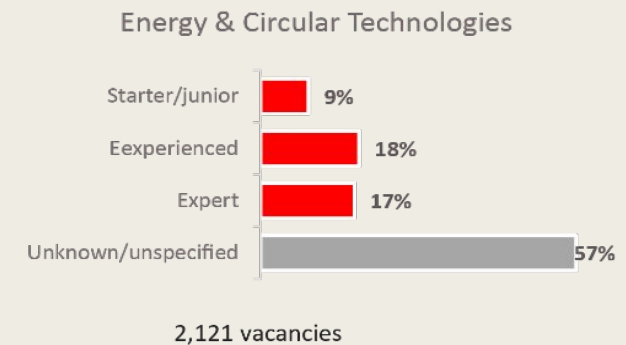
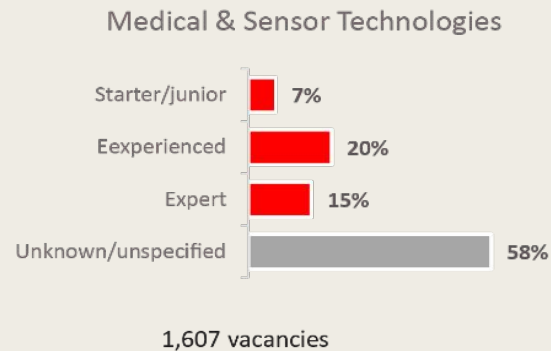
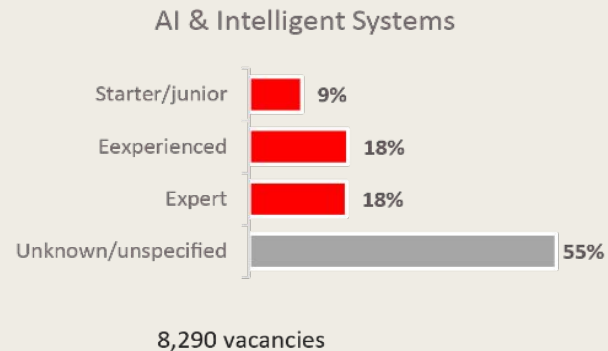
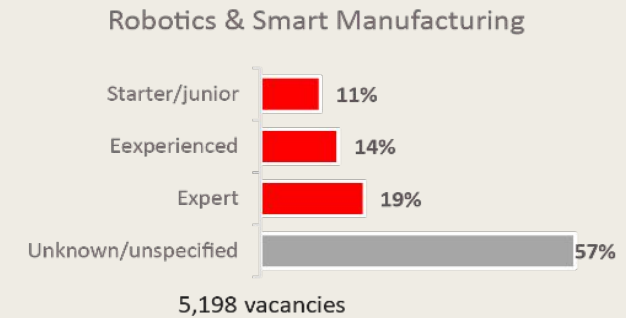
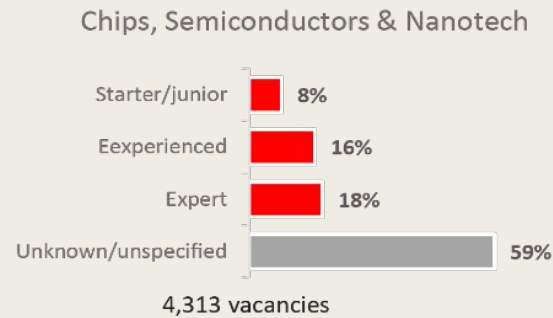
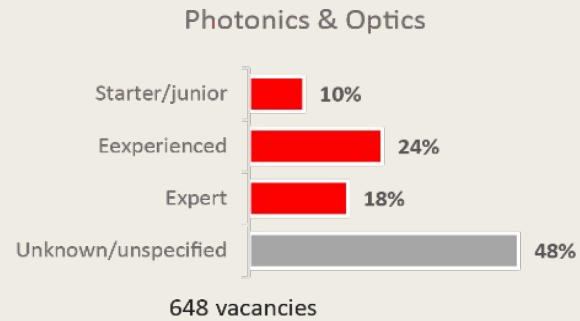
Chiptech

Defensie

Vraag | ervaring

Meeste vacatures in stuwende economie gericht op mid career en senior professionals (samen 33 - 42 %)

Unspecified 48 - 59 % !



Unknown/unspecified: Because of the high levels of scarcity, some employers omit information about the level of experience required from the advertisement because it is not relevant or to avoid limiting the candidate pool.

Vraag | opleiding

Meeste vacatures

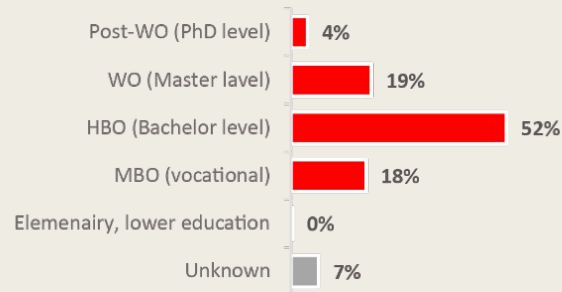
HBO 44 -52 %

MBO (vocational) 17-36 %

WO 7-22%

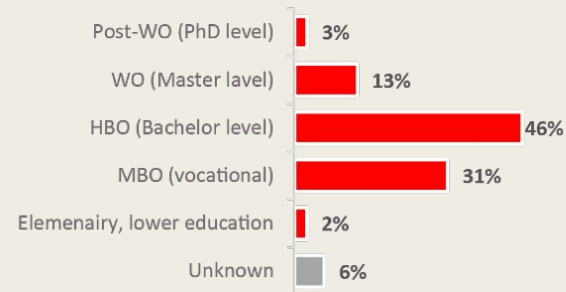
PhD 1-6 %

Photonics & Optics



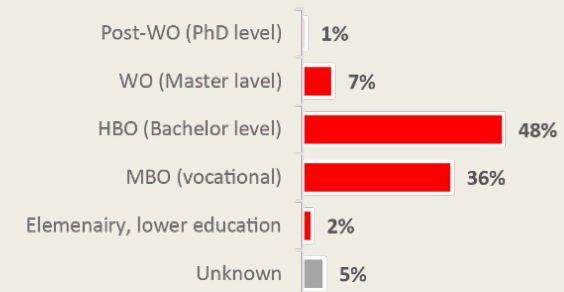
648 vacancies

Chips, Semiconductors & Nanotech



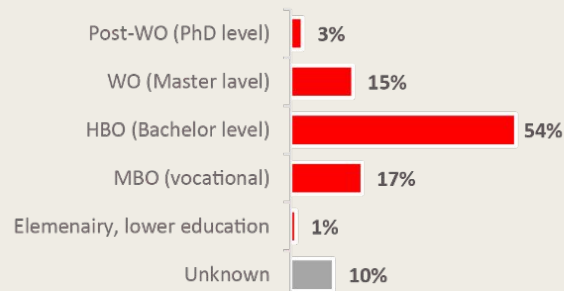
4,313 vacancies

Robotics & Smart Manufacturing



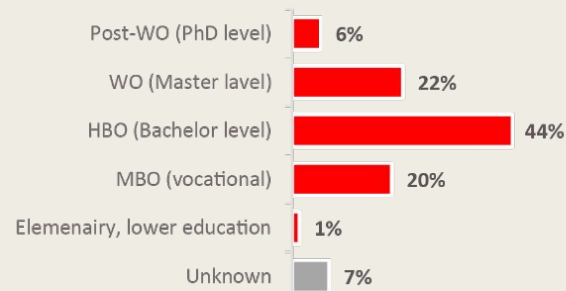
5,198 vacancies

AI & Intelligent Systems



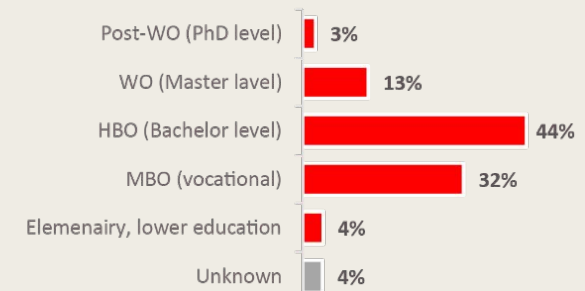
8,290 vacancies

Medical & Sensor Technologies



1,607 vacancies

Energy & Circular Technologies



2,121 vacancies

Note: Some vacancies do not specify a single educational level, but rather a combination (e.g. hHBO/WO). Such vacancies are classified at the lower of the two levels (in this case, HBO).

Source: Bullhorn Market IQ, analysis by Intelligence Group.

Vraag | werkgevers

44% van alle vacatures bij 'slechts'
22% werkgevers > 200 fte.

Belang MKB: 40% vacatures bij MKB

Top employers in terms of number of vacancies

Employer	# vacancies
University of Twente	1,539
Thales Nederland	1,344
Nedap	621
Voortman Steel Group	379
Saxion	323
Demcon	255
Benchmark Electronics	245
Eaton	217
VDL Groep	197
HoST Group	196

Large companies/employers dominate the list. Especially when they are active in several key technologies. Of course, also smaller companies (in terms of vacancies at least) focusing on one of the key technologies are included in the analysis. Examples are **Trumpf, PHIX, Lionix, NTS, Urenco, Romia Robotics, Micronit, Medspray, Laborie Medical Technologies, Enrichment Technology Company en Nx Filtration.**

Source: Bullhorn Market IQ, analysis by Intelligence Group.

Size class

The graphs show a breakdown by size class for the number of vacancies and number of organizations. The categories differ slightly from regular classifications, but these are the categories that are distinguished by the data provider (Bullhorn Market IQ).



World class Tech Twente

Internationaal actief

- Ja 202
- Beperkt 140
- Nee 45

Kernclusters

- Medtech 128
- Semicon 124
- Defence 87

Fase bedrijven

- Start-ups 25
- Scale-ups 42
- Gevestigd 288
- Overig 22

Totaal 377 bedrijven

- Small 168
- Medium 66
- Mid Market 49
- Enterprise 94

Ketenpositie

- OEM - 1 of 61 ?
- Tier 1 - 87
- Tier 2 - 78
- Tier 3 - 147

Vraag | profielen

Profielen - most in-demand

Enorme overlap in meest gevraagd profielen cross 6 sleuteltechnologieën

Most in-demand occupations by key technology

x Occurs in top list of multiple key technologies

Photonics & Optics	Chips, Semiconductors & Nanotech	Robotics & Smart Manufacturing	AI & Intelligent Systems	Medical & Sensor Technologies	Energy & Circular Technologies
PhD positie	PhD positie	Mechanical engineer	PhD positie	PhD positie	PhD positie
Wetenschappelijk onderzoeker	Software engineer	Software engineer	Software engineer	Wetenschappelijk onderzoeker	Mechanical engineer
Programmeur C, C++	Ingenieur elektrotechniek	Ingenieur elektrotechniek	Wetenschappelijk onderzoeker	Verpakkingsoperator	Servicemonteur installatietechniek
Systems engineer	Wetenschappelijk onderzoeker	Elektromonteur	Medewerker klantenservice	Financial controller	Inkoper
Software engineer	Projectleider	Servicemonteur	Java ontwikkelaar	Systems engineer	Projectleider
Business development manager	Mechanical engineer	Projectleider	Projectleider	Kwaliteitsingenieur	Engineer (overig)
Ict test engineer	Ict test engineer	Hardware engineer	Ict test engineer	Business development manager	Business development manager
Engineer (overig)	Productiemedewerker	Servicemonteur buitendienst	Systems engineer	Assemblagemedewerker	Servicemonteur
Projectleider	Inkoper	Technisch werkvoorbereider	Financial controller	Mechanical engineer	Ingenieur elektrotechniek
Tester software	Systems engineer	Inkoper	Full stack developer	Procesingenieur	Wetenschappelijk onderzoeker

Vraag | vaardigheden

IT skills – most in-demand

Vaardigheden - veel overlap

- IT, professional en social skills
- meest gewild, typisch, vgl Eindhoven

Photonics & Optics	Chips, Semiconductors & Nanotech	Robotics & Smart Manufacturing	AI & Intelligent Systems	Medical & Sensor Technologies	Energy & Circular Technologies
Systems Engineering	Software Engineering	Software Engineering	Software Engineering	Python	SAP Applicaties
C++	C++	Backend	Scrum	C++	Python
Software Engineering	Linux	Python	Python	Software Engineering	Kunstmatige Intelligentie
Python	Systems Engineering	Kunstmatige Intelligentie	Kunstmatige Intelligentie	Systems Engineering	Data-Analyse
Agile Methodologie	Python	Data-Analyse	Agile Methodologie	Data-Analyse	C++
Linux	Agile Methodologie	Front End	Java	Programmeren (Computer)	Software Engineering
C#	Data-Analyse	Solidworks	Data-Analyse	Kunstmatige Intelligentie	Solidworks
Continuous Integration	Scrum	3D-Modellering	Backend	MATLAB	Power BI
Scrum	Informatiebeveiliging	Java	Continuous Integration	C#	Machine Learning
Java	3D-Modellering	C++	Linux	SAP Applicaties	Systems Engineering
Software Architectuur	Epic Stork	C#	C++	Solidworks	Programmeren (Computer)
Solidworks	Java	Eplan	Systems Engineering	Embedded Software	Dataverwerking
Kunstmatige Intelligentie	Programmeren (Computer)	Scrum	Front End	Machine Learning	SCADA
Git	Kunstmatige Intelligentie	Continuous Integration	Devops	Afas	3D-Modellering
Systeemarchitectuur	SAP Applicaties	SAP Applicaties	Informatiebeveiliging	Systeemarchitectuur	C#

x Occurs in top list of multiple key technologies

x Occurs in top list of all key technologies

Nieuwe en opkomende skills & tech

Nog **sterk domeinspecifiek** binnen de zes sleuteltechnologieën.

De grootste overlap in:

1. **AI- en integratiegedreven concepten**
 - a. Bijv. Digital Twin, Edge AI, AI Governance / AI Safety.
 - b. een verbindende “systeemlaag” boven sectorale technologieën.
2. **Enabling technologieën**
 - a. Bijv. Sensor fusion, Secure / confidential AI, Energy-efficient / green AI, Cybersecurity (OT / device security)

Nog nauwelijks in vacatures (< 2%), wat wijst op een vroege R&D- of pilotfase.
‘Mkt & Innovation move faster than HR’.

Strategische conclusie

Cross-sector innovatiekracht in Twente: bestaande en next tech
AI-gedreven systeemintegratie, digital twins, security en energie-efficiëntie
Twente’s profiel: applied deeptech- en systems-integration regio

Top “most wanted”

Twente

- Software engineer (526)
- Mechanical engineer (332)
- Ingenieur elektrotechniek (302)
- Systems engineer (211)
- Ict test engineer (203)
- Financial Controller (196)
- Business developm. manager (186)
- Inkoper (184)
- Servicemonteur (177)

*NOTE: dezelfde conclusies gelden cross sectoraal
Medtech/Semcon/Defence - see appendix*

‘Cross-check’

Meest cruciaal - 6 ST & 3 strategische clusters

1. Embedded software developer/engineer
2. Systems engineer/architects
3. Design engineer
4. Mechatronics/Robotica engineer
5. Photonic designer chips & optical
6. Sensor Technology specialist
7. Electrical engineer
8. AI & Robotics integration engineer
9. Data Scientist & AI specialist
10. Process engineer
11. Field service & (smart) Maintenance & Reliability engineer
12. Quality & Regulatory specialist
13. Cybersecurity specialist
14. Energy specialist

Sectoral and cross sectoral studies and interviews with employers validate the huge overlap in demand for talent cross key technologies and cross strategic clusters and beyond

NL-survey Semicon “Beethoven” study, 2025

mbo

CNC Milling Operator
Field Service Engineer
Mechanical Design Engineer
Metal Machining Specialist
Precision Machining Technician
Production Operator

hbo

Manufacturing Engineer
Mechanical Design Engineer
Project Manager
Project Procurement Specialist
Systems Engineer / General Engineer

wo

Mechanical Engineer
Program Manager
Project Manager - Systems Analysis & Programming
Software Engineer
Strategy & Policy Manager
Systems Architect
Systems Engineer / General Engineer

Vraag naar talent Next Tech Twente

Basis (febr 2024 - jan 2026): $14.000/2 = 7.000$ per jaar

Semicon | Chiptech

- 4.500 eigen groei en vervanging
- 4.500 extra door groei ASML (Beethoven)

In Twente in 5 jaar = 2.000 per jaar

Waarvan:

- 40% MBO - operating
- 30% HBO - systemintegration + digitization
- 30% WO - R&D

LSH | Medtech en Defensie | Tech

- groei: 1.000 per jaar



9 - 10.000
vacatures
per jaar

Beschikbaarheid

4

Twente

Recruitment feasibility

Engineers fairly to extremely difficult to recruit. Zo'n 15.000 extra high tech specialisten nodig samenwerven en -werken

Occupation	Recruitment feasibility Twente region	Recruitment feasibility NL	Expectation coming 6-12 months	Junior/medior /senior
Software engineer (526)	● Fairly difficult to recruit	● Fairly difficult to recruit	↘ but remains fairly difficult	● ● ●
Mechanical engineer (332)	● Fairly difficult to recruit	● Fairly difficult to recruit	→ remains fairly difficult	● ● ●
Ingenieur elektrotechniek (302)	● Difficult to recruit	● Difficult to recruit	↗ but remains difficult	● ● ●
Systems engineer (211)	● Extremely difficult to recruit	● Very difficult to recruit	→ remains extremely difficult	● ● ●
Ict test engineer (203)	● Fairly difficult to recruit	● Difficult to recruit	↘ but remains fairly difficult	● ● ●
Financial Controller (196)	● Very difficult to recruit	● Very difficult to recruit	→ remains very difficult	● ● ●
Business develpm. manager (186)	● Very difficult to recruit	● Very difficult to recruit	↑ becomes extremely difficult	● ● ●
Inkoper (184)	● Very difficult to recruit	● Difficult to recruit	↗ but remains very difficult	● ● ●
Servicemonteur (177)	● Extremely difficult to recruit	● Extremely difficult to recruit	↘ but remains extremely difficult	● ● ●

Not difficult ● ● ● ● ● Extremely difficult

Source: Intelligence Group.

Beschikbaarheid | Europa

Informatie over beschikbaarheid van IT-ers, Mechanics en Finance is ook beschikbaar. Buiten Europa o.b.v. andere bronnen en ervaring.

De informatie bepaalt de doellanden voor werving van specifieke profielen.

Engineering (1/2)

COUNTRY	SIZE OF TARGET GROUP	RECRUITMENT FEASIBILITY	JOB MARKET ACTIVITY	SOURCING PRESSURE	INTERNATIONAL MOBILITY	LABOUR COSTS
Germany	187.200		26%	43%	34%	€ 43,40
Romania	15.500		19%	41%	28%	€ 12,50
Ireland	20.300		23%	46%	37%	€ 42,50
Finland	15.200		9%	25%	34%	€ 37,70
Bulgaria	2.800		16%	27%	21%	€ 10,60
Greece	1.300		12%	13%	27%	€ 16,70
Croatia	2.000		8%	19%	30%	€ 16,50
Austria	4.200		17%	56%	36%	€ 44,50
Lithuania	4.100		10%	33%	30%	€ 16,30
Spain	22.600		13%	53%	32%	€ 25,50
Switzerland	11.600		16%	56%	27%	n/a
Denmark	13.800		16%	52%	43%	€ 50,10
Slovakia	5.700		16%	34%	17%	€ 18,50
Portugal	6.000		13%	49%	34%	€ 18,20



Drijfveren in career mobility

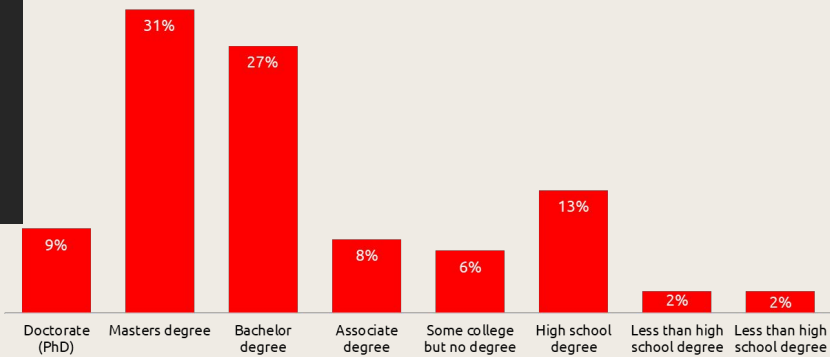
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Twente

3144 Respondents

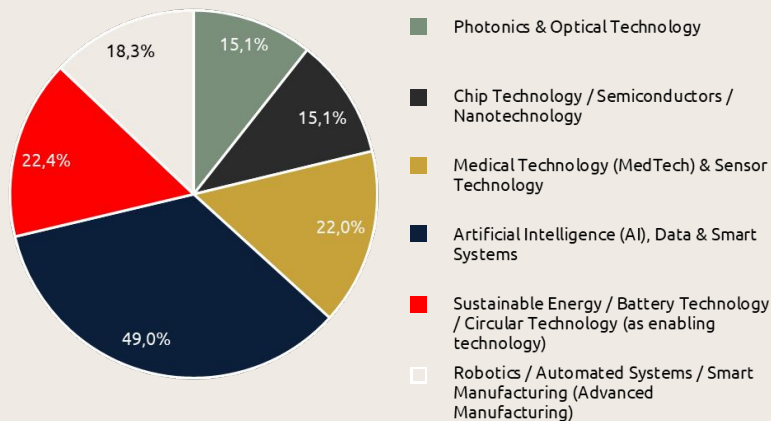
Educational Degree

PhD 180
117 in 6 KT



Experience in 'Twente tech'

Vocational
10 % = 50



Field of work

> 50 % of respondents have educational backgrounds relevant to key technologies in Twente

33 % of respondents work in the areas of IT, Engineering, R&D.



N = 3025, Field of work N = 2565, Twente tech N = 518

12 Nationalities, 3144 respondents

Sweden 224

Canada 92

United States 267

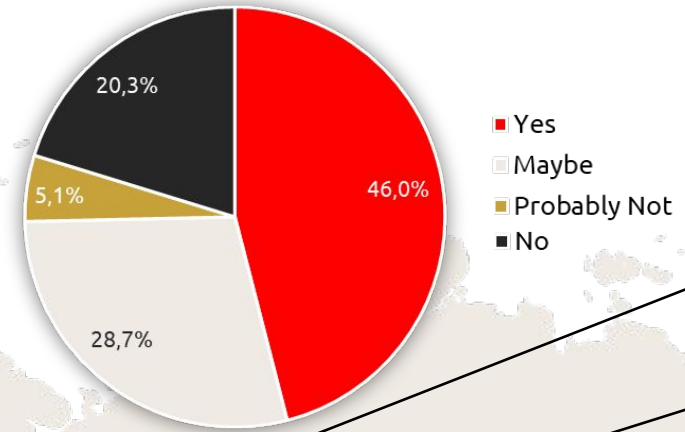
Netherlands 552

Germany 268

Italy 219

75%
Expect to move

N=1766



Poland 245

Romania 240

South Korea 147

Japan 254

Turkey 241

India 209

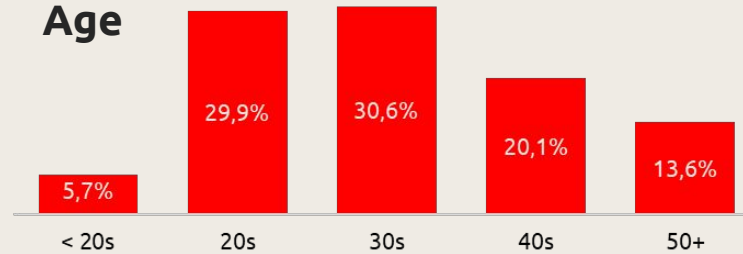


49,5%

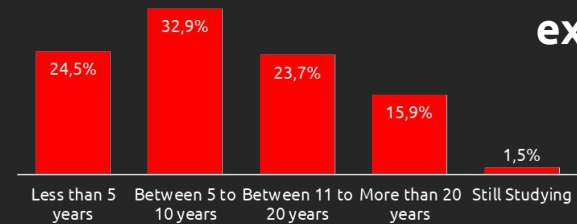


48,5%

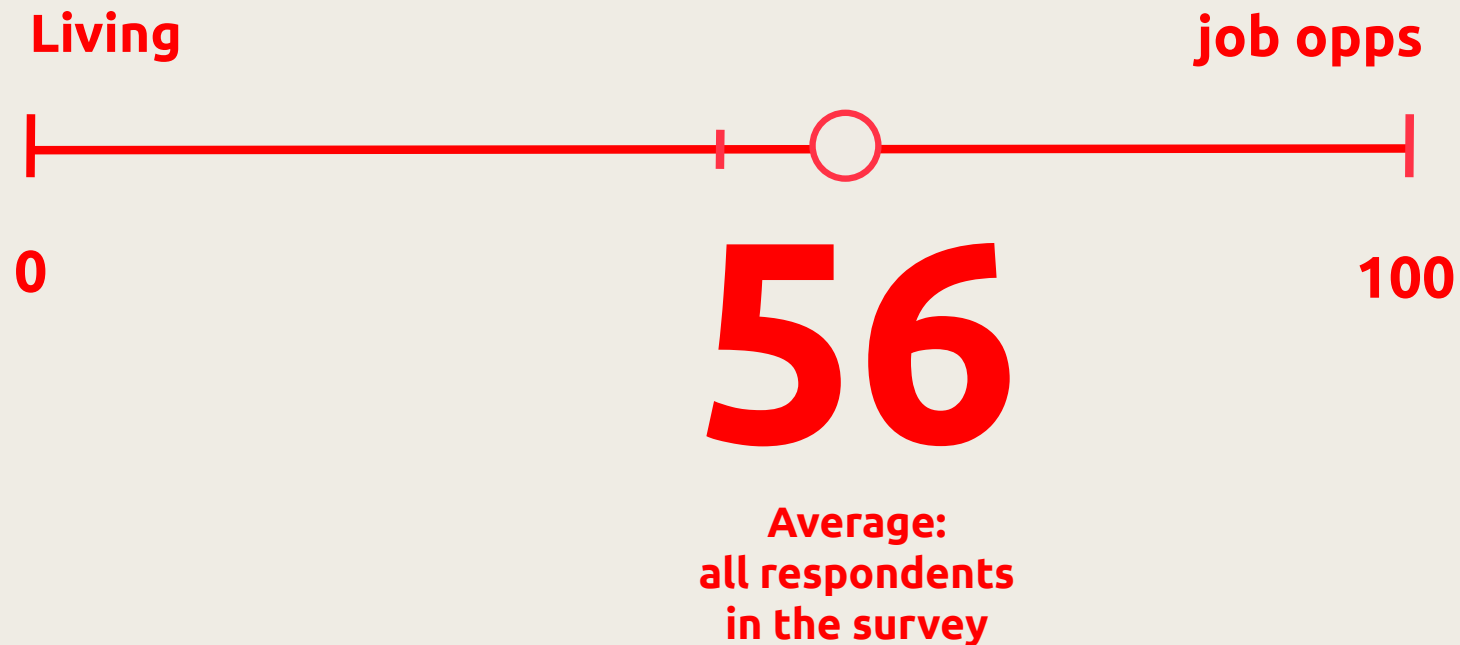
Age



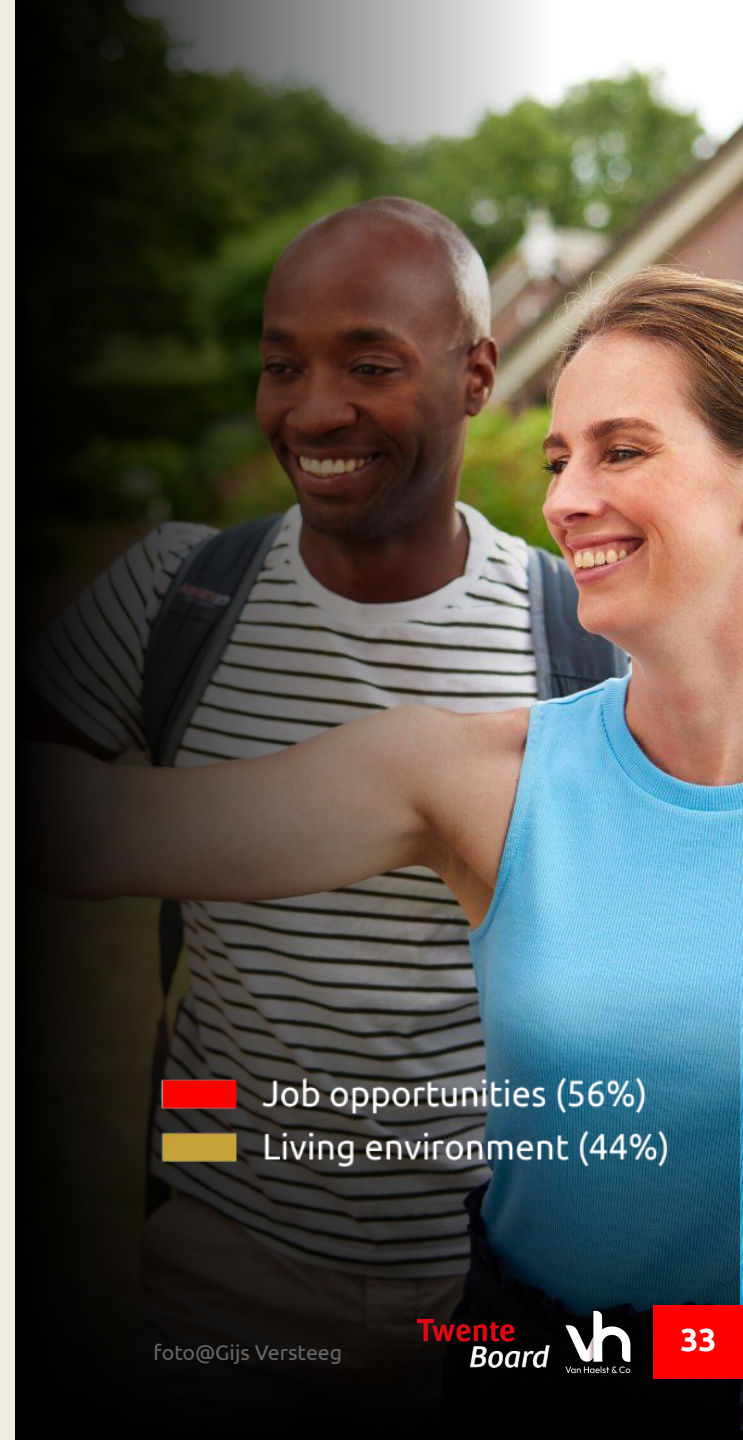
Professional experience



When considering a career move, what is most decisive: the living environment or job opportunities?



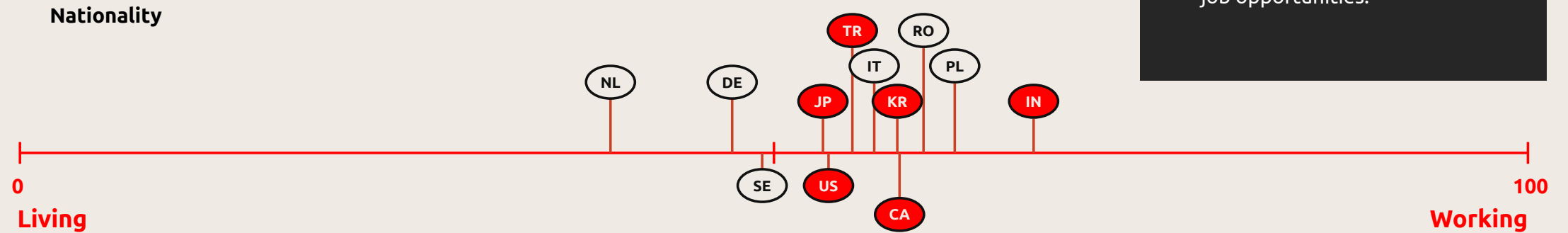
N = 2824



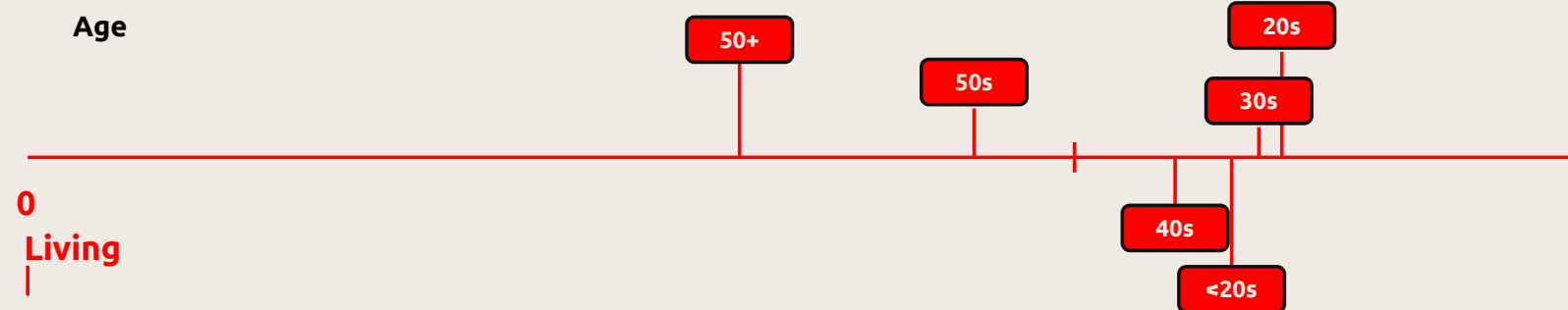
- Job opportunities (56%)
- Living environment (44%)

When considering a career move, what is most decisive: the living or working environment?

Most groups tilt slightly toward job opportunities. Dutch respondents lean most toward living environment; Indian respondents lean most toward job opportunities.



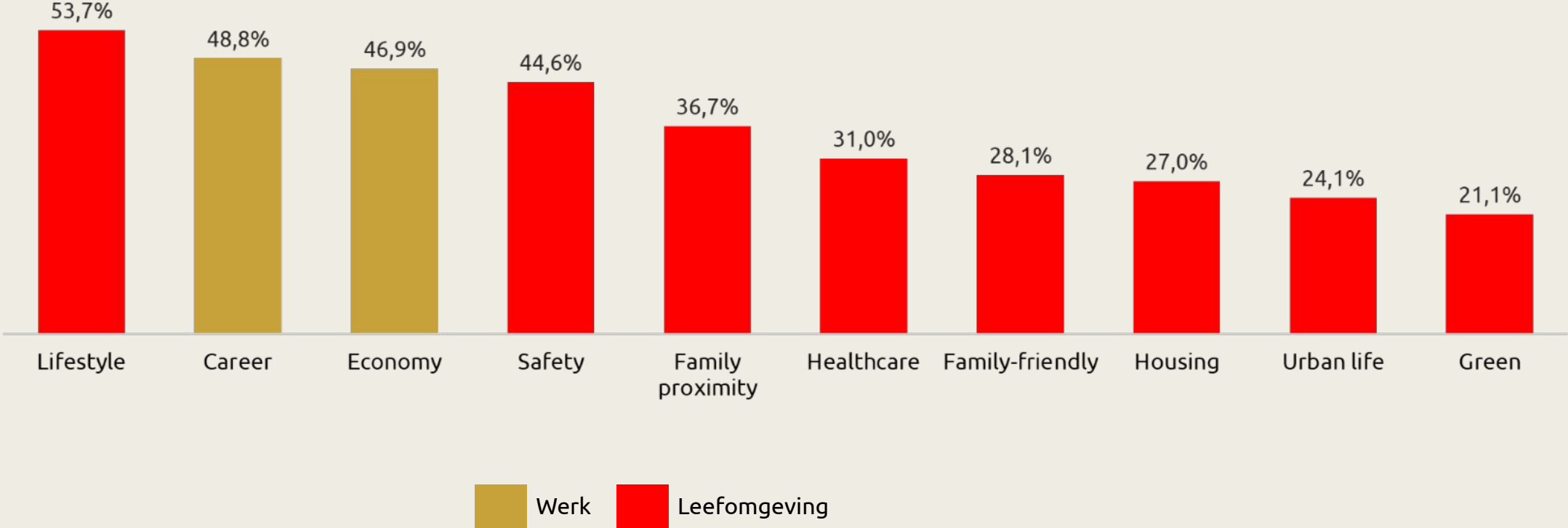
Younger respondents lean more toward job opportunities; the strongest shift toward living environment appears among older age groups.



N = 2362

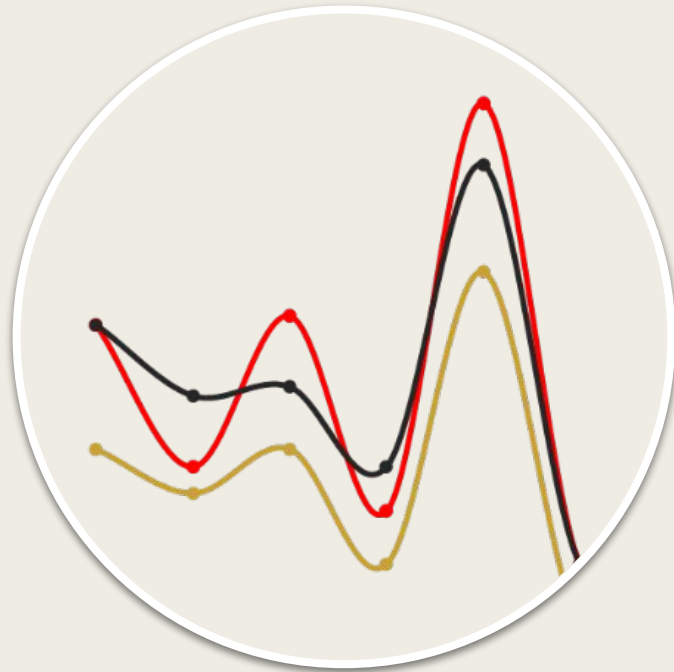
Most important factors when considering relocating abroad.

De meetlat.
Wegingsfactoren



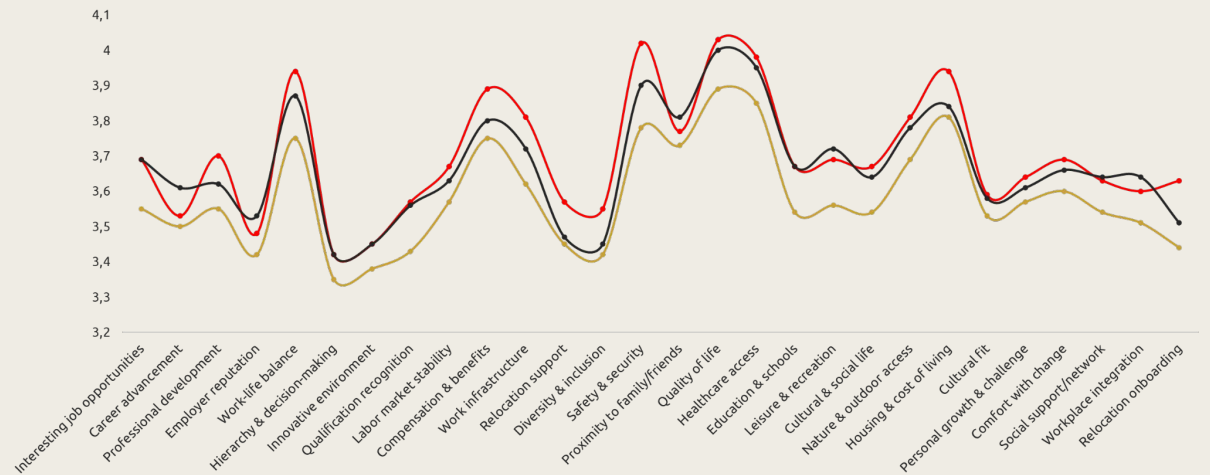
N = 2744

Stay factors vs. leaving factors

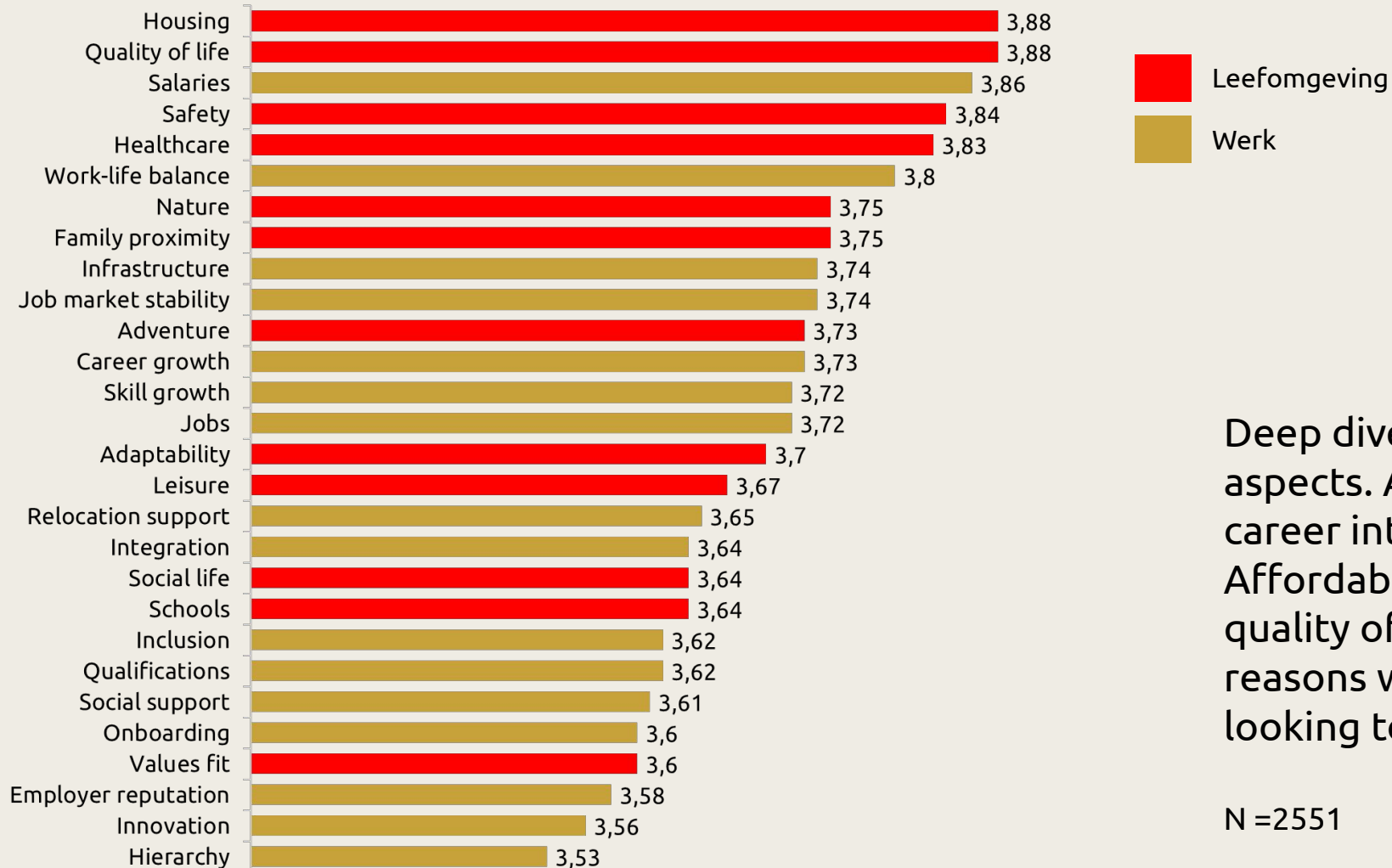


- Importance when considering moving/working abroad
- Importance of factors in decision to stay
- Factors holding you back from moving

The underlying insight is that these aren't abstract ideals — they're the things people have *already built* in their current location. Family ties, an established healthcare provider, a home, a social circle. They score high as "reasons to stay" precisely because people already have them, and they score equally high as "things holding you back from moving" because leaving means giving them up.



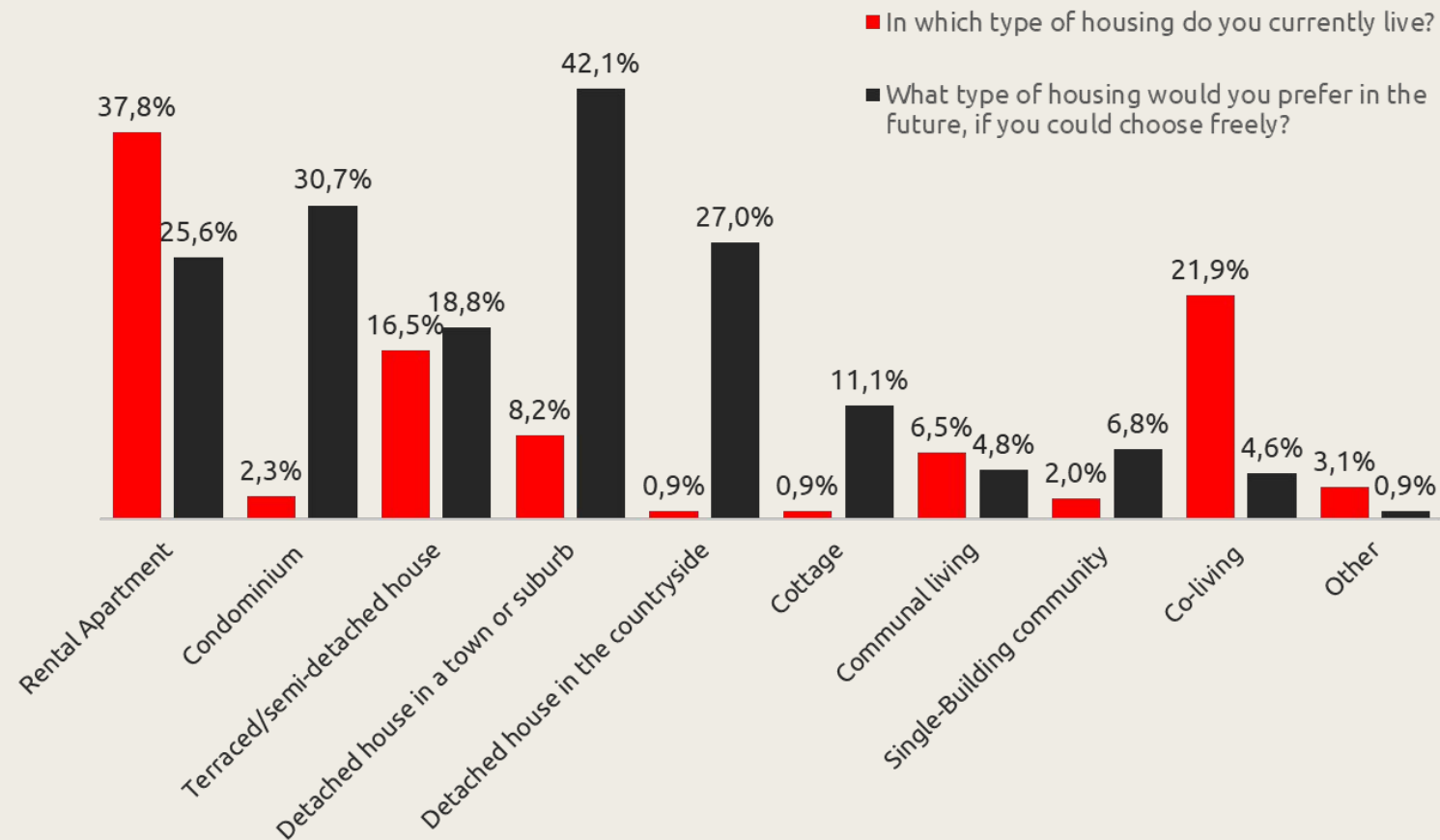
Why are respondents looking to relocate from where they are currently located?



Deep dive in life and career aspects. Aspects of social & career integration. Affordability of housing and quality of life are the top reasons why candidates are looking to relocate.

N = 2551

Current housing status vs. future housing wishes



The data reveals a significant aspiration gap: while 37.8% currently live in rental apartments, only 25.6% would choose this in the future. Conversely, demand for detached houses and condominiums (both suburban and countryside) is far higher than current availability. This has direct implications for housing policy in talent attraction strategies for Twente.

N=3025

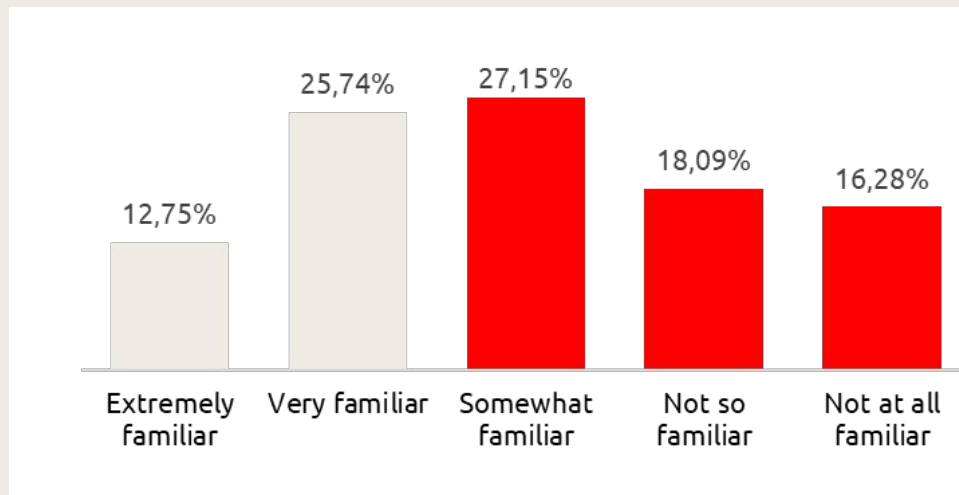
Percepties van Twente

6

Twente

Do internationals actually know Twente?

Question asked: "How familiar are you with Twente?"



>50%
not very familiar...

Twente

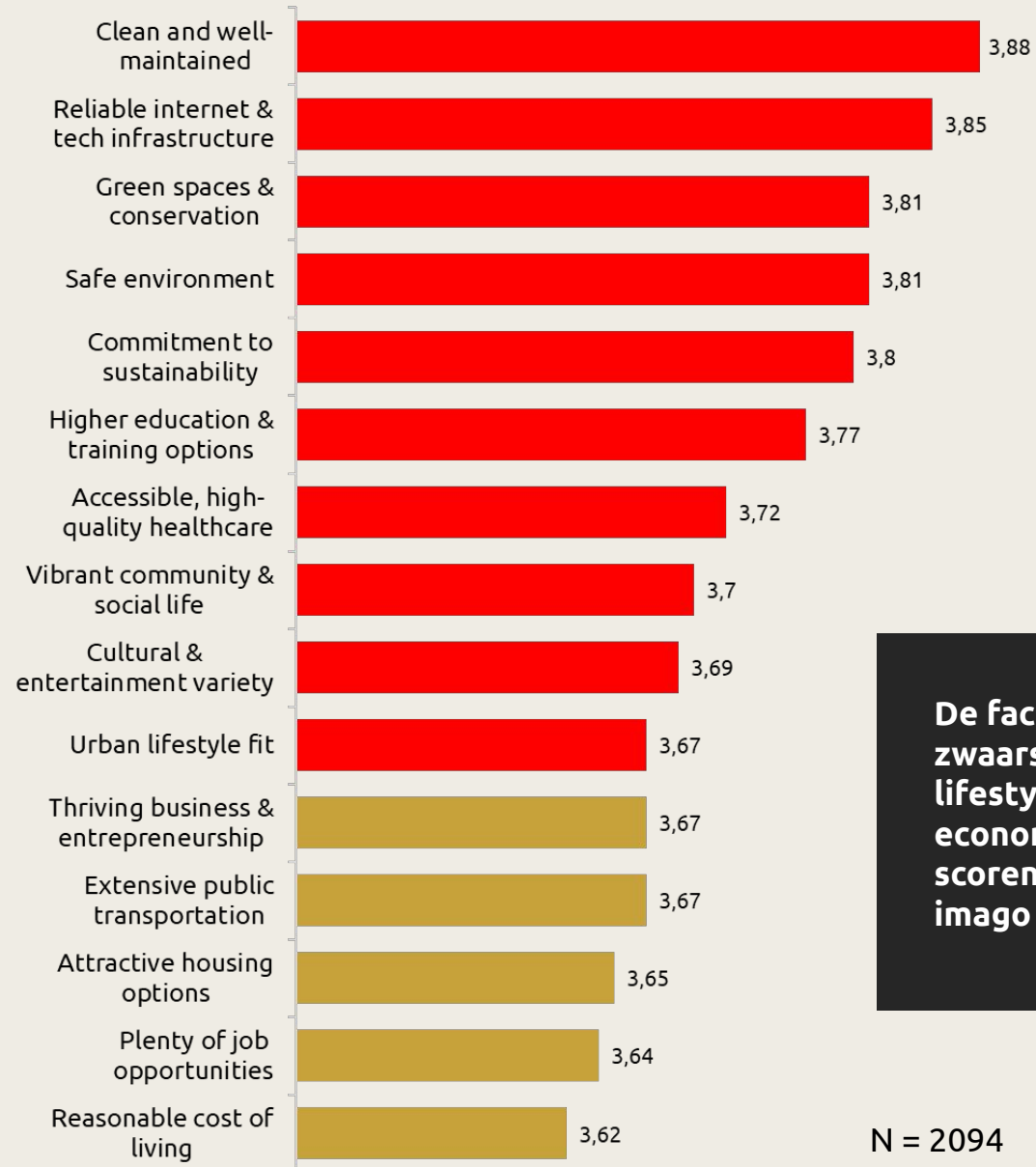
N (total)= 2549
N (excluding 'Not at all familiar')= 2134 - got assessment questions

Imago



foto@Barbara Trienen

Image quality of life & and career in Twente



De factoren die het zwaarst wegen - lifestyle, career opps en economic reasons - scoren niet best in het imago van Twente

N = 2094

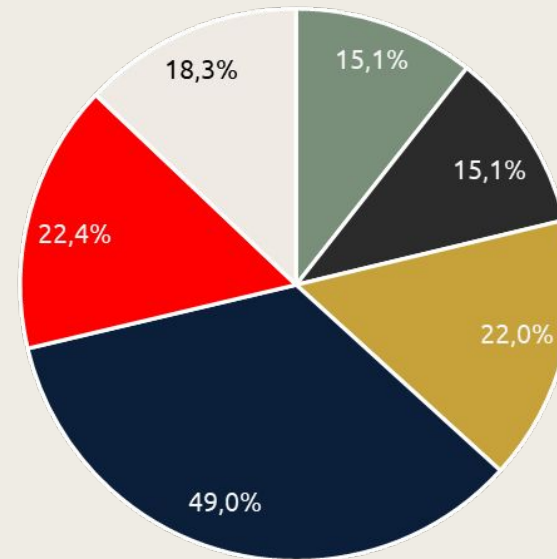
High value cohort

Drivers: Lifestyle (60%), career opps (40%)

Assessment

+ safety, quality of life, healthcare

- job opps, housing, integration challenges



N = 518

- Photonics & Optical Technology
- Chip Technology / Semiconductors / Nanotechnology
- Medical Technology (MedTech) & Sensor Technology
- Artificial Intelligence (AI), Data & Smart Systems
- Sustainable Energy / Battery Technology / Circular Technology (as enabling technology)
- Robotics / Automated Systems / Smart Manufacturing (Advanced Manufacturing)



Image per nationality

Clean & maintained	4.06	4.21	3.75	3.88	4.24	3.96	3.30	3.79	3.98	3.66	3.67	3.71
Internet & tech	4.17	4.09	3.70	3.88	4.19	3.86	3.30	3.63	3.95	3.81	3.69	3.77
Green spaces	3.96	4.21	3.45	3.80	4.33	3.83	3.42	3.66	3.95	3.73	3.65	3.77
Sustainability	3.97	4.15	3.44	3.74	4.30	3.86	3.29	3.84	3.93	3.72	3.63	3.71
Safe environment	4.25	4.21	3.82	3.83	4.38	3.82	3.01	3.63	3.81	3.52	3.54	3.51
Healthcare	4.06	4.04	3.63	3.70	4.14	3.71	3.29	3.66	3.79	3.85	3.72	3.68
Education & training	4.12	4.02	3.54	3.66	4.22	3.84	3.34	3.63	3.79	3.69	3.68	3.74
Community & social life	3.97	4.23	3.45	3.69	4.20	3.81	3.22	3.69	3.66	3.73	3.63	3.72
Culture & entertainment	3.99	4.09	3.43	3.62	4.17	3.75	3.17	3.62	3.71	3.93	3.61	3.70
Urban lifestyle	3.95	4.11	3.51	3.56	4.10	3.76	3.35	3.54	3.69	3.73	3.64	3.68
Business climate	4.03	4.02	3.34	3.67	4.16	3.66	3.18	3.66	3.74	3.63	3.71	3.63
Housing options	4.03	3.91	3.70	3.58	4.14	3.67	3.22	3.58	3.70	3.59	3.62	3.64
Job opportunities	3.94	4.05	3.25	3.65	4.08	3.80	3.37	3.64	3.65	3.68	3.60	3.64
Cost of living	4.05	4.11	3.63	3.58	4.07	3.63	3.42	3.52	3.51	3.58	3.62	3.53
Public transport	4.04	3.93	3.35	3.62	4.13	3.69	3.26	3.57	3.62	3.69	3.55	3.73
	American (United States)	Canadian (Canada)	Dutch (Netherlands)	German (Germany)	Indian (India)	Italian (Italy)	Japanese (Japan)	Polish (Poland)	Romanian (Romania)	South Korean (South Korea)	Swedish (Sweden)	Turkish (Turkey)

The image of Twente is best among respondents from India and Canada.

Whereas the image is low amongst Japanese.

Indians and North Americans believe it's very safe whereas Japanese show doubts.

Dutch and Germans are the most critical on cost of living and job opportunities.

USA, CANADA and INDIA are targets for recruitment.

Reputatie

Dissatisfied

Satisfied

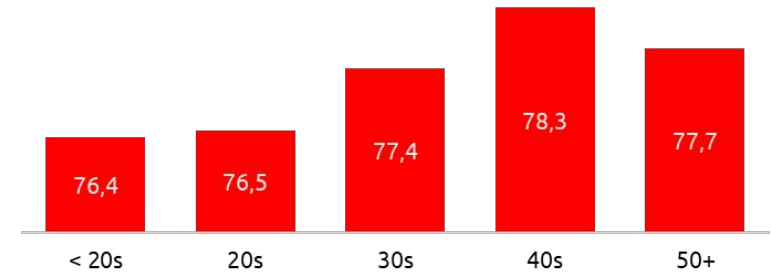


77

Average:
all residents
in the survey

N = 674 currently living in Twente

Age Groups



Nationality



7,36

European
residents

8,05

Non-European
residents

Age group N = 674
Europeans N = 261
Non Europeans N = 239

Assessment: The living environment



Statement	Poor	Fair	Good	Very Good	Excellent	Weighted Average
Bicycle lanes	2,84%	8,68%	27,99%	32,49%	27,99%	3,74
Parks and green spaces	3,13%	10,58%	31,00%	34,72%	20,57%	3,59
Walkability	3,74%	11,38%	30,09%	33,83%	20,96%	3,57
The region's beauty	3,88%	9,85%	32,69%	34,03%	19,55%	3,56
Public spaces	2,83%	13,71%	35,32%	31,30%	16,84%	3,46
Environmental sustainability	3,73%	12,37%	34,87%	32,64%	16,39%	3,46
Sports and recreational facilities	3,88%	11,49%	38,36%	30,60%	15,67%	3,43
Schools	4,39%	11,52%	36,06%	32,58%	15,45%	3,43
Community life	4,19%	13,92%	33,23%	32,49%	16,17%	3,43
Shopping	6,57%	14,33%	32,84%	29,25%	17,01%	3,36
Childcare services	5,28%	11,31%	40,57%	27,60%	15,23%	3,36
Access to healthcare	8,05%	11,77%	33,68%	31,30%	15,20%	3,34
Cafés	4,47%	15,20%	38,00%	28,76%	13,56%	3,32
Restaurants	5,24%	15,42%	36,83%	27,40%	15,12%	3,32
Public transport	6,13%	17,19%	34,08%	27,35%	15,25%	3,28
Housing environment	7,05%	17,09%	31,93%	31,03%	12,89%	3,26
Culture (museums, theatres, cinemas, live music)	7,60%	17,73%	33,08%	28,17%	13,41%	3,22
Nightlife	9,45%	18,29%	34,18%	23,54%	14,54%	3,15

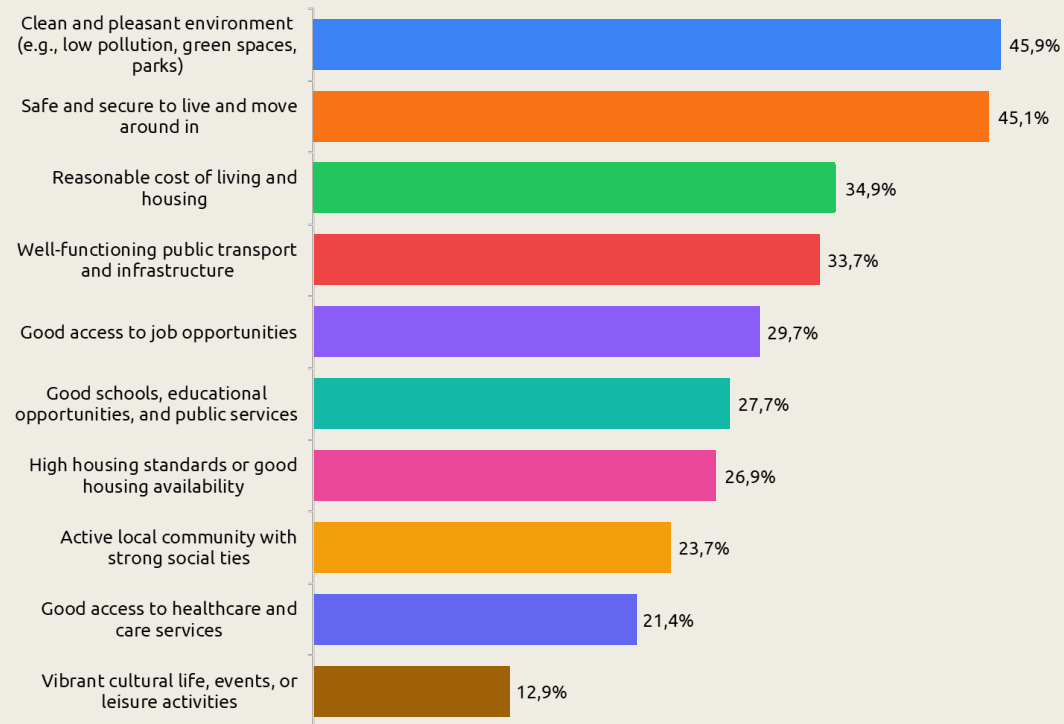
N (currently living in Twente Region) = 674

Least picked Most

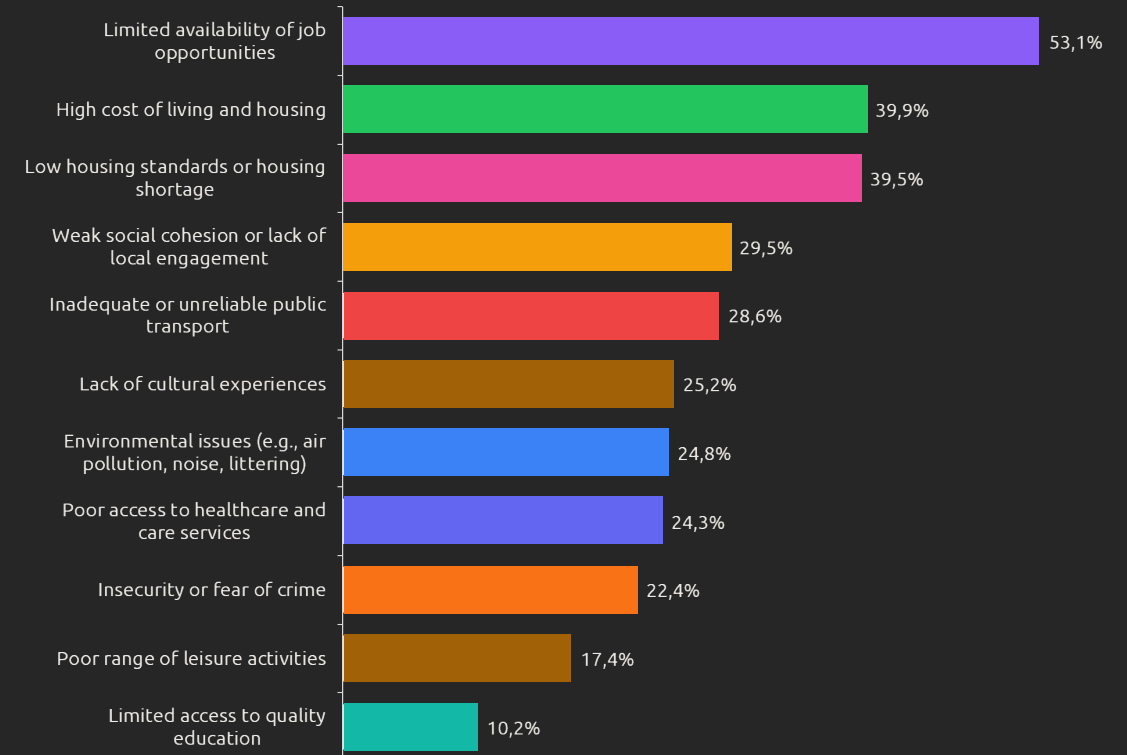
Feeling at Home?

Looking at both the Place assets that are appreciated the most (left) as well as the main concerns and/or perceived risks regarding their relocation to Twente Region, **fostering social cohesion and integration in the local community** will make more internationals feel at home

What do you think Twente does well?



What are your main concerns or perceived risks of living in Twente?



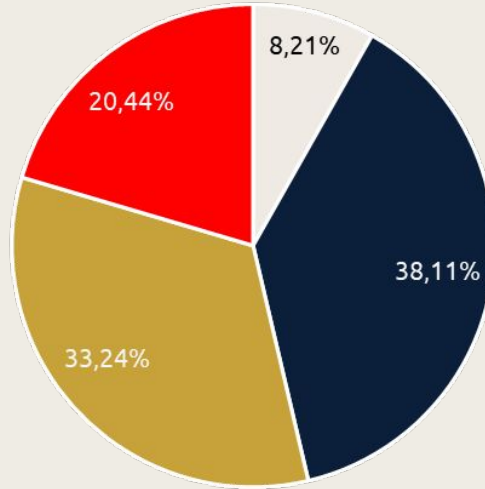
N (currently living in Twente Region) = 674

Likelihood move to / stay in Twente if a great job opportunity arises

Twente

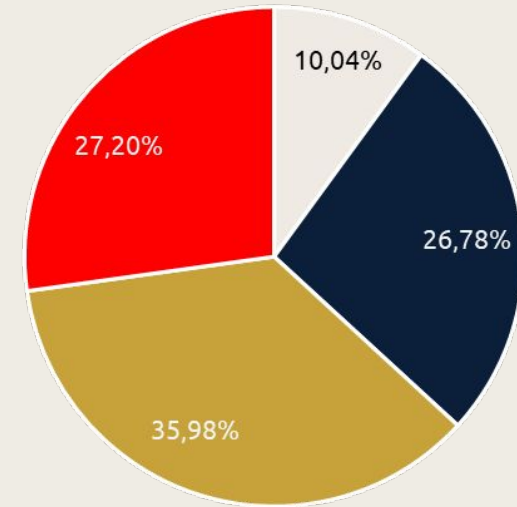
> 54% overweegt sterk naar Twente te verhuizen mits mooie carrièrekansen.

Attracting talent



N = 1766
Respondents
abroad

Retaining talent



N = 239
Residents

63% denkt aan blijven in Twente mits mooie carrièrekansen.
37% overweegt niet te blijven.

□ Not likely ■ Somewhat likely ■ Likely ■ Very Likely

Conclusies

7

Twente

Conclusies

1. Grote, groeiende & overlappende vraag naar talent

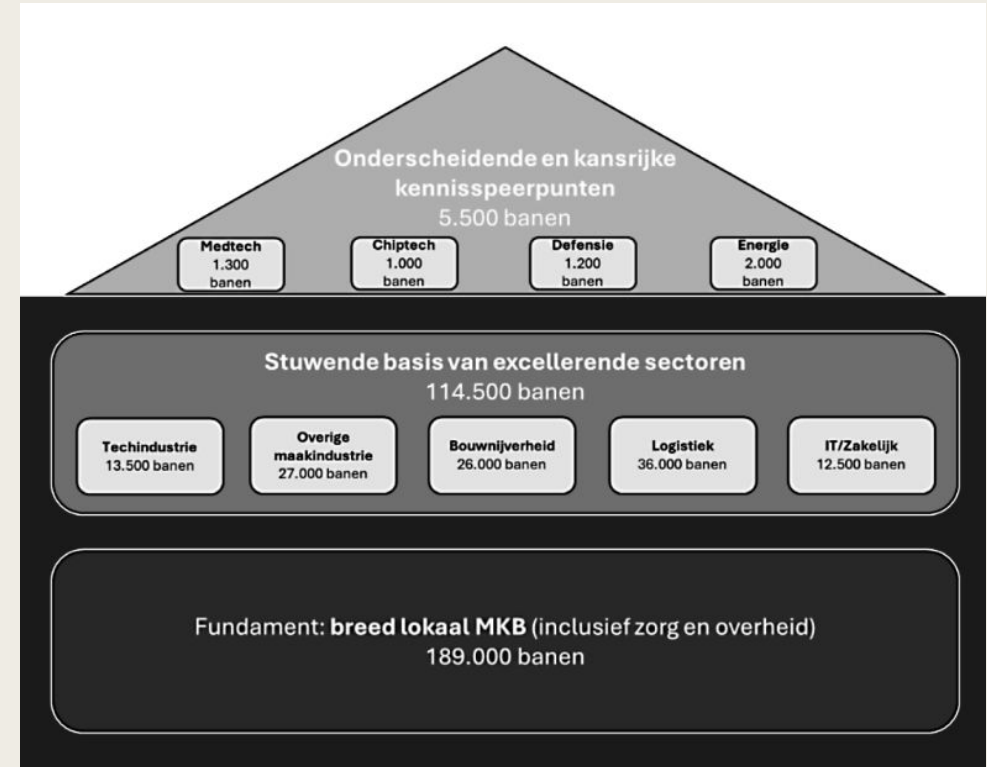
- 9 - 10.000: cross sleuteltechnologieën en clusters
- Focus mid-career, van mbo (30%) tot academisch
- Structurele schaarste; potentieel (van) elders o.a. generiek in India, Canada, VS en specifiek ook in andere landen)

2. Zichtbaarheid en imago grootste knelpunt

- 7,7 converteert nog weinig | retentie risico (63%)
- > 50% kent Twente nauwelijks als carrière bestemming
- Banen en carrière paden lastig vindbaar en toegankelijk, internationale werving MKB beperkt, en huisvesting speelt mee.

3. Regionale strategie en talent intelligence moeten sterker

- Sterke high-tech en innovatie capaciteiten, GEEN één duidelijke gezamenlijke identiteit.
- Aanpak kan integraler en meer gericht - 'most wanted'
- Draagvlak en -kracht ondernemers is nog beperkt





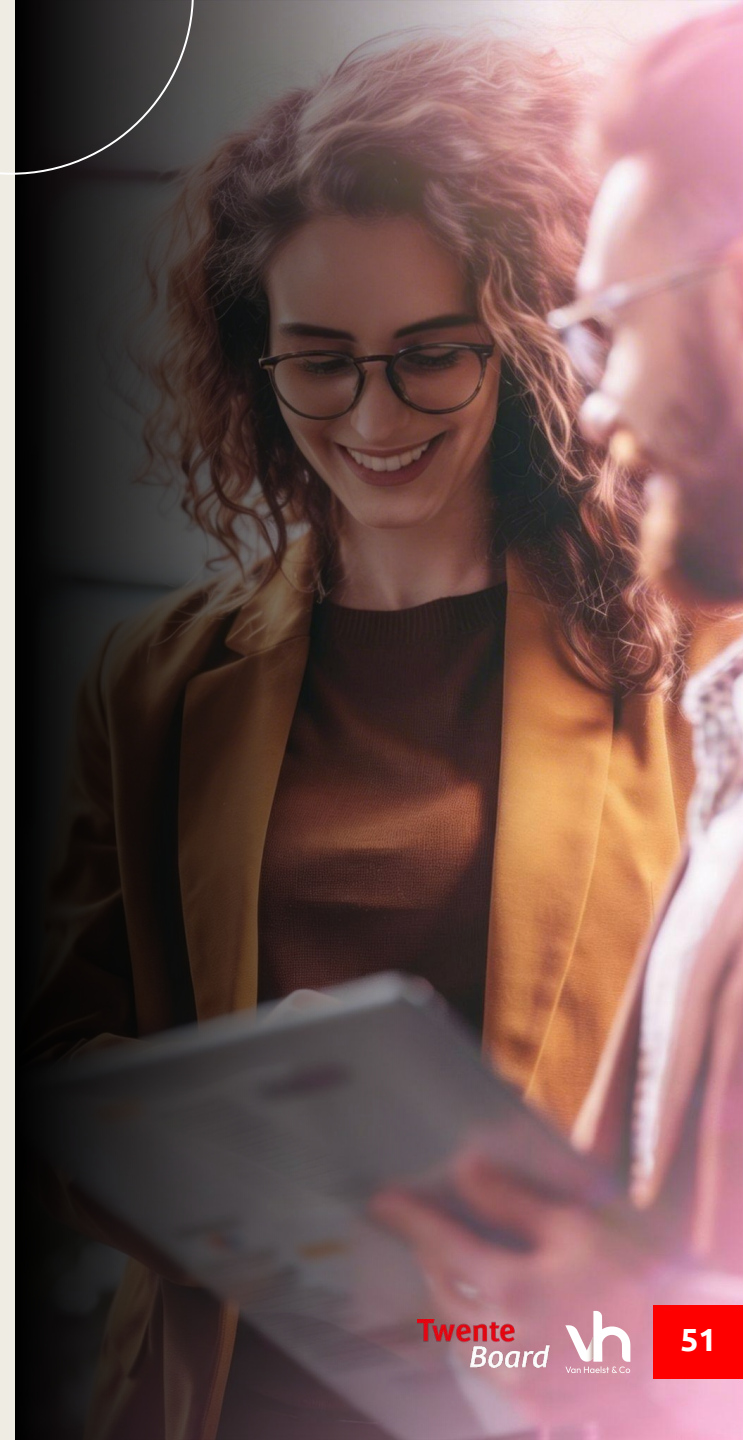
Aanbevolen acties

8

Twente

Aanbevelingen

1. (Door-)ontwikkelen centraal carrière portaal – marketing & promotie!!!
2. Positioneer Twente als een groene, next tech carrière bestemming – toolkit
3. Richt de marketing op 'the most wanted' in de juiste markten met de juiste boodschap
4. Optimaliseer de klantreis voor (internationale) talent - infovoorziening en beleving 5PM - 9AM.
5. Twente Talent Observatory - data gedreven werken
6. Benut de impact van 'talent' in de Twente-strategie en versterk de 'employer-ability'.



THANK YOU

Voor meer informatie:

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