



# *Employment and Skills in Sport and Physical Activity*

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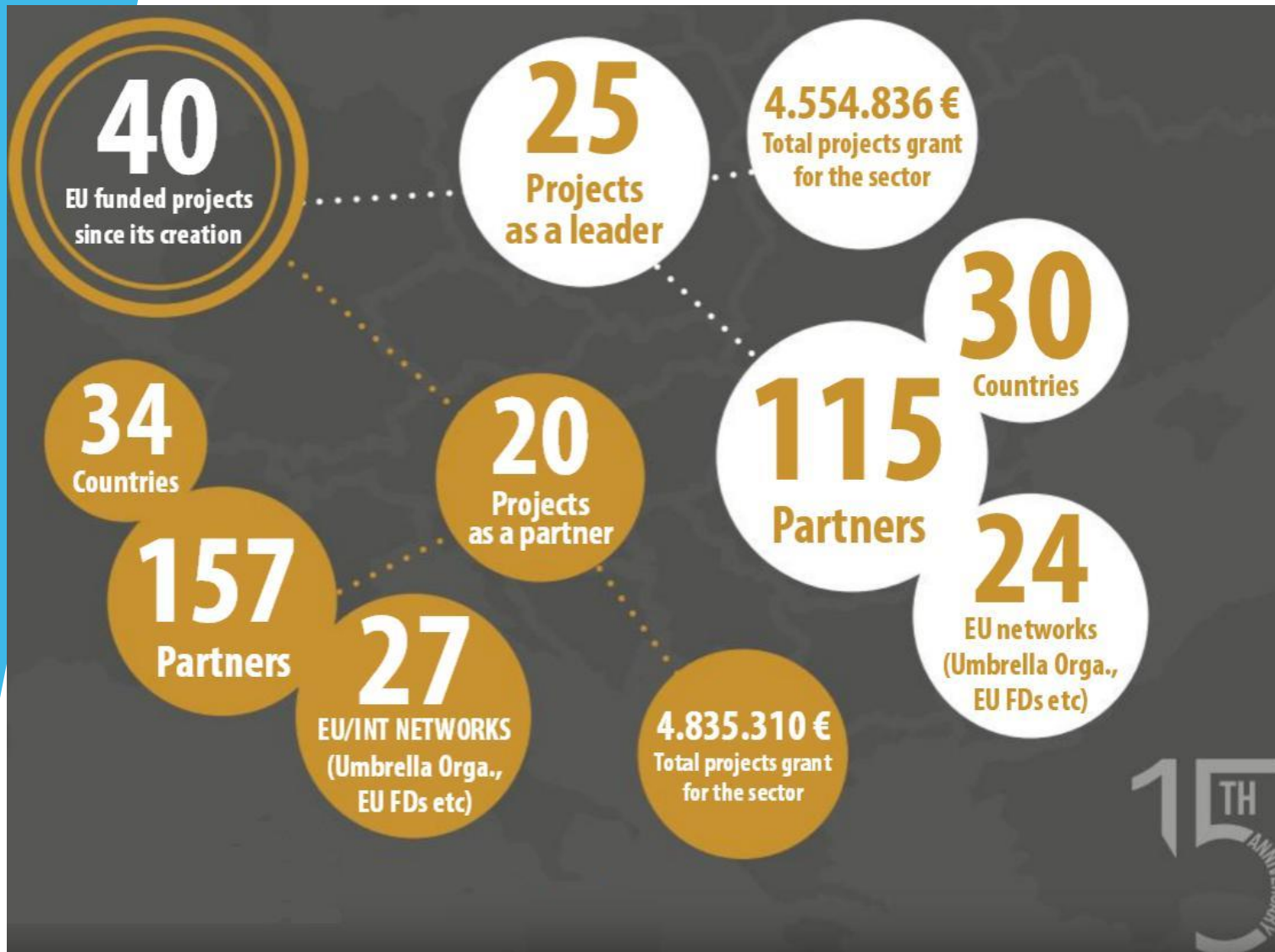
# INTRODUCING EOSE

- ▶ **Independent not for profit organisation** (France, 2002)
- ▶ **EU membership and network** (20 Countries)
- ▶ **Knowledge and expertise** in the sport and physical activity sector, labour market and VET policy
- ▶ Small central team - support and management
- ▶ **Specialisation:**
  - ▶ Sport and Physical Activity sector
  - ▶ Sport Education Systems
  - ▶ Workforce development
  - ▶ Linking education to the labour market
  - ▶ European policies and initiatives
- ▶ Recognised as **expert/adviser** by EC

# EOSE VISION FOR THE SECTOR

- ▶ Sport fulfilling its potential as a social and economic driver
- ▶ Better sport and healthy lifestyles for all
- ▶ **Improved service to meet the specific needs of every client**
- ▶ Delivered through better skilled people
- ▶ Fit for purpose qualifications and training (cooperation)
- ▶ Reflecting employment needs based on updated and consistent labour market information
- ▶ Clear employment and career structure and pathways
- ▶ Sport fully integrated into NQF and EQF – qualifications delivered nationally based on common standards
- ▶ Transparency, transferability, mobility
- ▶ Volunteering and informal learning valued and recognised

# INVOLVEMENT WITH EU PROJECTS





# Introducing: The EUROPEAN SECTOR SKILLS ALLIANCE (ESSA-Sport)

## Key Actions within Erasmus+

### Learning Mobility

- Staff
- High education students
- Vocational and education training students
- Master students
- Youth mobility

### Co-operation for innovation & good practices

- Knowledge Alliances
- **Sector Skills Alliances**
- Strategic Partnerships
- IT support platforms
- E-twinning
- Capacity building in third countries

### Support for policy reform

- Open Method of Coordination
- EU transparency tools
- Policy dialogue

# THE OPPORTUNITY

- ▶ Erasmus+ Key Action 2 – Sector Skills Alliances
- ▶ 500,000 Euros maximum over 2/3 years

## SSAs aim at:

- ▶ **Tackling** skills gaps by identifying sector specific labour market needs and new skills in one or more occupation
- ▶ **Strengthening** exchange of knowledge between education and labour market
- ▶ **Modernising** VET, integrating work-based learning, exploiting potential to drive economic growth and innovation
- ▶ **Building** trust, cross-border certification, professional mobility, qualification recognition

# MAIN OBJECTIVES OF THE CALL



To implement research on labour market needs in the sector for identification and definition of future skills needs



To encourage collaboration between public and private actors on the labour market



To identify and anticipate persistent skills shortages and mismatches at sectoral level



To help fill the gap between labour supply and demand



To maximise synergies with other sectoral initiatives



# SPECIFIC AIMS

**1**

**UNDERTAKE DESK  
RESEARCH (N/EU)**  
*(labour markets, sport  
systems,  
education/qual.  
systems)*

**3**

**ENSURE WIDE  
CONSULTATION  
AT NATIONAL  
AND EU LEVEL**  
*(Bottom-up  
approach)*

**5**

**IDENTIFY  
PRIORITIES FOR  
ACTION AT  
NATIONAL AND  
EU LEVEL**

**2**

**CONDUCT EU  
ONLINE EMPLOYERS  
SURVEY ON SKILLS  
NEEDS**

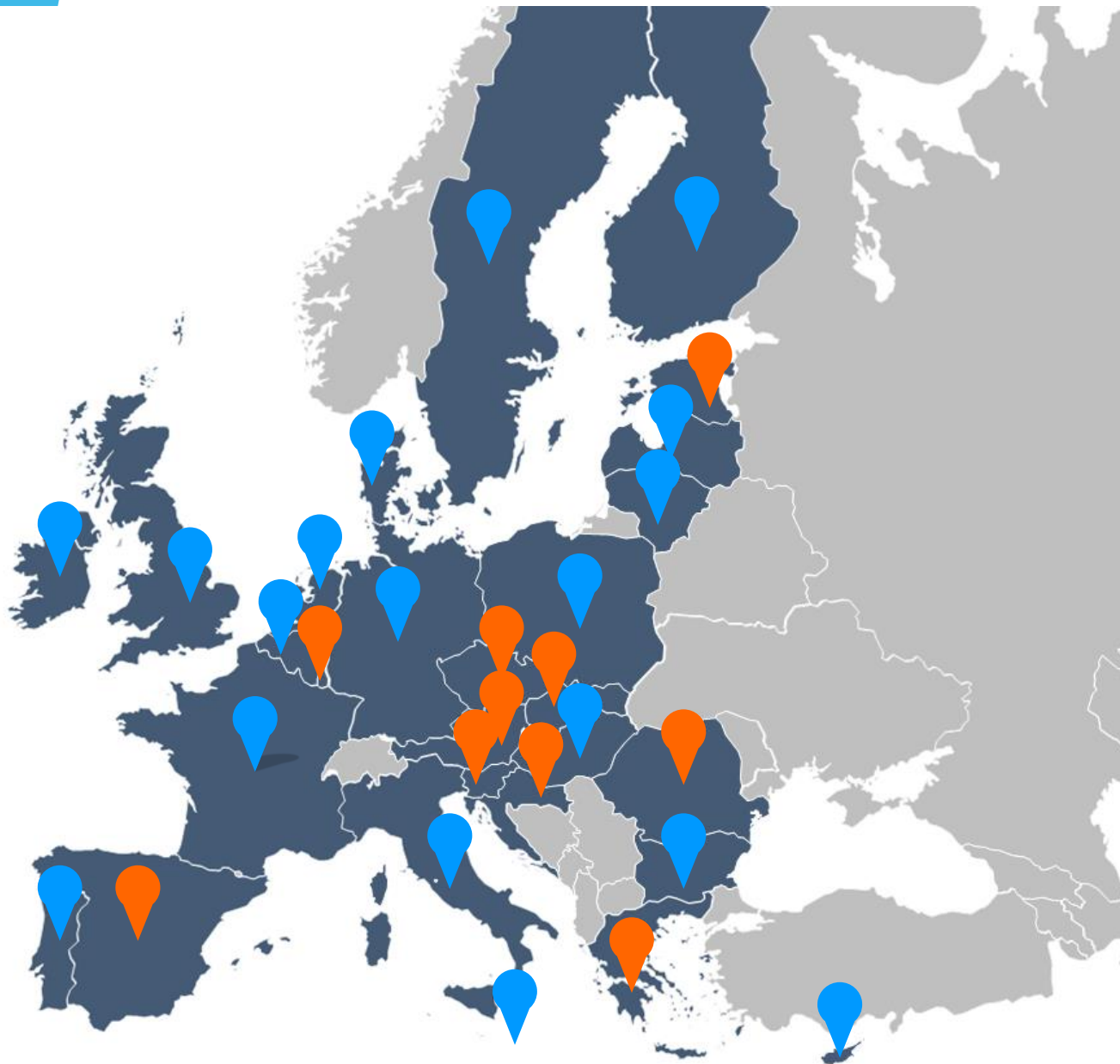
**4**

**DEFINE AND  
UNDERSTAND THE  
SECTOR**  
*(Realities, skills needs,  
tendencies etc)*

**6**

**ESTABLISH  
SUSTAINABLE  
NETWORK OF  
STAKEHOLDERS  
AND WORK PLAN**

# SCOPE – EUROPEAN UNION



**OFFICIAL PARTNERS  
OF ESSA-SPORT  
= 18 COUNTRIES**



**COUNTRIES  
WITHOUT OFFICIAL  
PARTNER =  
10 COUNTRIES**



# Outputs

From this process to produce:

- 🔗 **National Reports** (20 + 8) – research, consultation, validation
- 🔗 the **first Employment Map** of the sport sector across the EU based on the National Reports (bottom up approach)
- 🔗 the **first Skills Profile (Map)** of the sector's current and future skills needs across the EU
- 🔗 a **sustainable network** of sector stakeholders (**Sector Skills Partnerships**) at national and EU level to lead action to address the skills priorities identified in the reports
- 🔗 and to **establish a EU Strategic Action Plan with concrete recommendations and priorities**
- 🔗 To inform the EU tools – the **EU Skills Panorama** and **ESCO**

# Why is the ESSA Important?

- ▶ We all believe in the power of sport and physical activity to change lives
- ▶ It has huge potential to create jobs, to generate economic activity, to improve health, to engage communities and support social cohesion
- ▶ Yet it is hugely fragmented – by nation, by sport, by sub-sector, public sector from private sector etc
- ▶ We are failing to engage the whole community – too few are active, the disadvantaged and those with disabilities are under-represented
- ▶ Success depends on a skilled workforce – managers, instructors, coaches etc – working together to deliver opportunities for activity for all
- ▶ We are a people focussed industry
- ▶ Can ESSA provide a focus for collaboration and change?

# ESSA-SPORT - OPPORTUNITY

- ❖ To **engage the whole sport and physical activity sector** at both the EU and national level
- ❖ To raise the profile and **understanding** of the sector
- ❖ To undertake a **real analysis** of labour market and skills needs/priorities for the whole sector
- ❖ To **identify** realities and challenges facing the sector
- ❖ To create a **sector response** to these challenges as a basis for action (*concrete priorities and recommendations*)
- ❖ To provide **action plans at national and EU level** as the basis for the sector to **achieve its potential and meet its challenges**

## EUROPEAN POLICIES: EUROPE 2020 STRATEGY



### SPORT

EU White paper on sport  
2007

Lisbon Treaty - Art. 165  
2009

Communication on  
"Developing EU  
dimension in Sport"  
2011

EU Work Plan Sport  
2011-2014

EU Work Plan Sport  
2014-2017



### EDUCATION

E&T 2020: Strategic  
framework for coopera-  
tion in education and  
training  
2009

Joint Education and  
Training Report on the  
implementation of  
ET2020  
2015

Paris Declaration on  
Promoting citizenship  
and common values  
2015



### EMPLOYMENT & SKILLS

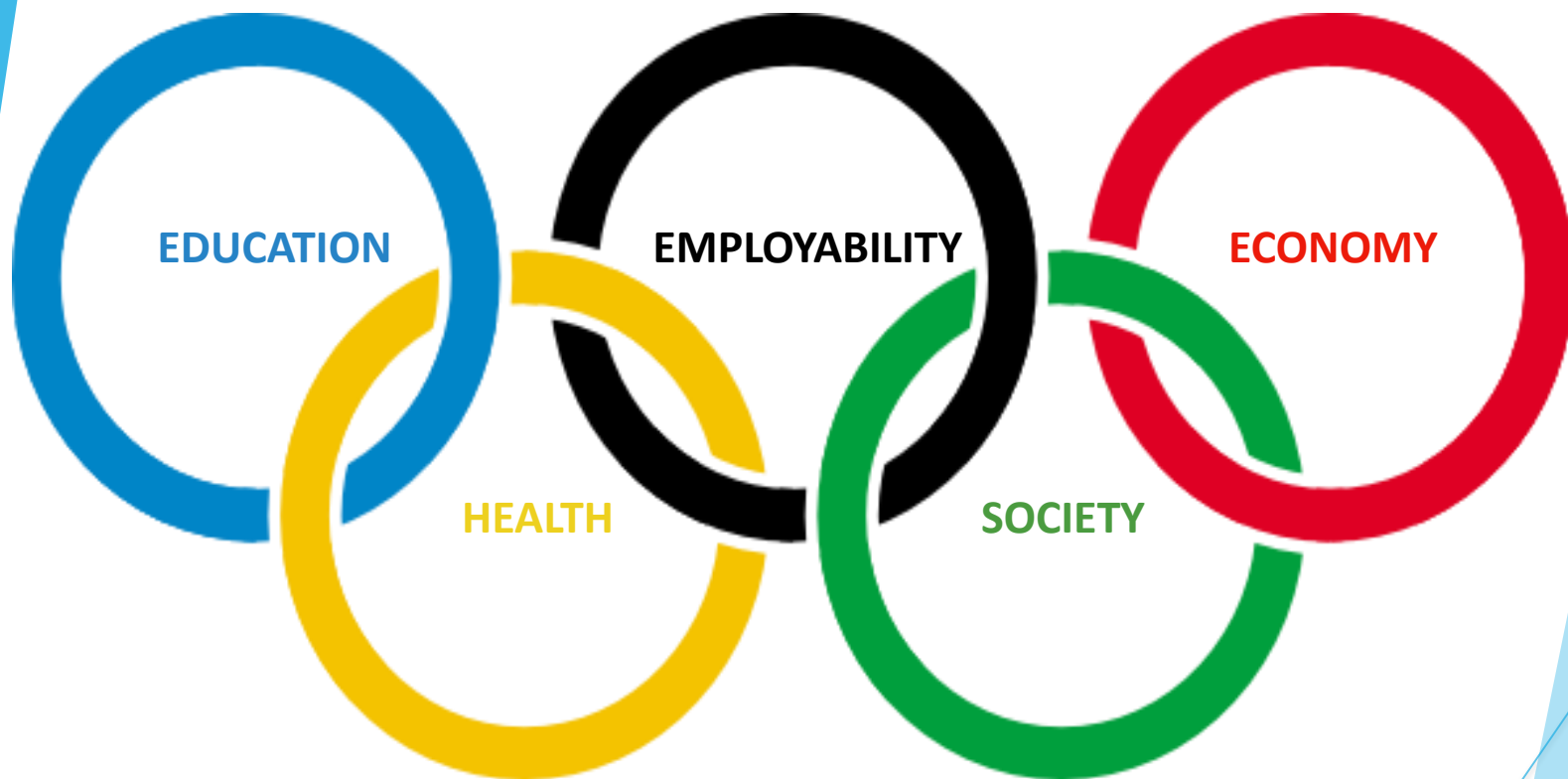
New Skills for New Jobs:  
Anticipating and  
matching labour market  
& skills needs  
2009

Youth on the move  
2010

New Skills Agenda for  
Europe  
2016

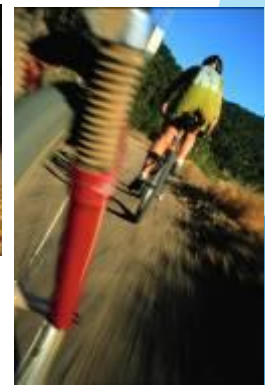
- ✓ Anticipating and matching labour market and skills needs
- ✓ Link the world of work and world education
- ✓ Improve quality and efficiency of education and training
- ✓ Equip citizens with right skills and competencies to perform in a job
- ✓ Support inclusive education, equality, non-discrimination, civic competences
- ✓ Increase VET attractiveness by showcasing examples of excellence and quality

# IMPACT and NEW EXPECTATIONS



# SCOPE – Sport & Physical Activity

**"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."**





# SCOPE - NACE CODES

- ▶ **93** Sports activities and amusement and recreation activities
- ▶ **93.1** Sports activities
- ▶ **93.11** Operation of sports facilities
- ▶ **93.12** Activities of sport clubs
- ▶ **93.13** Fitness facilities
- ▶ **93.19** Other sports activities
- ▶ **85.51** Sports and recreation education\*

*\*This class includes the provision of instruction in athletic activities to groups of individuals, such as by camps and schools. Overnight and day sports instruction camps are also included. It does not include academic schools, colleges and universities. Instruction may be provided in diverse settings, such as the unit's or client's training facilities, educational institutions or by other means. Instruction provided in this class is formally organised. This class includes:- sports instruction camps, sports instruction, gymnastics instruction, riding instruction, academies or schools, swimming instruction, professional sports instructors, teachers, coaches, martial arts instruction, card game instruction (such as bridge), yoga instruction.*

# Warning

- ▶ Statistics in this presentation have been produced in dialogue with Eurostat
- ▶ Still be tested with national co-ordinators and discussed with NSOs
- ▶ Labour Force survey – same methodology
- ▶ But different level of detail e.g only 20 countries breakdown occupations to 4 digits

# What does employment in sport look like?

- ▶ Sport Organisations – NACE code 93
- ▶ Total Employees – 1,295,293

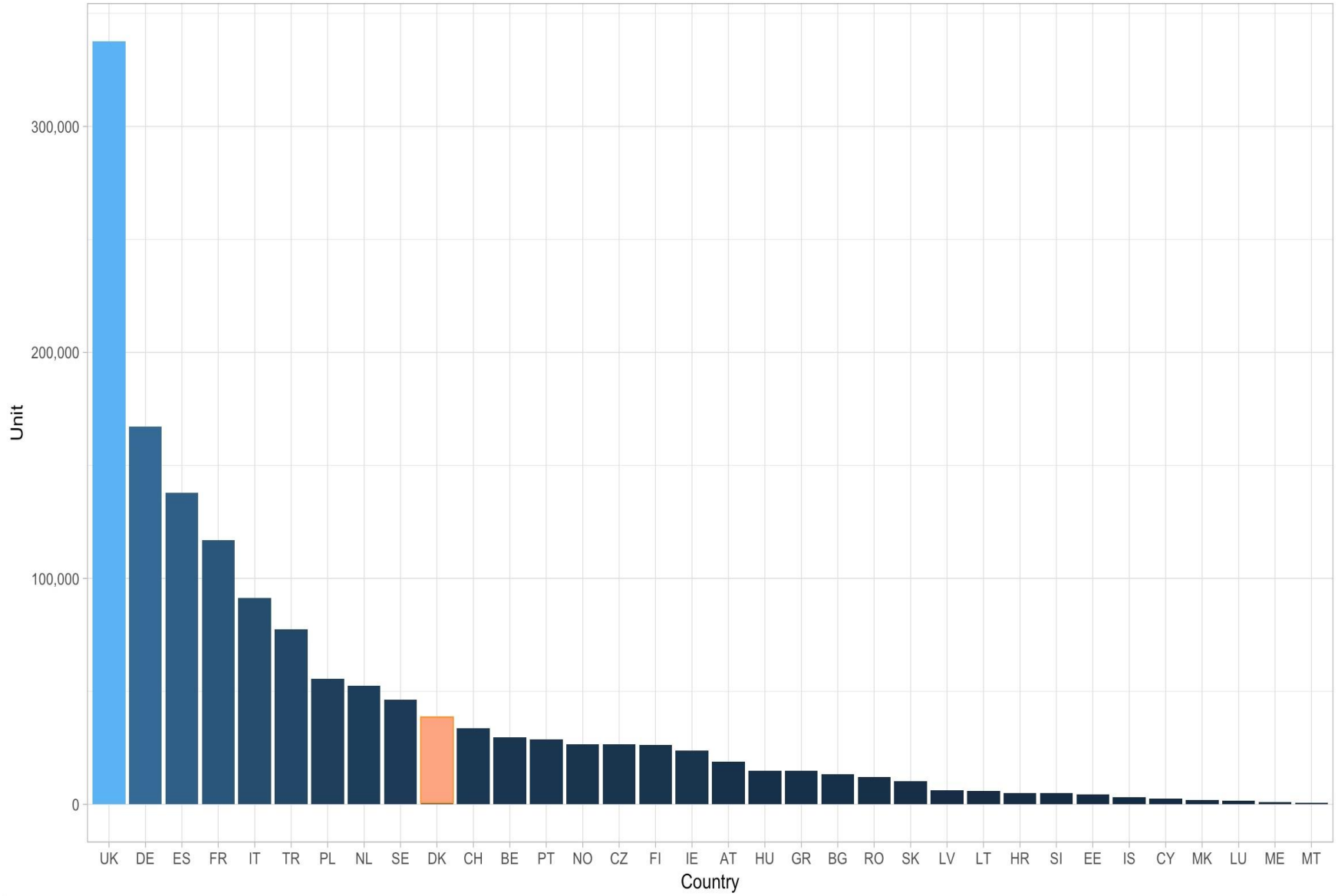
Including:

- ▶ 476,020 Sport Occupations (37%)

ISCO code 342 including:

- ▶ Athletes and players
- ▶ Coaches, Instructors and Officials
- ▶ Fitness and Recreation Instructors
- ▶ 819,273 Sport related Occupations
  - ▶ (114,967 Managers)

Total Employees per Country



# Sport Organisations

Largest employing countries:

- ▶ UK (26%)
- ▶ Germany (13%)
- ▶ Spain (10%)
- ▶ France
- ▶ Italy
- ▶ 9<sup>th</sup> Denmark (c25,000)
- ▶ 50% in top 3 countries
- ▶ 1 in 4 jobs will be lost to EU job market with Brexit!

# Sport Organisations Characteristics:

- ▶ 57% full time
- ▶ 84% employed
- ▶ 15% self employed
- ▶ Age – 15-24: 25%
- ▶ Age – 25-49: 53%
- ▶ Age – 50+: 22%
- ▶ 43% female
- ▶ Education - Graduates+ 32%
- ▶ Education - Medium: 50%
- ▶ Low Education – 18%

# Other Sectors – sport occupations

- ▶ Sport occupations
  - ▶ Athletes and players
  - ▶ Coaches, Instructors, Officials
  - ▶ Fitness and Recreation Instructors
- ▶ Sport Organisations – **476,020**
- ▶ Other Sectors – **432,117**
- ▶ **Total Employment in Sport**
  - ▶ Sport Organisations – **1,295,293**
  - ▶ Sport Occupations outside sport – **432,117**
  - ▶ **TOTAL – 1,727,410**

# Other Sectors using Sport

Total Sport Occupations – **908,137**

Sport Occupations outside sport - **432,117**

Sport Education (85.5) - **175,670**

Other Education – 50,710

Public/community sector - 45,675

Health/Social care – 29,840

Accommodation/Hotels - 15,718

Agriculture/water – 13,062

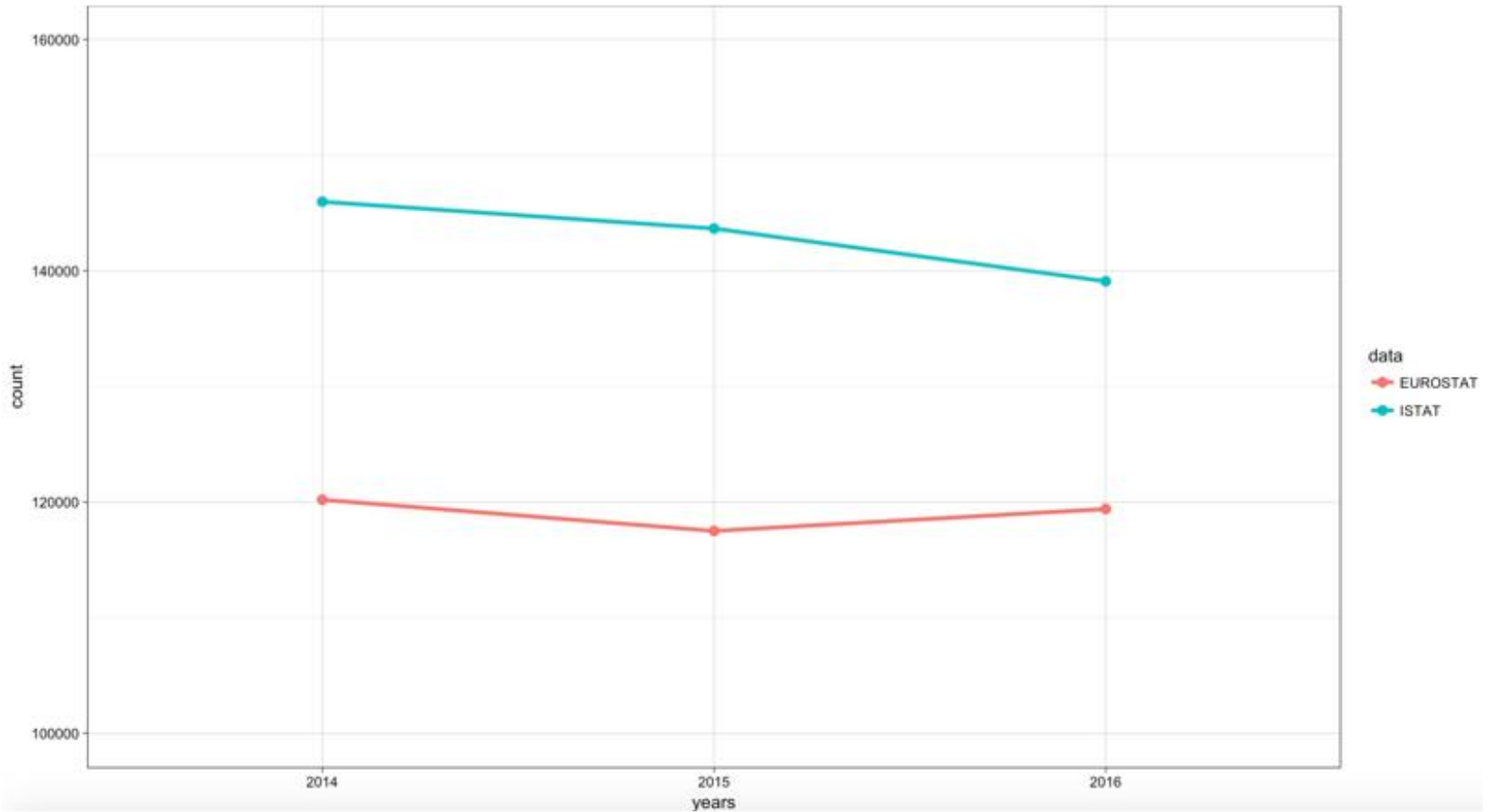
Membership Orgs – 10,040

▶ But is this still an underestimate?



# Italy Case Study

Employment in sport, Italy, EUROSTAT/ISTAT data comparison



# Sport Occupations

- ▶ Full time 52%
- ▶ 57% male
- ▶ Self employed 32% (15% in sport orgs)
- ▶ 58% age 25-49
- ▶ Education: Medium – 46%
- ▶ Education: High - 42% (32%)

Athletes: 53,474\*

Coaches: 351,038\*

Fitness & Recreation Instructors: 249,007\*

\* *Based on 20 countries*

# Feedback - National Round Tables

- ▶ A **growing** sector in a Europe that is changing and being challenged - e.g migrants/refugees/youth unemployment
- ▶ **Changing roles/expectations** of States and Federations
- ▶ Austerity and public spending cuts
- ▶ A **people facing sector** where a **skilled and qualified** workforce, is paramount to its success.
- ▶ A sector driven by **volunteers** in Europe: 35 million Volunteers in Sport (= 7% population EU)
- ▶ Challenges in delivery, challenges from Government, challenges in skills

# CHALLENGES for FEDERATIONS

- ▶ To achieve international success
- ▶ To maintain integrity of their sport (doping, match fixing)
- ▶ To sustain and grow their clubs
- ▶ To improve and update governance at all levels
- ▶ To improve gender equality (leaders, coaching, participants)
- ▶ To become inclusive (including those with disabilities)
- ▶ To bring qualifications inside formal system (NQF/EQF)
- ▶ To link international federation requirements with national systems

# CHALLENGES – PRIVATE SECTOR

- ▶ To integrate the growing private sector and new entrepreneurs into the established “system”
- ▶ Regulate or not? – a challenge to established structures in the Sector
- ▶ Concern of regulators - quality/health and safety?
- ▶ Validity of training and qualifications
- ▶ Lack of structure and organisation
- ▶ Big potential in fitness, in activity tourism
- ▶ Emergence of small businesses and growth of international chains

# REALITIES AND CHALLENGES

- ▶ Potential often **underestimated or not recognised** but **expectations are growing**
- ▶ Employers **seeking well trained employees** but existing courses **not regarded as sufficiently relevant** – **there is a recognised gap** between competences required and learning outcomes acquired
- ▶ Sport training often **outside national qualification structure**
- ▶ **VET very limited** in the sector in many countries
- ▶ How clear is the Sector **career structure and pathways?**
- ▶ **Which course? Which job?** – key questions for young people: do we have the answer?
- ▶ Increased desire of **mobility** – **how transferable are skills and qualifications?**

# Next Steps - please get involved

- ▶ June 2018 – October CONSULTATION phase
- ▶ National Stakeholder Groups (IDAN)
- ▶ On-line EU questionnaire (in Danish)
- ▶ Focus – recruitment and skill needs of your organisation
- ▶ December 2018 – National Report
- ▶ Sport System
- ▶ Education and training supply
- ▶ Labour Market
- ▶ Skills priorities – from consultation
- ▶ [www.essa-sport.eu](http://www.essa-sport.eu)