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*SPORT AND EMPLOYMENT
IN EUROPE*

FINAL REPORT

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SUMMARY

- ◆ The purpose of this study, requested by DG X of the European Commission, is not only to take stock of employment (volume and characteristics) in the field of sport in the European Union, but also to obtain a better understanding of the institutional regulatory mechanisms at work in this very specific field. The aim is to propose a discussion with a prospective slant, enabling the operators of the European Union to target their strategies more effectively, with a view to developing employment and ensuring working conditions which are favourable to both employees (or self-employed workers) and entrepreneurs in sporting activities, whilst respecting the specific nature of sport.
- ◆ The first part presents the sports sector and sports-related sectors. The economic activities directly related to sport are identified (operation of sports facilities, supervision of sporting activities), as well as those necessary to, or generated by, sporting activities (production, distribution of sports goods, sports journalism, etc.). The term “sporting activities” covers several sub-sectors of varying degrees of importance. Professional sport for entertainment accounts for only a limited proportion of the abundance of jobs produced, although it is growing rapidly. The most important branch is that of leisure and tourism organised under the sectors of associative sports, leisure associations, and leisure and sports-related tourism companies. It draws 30% to 40% of the population of the EU. The organisation of sports competitions within clubs, which is at the heart of the sports movement, concerns under 10% of the EU population. Growth in the number of people employed in this segment is slow. Finally, we considered all the uses of sport to promote the integration of groups of the population in difficulty. This is a field which seems to be growing, but poses problems of identification and measurement which are difficult to resolve. The activities relating to sports are very numerous and fragmented. They range from the construction of sports facilities or equipment, to the manufacture and sale of sports goods, to all the related services (press, television, transport and special accommodation, public administration, education and training, health care, etc.). We show the economic importance of these activities and their growth accompanying that of the practice of sports. The data relating to these fields should, however, be considered with caution as it is still difficult to isolate the corresponding activities in the public statistics.

- ◆ The second part focuses on a preliminary comparative stock-taking of employment in sport in the EU Member States. Three quantitative statements can be made. The sports sector officially represents just under one million jobs (main occupation) in the 15 EU Member States. The number of jobs has risen very sharply in the past 10 years (on average over 50% more jobs), clearly confirming that sport, in its various forms, constitutes an interesting source of employment. The situation differs considerably from country to country, even taking account of the differences in the volume of activity (which varies considerably between the north and south of Europe). This depends not only on the role played by the various sports operators (associative, public, commercial). The existence of a large commercial sector seems to promote employment, even though it poses problems with regard to the consistency of supply in the sports sector and its ability to respond to all the social demands. From the qualitative point of view, the "sports professions" form a group, with each occupation having its own background, which is specific to each country and in the process of emerging for a large number of them. Training and the national regulations on the subject are an additional source of difficulty for forging "European occupational identities". Nevertheless, a convergence process is under way. It should be based on the recent development, in a still limited number of countries, of a social dialogue between employers and employees which is essential to standardise working conditions and to ensure better adaptation to the needs of enterprises. The public authorities, which start out from different situations and ideas as regards employment initiatives and regulations, also seem to be engaged in a convergence process.

- ◆ The third part aims to give an outline presentation of the kinds of balance to be observed in the various Union Member States between the sports system operators. The three configurations identified correspond to three dominant types:
 - The first, which we have termed "bureaucratic", is mainly run by the public authorities (central governments and local and regional authorities). It is characterised by voluntarist employment policies conducted with the active participation of a large number of public sector staff.
 - The second, which we have termed "entrepreneurial", adjusts to the various forms of demand and is based on initiatives conducted in an associative or commercial context. It is little regulated by the public authorities and the overall consistency of the sports system is sometimes in jeopardy. It nevertheless allows a high level of employment.

- The third, which we term "mission-based", is characterised by the very marked presence of associative operators. The public operators leave it to them to define and implement the sports policy and the scope left to the commercial operators is relatively limited. This leads to a situation where employment in sport is little developed and where a certain resistance to the professionalisation of sports supervision is emerging.
- ◆ The fourth part offers a prospective analysis of employment in sport in Europe up to the year 2010. It identifies three scenarios, three pictures of the future, on the basis of which the participants in the development of sports can position themselves and direct their actions. Beyond the predominant trends (making sporting activities more widely available and diversification of the practice of sports, overall growth in employment, etc.), several uncertainties have a bearing on the development of the system of employment in sport and are capable of threatening the foundations on which sports ethics are based. The first refers to the revelations of the "scandals" in the world of sport, whether involving doping or corruption. These in fact seem to be becoming increasingly systematic and are liable to alienate spectators and television viewers and cause financiers and unpaid volunteers to withdraw. The second relates to the role of virtual games in the field of practising sports. Absorbed with the "video culture", are the new generations not liable to abandon sports for the pleasure of the make-believe? Will video games not take the place of practising "real" sports? The third uncertainty relates to the future of the professionalisation of sports associations. In fact, although the transformations in the demand for sports draw the associations towards the production of quality sports services, the rationalisation of these organisations seems essential. However, the form which the professionalisation will take still has to be devised and cannot simply reproduce the enterprise model. What is at stake in this development depends on the ability of the sporting world and its partners to professionalise the sports associations without them losing their identity. The final great uncertainty concerns the configuration of the relations between all the sports operators and their ability to cooperate with one another. The three scenarios combine these four uncertainties and major stakes in different ways. The first (standardised individualisation of sports services), which is certainly the most pessimistic, describes a society in which virtual sport has stolen a march over the practising of sports, where the sports ideal collapses and where commercial regulation dominates the new sector of jobs in sports, which on the whole require few qualifications. The second (duality of sports services), which is more mitigated, considers the survival of the sports ethic in a movement of resistance to professionalisation. "Two-speed" sports

services are then produced, which in turn refers to a dual functioning of the employment markets in the sports sector: on the one hand, skilled, well-paid jobs in the large enterprises, on the other, jobs involving little skills and poorly paid in the small structures. The final scenario, which is certainly the most optimistic (new alliance of sports services), evokes a revival of the sports ideal combined with account taken at public policy level of the predominant trends in the development of the practice of sports (self-organised sport, sport as a leisure activity, etc.). The latter implies strong diversification of the sectors for occupational integration. Under such a scenario, the regulation of employment in sport is based on a balance between the bureaucratic, entrepreneurial and mission-based approaches. Collective bargaining allows the relationship between training and employment to be optimised and a good level of qualifications to be ensured. On the other hand, there is the professionalisation of the sports associations with a view to redefining their task and identity.

- ◆ In conclusion, we propose that the persons responsible concentrate their activities in four main directions:

1- Develop the sector by organising the relationships between the sports operators

This involves building a system ensuring complementary relations between associative operators (sports movement) public operators (local and regional authorities, central governments) and commercial operators (sports entertainment or leisure companies). The specific tasks of these operators must be specified or reaffirmed.

2- Boost the skills of the human resources in the associative sector to promote social development.

A certain form of professionalisation of the associative sports movement is undoubtedly a response to the crisis it is experiencing almost throughout Europe. However, any professionalisation leading to a weakening in associative spirit (to give way to a user or customer mentality) would be counter-productive. The many initiatives taken in the European Union Member States to develop employment in the associative sports sector, especially in the highly suitable context of the ILDE, should be conducted in this spirit.

3- Construct a professional “sports” sector as a prerequisite for improving the quality of employment in sport.

The world of sport based on unpaid volunteers has not always sized up the requirements of the move towards professionalisation, especially with regard to respect of labour law. The uncontrolled increase in the number of part-time jobs, the almost total lack of collective consideration of the seasonal nature of sport, the inadequacy of measures for retraining top-level sportsmen are a consequence of the low level of recognition of the potential role of the social partners and the social dialogue in the sports sector. A public initiative should facilitate the emergence of representation of the sector at national and European levels (based on what happens in the United Kingdom and France, for example).

4- Improve the relationship between training and employment and the capacity for occupational integration in the sports sector

The occupational integration of young people in sports companies and associations often takes place under difficult conditions. On the other hand, the sports movement rarely has the means to provide the training to meet the needs. The result is that the number of people engaging in a profession in the sports sector without suitable training is very high in most EU Member States. Better adaptation of training to employment in a sector of very small enterprises entails systematic development of schemes combining training and work defined and negotiated by the social partners.

Although it corresponds to general principles common to all the services sectors, the respect of the social functions assigned to sport must lead to the development of employment in the sports sector being undertaken in a way which is in keeping with this specific character.

INTRODUCTION

Today, on average one European in two engages in a “sport”, of whom one in five within federated associations, and almost all watch sports events live or on television. Very widely organised on an associative basis, sport relies on the public authorities to differing degrees depending on the country and has acquired an increasingly commercial slant in recent years. Beyond its immediate confines, it has an impact on a series of activities which affect a large number of different sectors: construction of facilities, sports goods, clothing, food, health care services, information and communication).

Sport has been identified as a growth area offering job creation potential (White Paper, etc.). The statistical data available in several European countries¹ in fact show that since 1980, the number of jobs classified under sporting activities (NACE code 92.6) has tripled and that this trend seems to be ongoing.

Three main reasons can be put forward:

- the development of sporting activities themselves affect different groups of the population (the elderly, youngsters getting back into society, the disabled, etc.) and meet a variety of needs (leisure, health, entertainment, education);
- the indirect effects of raising the standard of living of Europeans, who devote a growing proportion of their income to expenditure on leisure and health (especially leisure activities in the sports field) ;
- the change in the “supply of sport” which is becoming increasingly professional (the commercial facet of sports activities is growing; associative sport draws a growing number of professionals).

The question is how this development can be accompanied, facilitating job creation, but without at the same time weakening associative sport and its effects on strengthening social links. The policy of developing employment in sport in Europe appears entirely in keeping with the introduction of a “European model of sport”, which aims for optimum

¹ Data collected and compared in France, the United Kingdom, Italy and Belgium - OEES, publication in progress.

combination of the intervention of the associative and commercial operators (local and national).²

The characteristic of what could be called the “European system of sport” stems from a balance between types of operators which is very different from that observed in other parts of the world. Because of its functions with regard to health, integration and cultural identity, sport is of interest to the public authorities; because it constitutes a strong growth market, companies are attracted to it; because it is still a focus for voluntary team organisation and development of social integration, associationism must retain its full role.

Aims

The aims of this study are:

- 1) to take stock of employment in sport in Europe in the various sports services sectors in terms of quantity and quality;
- 2) to identify the main problems relating to working conditions and the trend in them (professionalisation of the sports associations, lack of job security, etc.) ;
- 3) to show the forms of institutional regulation of the relations between employment and training;
- 4) to draw up scenarios for the development of employment in sport;
- 5) to propose recommendations on the basis of principles to be implemented.

Methodology

The report is based on a bibliographical analysis relating to employment in sport, the collection of new data and collective discussion and imagination to construct scenarios for the development of employment in sport in Europe. These images of the future are tools to assist in decision-making for the sports operators in Europe.

² The European Model of Sport, DG X

Plan of the report

The report comprises five parts. The first presents the sports sector and the sports-related sectors with a view to defining the object and scope of the study.

The second provides a description of employment in sport in Europe in terms of both quantity and the organisation of work and employment policies. This part enables the main characteristics of employment in sport in Europe and the trends in its development to be identified.

The third part adopts a more global perspective and allows the main types of national structures and the main ways in which employment in sport is regulated in Europe to be picked out. Briefly, there are three kinds of models to be found: the bureaucratic model (government intervention), the entrepreneurial model (the market) and the mission-based model (associative). This typology serves as a basis for drawing up the scenarios for the regulation of employment in sport up to the year 2010.

The fourth part recapitulates the previous parts and places them in a prospective context. The uncertainties and major stakes with an impact on the development of the system of employment in sport are selected to establish three scenarios up to the year 2010: the individualisation of sports services, the duality of sports services and the new alliance of sports services. Each scenario is described as it progresses, tracing the outlines of employment in sport (form, volume, etc.), as well as the strategies of the various political and institutional operators.

The final part develops a series of recommendations based on the “new alliance” scenario, which we consider presents the brightest future for employment in sport. These recommendations are formulated in terms of principles to serve as the basis for actions. They relate to 1) the organisation of relations between the various operators involved in the development of sport, 2) the paths for the professionalisation of the associative sector, 3) the improvement of the quality of employment in sport and 4) the optimisation of the relationship between training and employment in the sports sector.

I- SUPPLY AND DEMAND FOR SPORTING ACTIVITIES IN EUROPE

I-1. DEFINITIONS. SPORT AS AN ECONOMIC ACTIVITY: THE SPORTS-RELATED SECTORS AND THE SPORTS SECTOR

Figure 1 presents the economic activities necessary to or generated by the practice of sports corresponding to the classification chosen by the European Observatory of Employment in Sport (OEEES) after international cooperation on the satellite European classification systems for sporting activities.

Fig. 1 : The sports-related sectors, central activities, peripheral activities



- ◆ **"Sport as an economic activity"** ("hard core" also called the **"sports sector"**) is confined to the **services activities** which are related directly to practising sports, i.e. the making available of facilities or equipment and supervision of sporting activities (the services of the sports associations are clearly included in this category). This corresponds to NACE group 92.6³, the only class where sport is isolated in the official classification systems. The activities under class 92.6 are not homogenous (presence of

³ Statistical classification of economic activities in the European Community
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sports associations, commercial sports services enterprises, own-account professional sportsmen) ;

- ◆ the “upstream” and “downstream” activities (corresponding to the sports-related sectors) are referred to as **sports-related economic activities**. For example, physical education clearly appears as an educational activity which may be related to sport depending on the various countries and to differing degrees. These classes are naturally far more diversified than the first, since they group together industry, trade, education, transport, etc.).

I-2- SPORTING ACTIVITIES (THE SPORTS SECTOR)

According to the official statistics, they include both the operation of facilities and the supervision, organisation and promotion of sport. Within this large category, we draw a distinction between four sub-groups:

- ◆ **professional sport or sport as entertainment** is a form of activity which has developed a great deal over the past twenty years. The media are undoubtedly largely responsible for this development. Sport for them has become a "loss leader" which has now become indispensable to them. The importance of this activity can be measured by observing the number of spectators or television viewers it draws in the various European Union Member States. The surveys converge to show that over 70% of the population attended a sports event live or watched it on television in the last quarter⁴. The scale of broadcasting rights is a second interesting indicator. These double in volume every 5 years⁵. These transformations are reflected in changes in the organisations which run or arrange sports events for entertainment. The sports entertainment enterprises are becoming increasingly commercial and appear less and less in associative form. The trend is more towards their integration in international financial groups.
- ◆ **"Championship sport"** corresponds to the tradition of the associative sports movement. The diversification of the forms of sport makes it difficult to measure. It is based mainly on the activities of over 800 000 sports clubs (table 1). The Compas project, which is currently being carried out, gives us a few indications of the share of championship sport

⁴ Data for the Netherlands, France, Italy, Austria

⁵ Andreff W. (1997), *Economie du sport*, P.U.F.

of all sport. For the countries for which we have data, the mean is around 8% (table 2), with very significant differences between the countries (from 4% in Spain and Italy to nearly 17% in the Netherlands). As far as it is possible to draw conclusions on the trends in this form of sport from the membership figures of the sports federations, it appears that since 1990 numbers have stagnated and even declined in some countries. In the European Union as a whole, football is the activity most practised in championships, accounting for nearly 20% of the complement.

Table 1: Sports clubs in Europe

France	Greece	UK	Germany	Lux.	Italy	Belgium	Austria	Finland	Netherlands
170 000	12 000	160 000	75 000	1404	73 049	22 000	12 200	6 000	23 650

National sources (1997 or 1998)

Table 2: Sportsmen competing in championships

Portugal	Spain	Finland	Ireland	Italy	Netherlands	UK
7%	4%	11%	14.1%	4.1%	16.8%	8.6%

Sources : Compas project - Percentage of the population of between 15 and 74 years of age taking part in sports championships intensively or regularly (+60 hours/year)

- ◆ **"Leisure sport"** is a group of activities which take place partly in associations or commercial companies, but also without any supervision outdoors or in facilities open to the general public. Intensive, regular and occasional forms of practice combined, nearly one European in two participates in this activity. The most popular sports disciplines are swimming, rambling, cycling, gymnastics or fitness and jogging. Here too, the effects are to be seen of cultural differences and the environment of the different countries on this choice of disciplines, although there are a certain number of constants. The moderate growth observed in all the countries of the European Union is accompanied by the same fundamental trends: a marked tendency towards individualisation or personalisation of the activities and the way people engage in them; a tendency towards relocating traditional urban sporting practices ("ecologisation"); a tendency towards using state-of-the-art sports equipment; a tendency towards combining different activities according to a hybridisation process⁶. Nevertheless, it appears that there are several models: a Scandinavian model with a very high number of regular participants (2/3 of the population); an Anglo-Saxon model, with which France must be associated, with about

⁶ J.P. Clement, J. Defrance, C. Pociello (1994), Sport et pouvoirs au XX^{ème} siècle, P.U.G.
European Network of Sport Science Institutes - European Observatory of Employment in Sport - Sept. 1999

1/3 regular participants; a Mediterranean model with a relatively low participation rate (less than a third of the population) and barely 15% regular participants (table 3).

Table 3: Participants in leisure sports (%)

	Portugal	Spain	Finland	Ireland	Italy	Nether-lands	United Kingdom
Intensive	8	7	32.3	10.8	3.1	7.9	12.6
Regular	3	4	27.7	3.3	3.4	5.7	5.7
Irregular	4	10	6	15.2	7.9	24.7	18.6
Occasional	1	6	2.4	20.9	4.9	6.2	20.4
Total	16	27	68.4	50.2	19.3	44.5	57.3

Sources : Compas Project 1998

- ◆ **"Adapted sport"** refers to the use of sport by groups of the population with special difficulties: the elderly, the disabled, the socially excluded, the ethnic minorities. This category of activities, with its aims of social reintegration and return to health, is more clearly identified in the Anglo-Saxon and Scandinavian contexts, where there is no fear of dealing specifically with certain target groups of the population, than in the rest of Europe. The role attributed to sport in social integration could contribute to boosting these activities. At European level, we have very little information on this area of sport bordering on social work and therapy.

I-3- SPORTS-RELATED ACTIVITIES (THE SPORTS-RELATED SECTORS)

While it is difficult to assess the activities coming under the "sports sector" proper, assessing the volume and form of the activities in relation to sport (sports-related sectors) is even more problematic. In fact, the systematic inventory of the activities concerned carried out in the context of a satellite European classification system by the OEES⁷ shows that sport affects nearly all the main sectors of the official classification system (NACE) without it being possible to isolate them in the context of the statistical information available.

We shall confine ourselves here to presenting the most significant groups by the volume of activity they represent (or by the prospects they offer in this field).

- ◆ A first group comprises **the enterprises specialised in the construction of sports facilities, stadiums, gymnasiums, swimming pools, golf links**, etc.⁸ The specialised enterprises only corner a small proportion of the market even though, increasingly, the large building and public works firms, which have the lion's share, incorporate specialised teams (including consultancy bureaus and architects). This market, which developed considerably in the 1960s along with the growth in the practice of sporting activities, was essentially dependent at this time on public procurement. Even though this still remains dominant in the majority of the European Union Member States (table 4), it is increasingly giving way to private operators. The standardisation of equipment meeting the norms of the sports federations is being replaced by a movement of diversification of this equipment integrating the expectations of leisure sports and sports entertainment. In so far as almost all forms of sporting activities presuppose premises which have been constructed or adapted for this purpose,⁹ the renovation and creation of sports facilities and areas is one of the keys to the development of sport.

⁷ For EUROSTAT

⁸ NACE code 45

⁹ Even where these are merely waymarks or rudimentary adaptations

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Table 4: The management of sports facilities in Europe.

Country	France	Italy	Sweden	Finland	Belgium
No of sports facilities	157 000	145 500	27 000	25 000	11 700
% public ownership or operation	90%	58%	75%	85%	/

Sources: national data

- ◆ A second group brings together **the manufacturers of sports equipment and goods and the distribution firms** associated with them.¹⁰ Even though it includes few large enterprises, this market is extremely competitive and totally internationalised (at least as regards manufacture). It is also going through a traditional concentration process in all the markets which have reached maturity. It often calls on the latest technology and its development, increasingly in terms of quality, depends on the development of "self-service" behaviour among sportsmen,¹¹ i.e. the use of equipment which partly replaces human supervision. The data available on certain specific products (sports footwear, skis, etc.) show a moderate growth in this economic sector with a decline in the industries subject to competition from Asia.
- ◆ A third group of activities is that of **the specialised media** (audio-visual -92- and written press -22-). This is a field which is expanding rapidly, as regards both television and the production of specialised magazines which support the activity of sportsmen (over a thousand titles). If this is combined with the entire sector of publishing and production of audio-visual educational material, this group too should experience strong growth in the coming years.

¹⁰ This is a very varied group ranging from the manufacture of means of transport for sporting activities (boats, cycles, cars, etc.) to clothing and footwear via the sports goods proper (skis, balls, etc.) and sports equipment (body-building equipment). These activities are divided between NACE codes 18, 19, 34, 35, 36, 50, 51, 52.

¹¹ In the growing process of "instrumentation" of sporting activities, instruments for control of activity are developing which are being paid increasing attention by the general public (e.g.: sporttester)

- ◆ We must also present the **education and training sector**, which includes physical education at school, at all levels of training and in all types of establishments, and the training of future professionals in the universities or public or private institutes. As regards training, it can be estimated that the number of institutes and universities exceeds 500 within the European Union (employing over 15 000 people) and that they receive over 200 000 people annually as students or professionals receiving ongoing training.
- ◆ Mention must also be made of **the activities of the public sports authorities**. Whether these come under the central government or local or regional authorities, they represent a group which has developed to very varying extents in the different European Union Member States. It is hardly surprising to see that, depending on whether the national traditions are “interventionist” or “liberal”, the public services provided by central government are developing to a greater or lesser extent. France is the country with by far the largest number of government officials within its Ministry of Youth and Sports (table 5). On the other hand, at local or regional authority level, the differences in situation are not so marked. However, it is a sector which is tending to decline almost everywhere.

Table 5: Public officials associated with sport in Europe.

Country	France	UK	Italy
No of people in sports ministries or government agencies	10 000	750	3000
Local authority staff	40 000	40 000	30 000

Sources: national data

- ◆ To conclude, mention is made of the **health sector** and its “enterprises” specialised in sport, whether these are hospitals or sports medical services, physiotherapy practices, rehabilitation centres, etc.

Many more examples could be given without managing to cover all the sports-related structures (for example, transport and accommodation which are predominantly non-sports-related, food for sportsmen, etc.).

II- EMPLOYMENT SITUATION IN THE SPORTS SECTOR AND THE SPORTS-RELATED SECTORS IN EUROPE

It is feasible to draw up a rigorous, exhaustive comparison of employment associated with sports activities and sports-related activities in the various EU Member States provided that comparable national data are available. In fact, for the time being, the European official statistics (and especially the EUROSTAT employment survey) are not sufficiently precise to tackle the question of employment in sport. We have therefore had recourse to two types of information:

- ◆ that coming from national statistics institutes (employment surveys, micro-census, etc.) which allows the pool of employment in the economic sector (NACE group: 92.6) to be identified. The data collection which we carried out in a harmonised fashion for the first time in Europe, allows the foundations to be laid for serious comparison of the sports sector;
- ◆ that coming from surveys or studies carried out, often at different levels (regional or national) and sometimes concerning certain sub-sectors (for example, employment in the fitness or mountain sports sectors) or some of the sports-related sectors (for example, sports goods industry, trade in sports goods). This second type of information is derived from different methods and definitions in each country and institute engaging in such surveys and studies, which does not always allow international comparison. However their degree of accuracy is often of great interest and enables the excessively aggregated data of the official statistics to be supplemented (even though this is not always possible for all the 15 European Union Member States).

This part therefore contains a presentation of the employment situation in the sports sector in Europe (II-1), followed by its main characteristics, which we clarify on the basis of less harmonised data on the sports sector and sports-related sectors (II-2). The “sectoral” approach is then supplemented by an approach by occupation (II-3), and finally (II-4) we finish up by taking stock of the employment policies in the sports field in Europe.

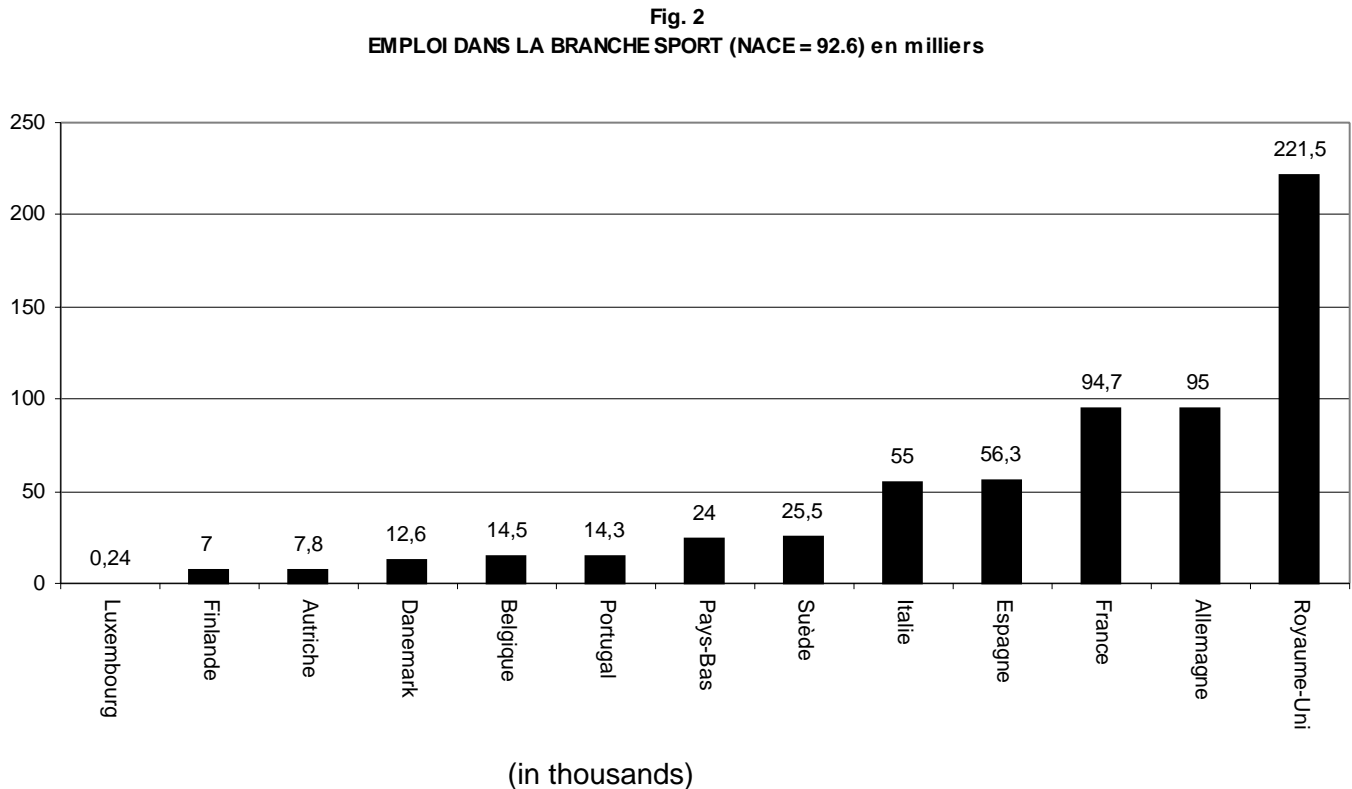
II-1- EMPLOYMENT SITUATION IN THE SPORTS SECTOR IN EUROPE

II-1-1- Employment in the sports sector in Europe: total job numbers and trend

The sports sector (**NACE group 92.6**) accounts for a total of some **700 000 jobs** in the 15 European Union Member States (fig. 2). These jobs are main occupations but are not always full-time. All categories of occupation exercised in the sports sector are also considered here. The United Kingdom alone accounts for 35% of aggregate employment in the sector; it is followed by France and Germany with 15% each.

Fig. 2

1998 - EMPLOYMENT IN THE SPORTS SECTOR (NACE 92.6)



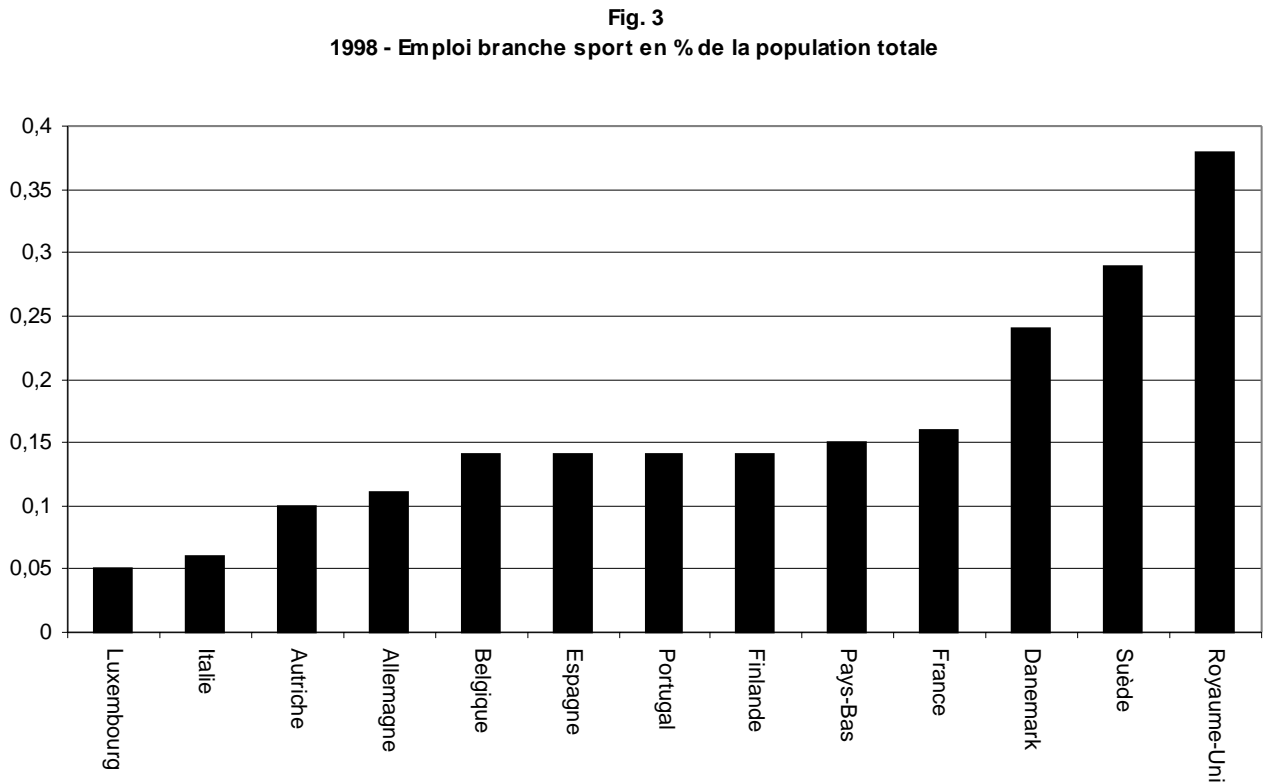
There are obviously **very significant differences in volume to be found according to the countries** considered. However, related to their relative size (fig. 3 + table in Annex), it can also be seen that employment in the sector accounts for between 0.05% (Luxembourg) and 0.38% (United Kingdom) of the total population. Similarly, in terms of the proportion of

aggregate employment, there are significant disparities between the countries: from 0.14% to 0.85% for the same countries. Three main groups can be defined:

- ◆ the countries with a high rate of employment (United Kingdom, Sweden, Denmark);
- ◆ the countries with a “medium” rate (France, the Netherlands, Finland, Portugal, Spain, Belgium);
- ◆ the countries with a “low” rate: (Germany, Austria, Italy, Luxembourg).

Fig. 3

1998 - EMPLOYMENT IN THE SPORTS SECTOR (% OF TOTAL POPULATION)



II-1-2- Trend in the total volume

It is hard to estimate the aggregate growth of the sector in view of the different national trends in the methods used to classify statistical information. However, it can be seen that in the past ten years, the aggregate volume of employment has grown by about 60%, again with very distinct differences depending on the country (Table 6). For example, whilst numbers doubled in Spain and the United Kingdom, they remained stable and even fell slightly in Austria, Finland and Sweden.

Table 6: Growth in employment in the sports sector (1990-1998)

<i>Country</i>	<i>Job numbers 1990</i>	<i>Job numbers 1998</i>	<i>Growth 90-98</i>
<i>Austria</i>	9378	7790	-17%**
<i>Finland</i>	7516	6967	-7%**
<i>Sweden</i>	25414	25469	0%**
<i>Italy</i>	48742	54978	13%
<i>Denmark</i>	10796	12582	17%
<i>Luxembourg</i>	190	241	27%
<i>Netherlands</i>	18000	24000	33%
<i>Portugal</i>	9600	14300	49%
<i>France</i>	61854	94747	53%
<i>Belgium</i>	9210	14524	58%
<i>Spain</i>	28200	56300	100%
<i>United Kingdom</i>	110748	221449	100%
<i>Germany</i>	/	95000	/
<i>TOTAL</i>	339648	628347	57%*

* without Germany

** **NB:** Austria, Finland and Sweden appear in this table to be declining slightly. This is partly attributable to methodological problems (changes in classification of activities during the period examined). In Austria, for example, the same analysis carried out between 1981 and 1991 (strictly comparable classification systems) shows 57% growth in employment, which is entirely comparable to the European mean.

II-2- CHARACTERISTICS OF EMPLOYMENT IN THE SPORTS SECTOR IN EUROPE

With the current state of the statistics available on the sports sector, it is still very difficult to analyse all the 15 European Union Member States in a harmonised manner. The range of data below is at times incomplete, but it does provide information on the main characteristics of and the trend in employment.

II-2-1- Part-time employment in the sports sector

Even though we do not have data available for all the countries, it can be seen that in the majority, the percentage of part-time work is distinctly higher in the sports sector than in aggregate employment (table 7). The percentage of part-time work of aggregate employment in Europe was 13.5% in 1990 and 16.4% in 1998, whilst in the sports sector, the figures were 42.7% in 1990 and 34.2% in 1998. The decline on average is in fact the result of conflicting situations: rise in most countries and a fall in Portugal, Finland and the United Kingdom,¹² where the numbers are sufficient to determine the trend.

Table 7: Percentage of part-time employment (sports sector and aggregate employment) in the European Union Member States.

<i>Country</i>	<i>Part-time jobs 1990</i>		<i>Part-time jobs 1998</i>	
	<i>No of jobs</i>	<i>%</i>	<i>No of jobs</i>	<i>%</i>
Portugal	1900	19.8	2500	17.5
Netherlands	7000	38.9	11000	45.8
Luxembourg	50	26.3	70	29.0
Germany*	/	/	42500	44.7
Finland**	1400	18.6	1200	17.2
Sweden**	/	/	9400	37.0
Belgium	1200	13.0	3200	22.0
Spain	4900	17.4	13300	23.6
Italy	/	/	1900	3.5
France	14400	23.3	27100	28.6
United Kingdom	74000	67.0	95700	43.2
European mean Part-time (% employment in sport)	104850 / 245318	42.7%	207870 / 607975	34.2%
Part-time in Europe (% aggregate employment)	13.5 %		16.4%	

/ : lack of data

* West Germany; ** % of part-time employment in recreational, cultural and sporting activities (NACE division 92)

Recent comparative research¹³ has in fact shown that in France and the United Kingdom, the percentage of people employed part-time is significantly higher in the sports sector than in the other sectors. This situation derives from structural characteristics of the job supply (small structures with limited activity or concentrated over certain hours of the day)

¹² The fall in the mean undoubtedly stems from the significant fall in the United Kingdom (from 67% to 43.2%) . Taking a longer period into account (1980-1998), this in fact corresponds to a general upwards trend (33.9% in 1980 to 43.2% in 1996).

¹³ LE ROUX N. (1998), : Analyse Comparée de l'Emploi dans les Services Sportifs en France et au Royaume Uni: Formes Institutionnelles et Emploi, Thèse de Doctorat, Université Claude Bernard Lyon 1.

and the job-seekers (specialists with narrow skills). However, beyond the structural differences, it is also interesting that the percentage of part-time jobs is not homogenous when country comparisons are made (from 3.5% in Italy to 45.8% in the Netherlands).

II-2-2- Young people and employment in the sports sector in Europe

The proportion of young people of under 25 years of age in the sports sector in Europe is relatively low (around 20%) (table 8). The relative stability in the share of young people is mainly attributable to the countries of southern Europe (Portugal and France, but also Finland), where the proportion of young people is tending to fall. This may reflect the strategy adopted in the countries of southern Europe to combat youth unemployment, which consists in prolonging their training. It is here that comparative analysis is of interest as, although young people are not in a better position than adults with regard to employment in any European country, the divergences found between the countries suggest that the various institutional strategies adopted have a direct impact on the distribution of the working population by age group. In France, it was shown that the main cause of the decline in youth employment was training (Galland, 1998). In fact, in France, as in Belgium and the Mediterranean countries, an internal employment market prevails from which young people remain excluded for a long time (or hold insecure jobs). The strategies of the young people, but also the public authorities, consequently are to promote a detour towards training. Whereas in the United Kingdom (and the Netherlands) young people end their studies very early without for all that benefiting from schemes combining training and work (as is the case in Germany), they are penalised less as regards access to employment than in France. On the other hand, they are undoubtedly penalised more as regards their working conditions, which seems to be confirmed in the analysis of the percentage of part-time work (in the United Kingdom and the Netherlands, the percentage of part-time work exceeds 40%).

Table 8: Under 25 year-olds in the sports sector in the European Union Member States

<i>Country</i>	<i>Under 25 year-olds 1990</i>		<i>Under 25 year-olds 1998</i>	
	<i>Numbers</i>	<i>%</i>	<i>Numbers</i>	<i>%</i>
<i>France</i>	8100	13.1	9600	10.1
<i>United Kingdom</i>	30200	27.3	75400	34.0
<i>Belgium</i>	1000	10.8	1800	12.4
<i>Portugal</i>	4000	41.7	2700	18.9
<i>Netherlands</i>	3000	16.7	5000	20.8
<i>Finland*</i>	1701	22.6	1014	14.6
<i>Sweden*</i>	/	/	4300	16.8
<i>Germany**</i>	/	/	7500	7.9
<i>European mean % employment in sport</i>	47600 / 216928	21.9%	107700 / 496456	21.7%

* % employment in recreational, cultural and sporting activities

** West Germany only

II-2-3- Women and employment in the sports sector in Europe

Contrary to the preconceived ideas on the sector (which claim that it is more male-dominated than the others), the sports sector does not seem to show any strong particularity with regard to the presence of women (table 9). However, a more rapid aggregate trend can be seen towards increasing the proportion of women than in aggregate employment. Here too, there are significant national disparities between the countries of the north and those of the south of the European Union.

Table 9: Women in the sports sector in the European Union Member States

<i>Country</i>	<i>Women 1990</i>		<i>Women 1998</i>	
	<i>Numbers</i>	<i>%</i>	<i>Numbers</i>	<i>%</i>
<i>France</i>	25600	41.4	36200	38.2
<i>United Kingdom</i>	51900	46.9	107000	48.3
<i>Spain</i>	7900	28.0	19400	34.5
<i>Italy</i>	11800	24.2	/	/
<i>Austria</i>	/	/	3400	44.0
<i>Portugal</i>	3100	32.3	5800	40.6
<i>Netherlands</i>	8000	44.4	11000	45.8
<i>Finland*</i>	/	/	3800	54.8
<i>Sweden*</i>	/	/	12100	47.5
<i>Germany**</i>	/	/	42500	44.7
<i>Luxembourg</i>	80	42.1	100	41.5
<i>European mean % employment in sport</i>	108380 / 277334	39.1%	241300 / 546263	44.2 %
EUROPEAN MEAN (% of aggregate employment)	39.7 %		41.7 %	

* % of employment in recreational, cultural and sporting activities

** West Germany only

II-2-4- Self-employed work in the sports sector in Europe.

The proportion of self-employed workers in the sports sector (table 10), which is slightly higher than the mean for employment in Europe in 1990, is tending to fall. The situation in Belgium, the Netherlands, Italy and Sweden seems to differ from that in the other countries.

Table 10: Self-employed workers in the sports sector in the European Union Member States

<i>Country</i>	<i>Self-employed workers 1990</i>		<i>Self-employed workers 1998</i>	
	<i>Numbers</i>	<i>%</i>	<i>Numbers</i>	<i>%</i>
<i>France</i>	/	/	13200	14.0
<i>United Kingdom</i>	/	/	27000	12.2
<i>Spain</i>	2400	8.5	9700	17.2
<i>Italy</i>	15400	31.6	/	
<i>Belgium</i>	1392	15.1	3617	24.9
<i>Austria</i>	1500	16.0	1200	15.4
<i>Portugal</i>	700	7.3	900	6.3
<i>Netherlands</i>	4000	22.2	4000	16.7
<i>Finland*</i>	800	10.6	1200	17.2
<i>Sweden*</i>	/	/	4500	17.7
<i>Germany**</i>	/	/	18700	19.7%
<i>European mean in sport</i>	26192 / 130646	20.0 %	84017 / 560 546	15.0 %
EUROPEAN MEAN (% of aggregate employment)	15.3		15.0	

* % of employment in recreational, cultural and sporting activities

** West Germany only

Self-employed work seems to have been particularly well developed in the sports sector in the early 1990s, although it is now declining towards the European mean for all sectors together. However, there is a need for caution as we do not have data for the United Kingdom, France and Germany in 1990.

II-2-5- Unpaid workers and professionals

The relationship between unpaid work and remunerated work in the sports sector is often problematic. The real difficulty in measuring the contribution of unpaid work makes it tricky to carry out analyses to assess the potential number of jobs it represents. This type of analyses could in any case prove dangerous for the associative sector which has developed

and survives thanks to unpaid work. A few interesting ideas can be taken from the large number of studies conducted on this subject. As regards unpaid work, a distinction can be drawn between 3 main groups of countries (Halba, Le Net, 1997):

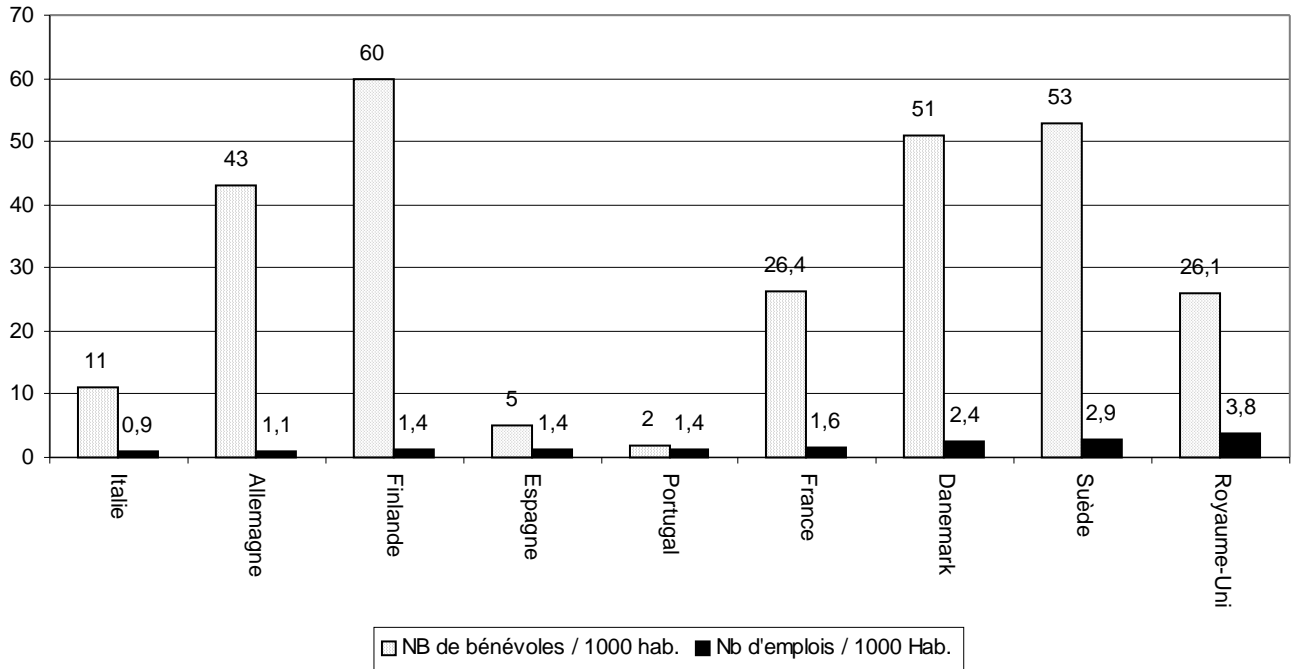
- ◆ the countries with a substantial amount of unpaid work in sport (Scandinavian countries and Switzerland)
- ◆ the countries with an intermediate amount of unpaid work in sport (Germany, Belgium, France and Italy)
- ◆ the countries with a low amount of unpaid work in sport (Spain, United Kingdom, Portugal).

Comparing the existing data on unpaid work and that we gathered on employment, the question arises as to whether it is possible to observe competition or complementarity between unpaid work in sport and employment. Figure 4 shows that it does not seem possible to derive any precise rule:

- ◆ the countries with a substantial amount of unpaid work in sport are also among those where employment is the most highly developed (Sweden, Denmark);
- ◆ this is not always true (Finland, Germany);
- ◆ conversely, countries with little unpaid work are not necessarily particularly well supplied with jobs (Spain, Portugal).

Fig. 4
EMPLOYMENT AND UNPAID WORK
IN THE SPORTS SECTOR

Fig. 4 EMPLOI ET BENEVOLAT DANS LA BRANCHE SPORT



No of unpaid workers/1000 inhabitants No of jobs/1000 inhabitants

II-2-6- Other characteristics of employment in sport

- ◆ **The seasonal nature of the activities** is also a very important dimension in the structure of employment in sport, especially where it is linked to tourist activities. We do not have data available to analyse this dimension.
- ◆ Certain professions in sport correspond to a **short career** (this is the case in particular for 30 000 to 40 000 professional sportsmen). Here too, no data are available to measure the length of careers in sports.

II-2-7- Additional information on the sector

On the basis of supplementary information available in each of the countries, it is possible to estimate the structure of employment within the sports sector more precisely.

- ◆ **Professional sport or sport for entertainment**

The strong growth in this sector does not imply an increase in the number of comparable jobs. It corresponds more to an increase in pay, especially in the part reserved to top players. Football occupies a special place among professional sports. It alone accounts for nearly half the jobs in professional sport, players and supervisors, which can be estimated at **50 000** people, of whom 15 000 to 20 000 are professional sportsmen.

◆ **Championship sport**

Even though it is difficult to evaluate the exact share of championship sport in all the activities of the sports clubs, the number of jobs it generates can be estimated at around **150 000**, without counting the millions of unpaid workers it draws.

◆ **“Leisure sport”**

The number of people employed in leisure sports as a main occupation in the European Union can be estimated at about **500 000**.

◆ **“Adapted sport”**

The number of people working in adapted sport, principally in associations or public services, is estimated at between **50 000 and 100 000**. They are rarely shown in the breakdown of the sector.

II-2-8- Additional information on the sports-related sectors

In view of the weakness of the official statistics concerning the “sports-related sectors”, we are only able to present estimates here based on national analyses or studies which do not always use the same definitions (table 11).

Table 11: Estimates of the number of people employed in sports-related sectors in Europe

enterprises specialised in the construction of sports facilities, stadiums, gymnasiums, swimming pools, golf links, etc.	50 000
--	--------

manufacturers of sports equipment and goods and distribution firms	200 000
the specialised media	30 000
the education and training sector (including physical education)	400 000 (including PE)
public sports administration (central government or local and regional authorities)	200 000
the health sector and its "enterprises" specialised in sport.	10 000

By incorporating other sub-groups (specialised transport, special food, etc.), a total of nearly a million people depend on the sports phenomenon or contribute to its development. If the some 700 000 people listed in the sports sector are added, this gives an estimate of 1.5 million to 2 million people working for sport in Europe.

II-3- THE ORGANISATION OF WORK AND THE PROFESSIONS

II-3-1- Definitions: sport as a profession

To speak of "sports professions " or "sports-related professions" involves showing the "organised" part of the labour force used for sporting activities (Camy, Le Roux, 1998). The human labour necessary for sporting activities is recognised to varying degrees in terms of specific skills, particular functions, up to the identification of veritable "trade associations". As a general rule, a "profession" is considered to exist where it is attributed social recognition, which involves criteria such as: the existence of a professional organisation of its own (trade union or professional organisation); the existence of one or more specific training courses; the existence of a form of legal recognition (official title, collective agreement mentioning it, etc.).

In the field of sport, there are not only bodies set up long ago (mountain guides, ski instructors, golf instructors, etc.), but also other bodies in the process of being set up (trainers, for example). Moreover, even for the best established professional bodies, the national or local conditions for building and recognising skills vary enormously. The professional identities of these "bodies" derive from the often different historic conditions in which their characteristic services became established. The skills required or the know-how recognised are consequently directly dependent on them. For example, the French life-savers have become "maîtres nageurs sauveteurs" (swimming instructors and life-savers), which indissolubly links teaching skills, surveillance and rescue, in contrast to the majority of their European counterparts. Likewise, the concept of the profession of mountain guide as practised in the Alpine and Pyrenean companies differs from the concept which depends far more on an exclusive itinerary to be found in certain countries of North Africa or North America.

Hence, confronted by the diversification of ways of practising and consuming sport in recent years, it can be considered that the professional field associated with sport has extended considerably. It is still true that the amount of skill in the sport necessary to engage in these professions varies considerably depending on the economic sector. For example, clearly industrialists and builders only give greater importance to skill at sport for predominantly commercial jobs.

Just as for the sports activities, we propose to present here the choice made by the European Observatory of Employment in Sport.

- ◆ Respecting the principles of the International Classification of Occupations (ISCO 88, International Labour Office),¹⁴ the group **sport professions** includes all persons who engage in a sporting activity for remuneration (professional sportsmen) and those who supervise this activity directly. Under this classification, the "basic group" 3475, entitled "Athletes, sportspersons and related associate professionals" belongs to the "main group" of the intermediate professions. Knowledge of the theory and practice of sport and their application is the basic skill of the "sports professions" belonging to this group. It in fact covers five main types of functions:¹⁵
 - ◆ "**professional sportspersons**", participating in a limited number of sports and in general depending on the sporting events which constitute their livelihood;
 - ◆ "**sports officials**", i.e. all those who, as referees, judges or timekeepers directly supervise the conduct of sporting competitions;
 - ◆ "**sports activity leaders**", who use sport as a means of getting specific groups of the population (elderly people, the disabled, young people, etc.) involved in team activities;
 - ◆ "**sports instructors**", who teach one or more specific sporting activities to groups of the population who learn from scratch or wish to develop their abilities;
 - ◆ "**sports coaches**" responsible for preparing and guiding systematic performance in a given sport.

- ◆ There is also a full range of professions which, although they belong to other large occupational groups, require a high level of specific skills in the field of sport. As for the sports-related activities, the OEES has tried to give as exhaustive a list as possible of these professionals who, to be identified as engaging in a "**sports-related profession**", must show certain characteristics of institutionalisation (professional trade unions, specific training, recognised designations, etc.).

¹⁴ International Classification of Occupations (ISCO 88, International Labour Office)

¹⁵ According to the proposal of the OEES, cf. LE ROUX N., CAMY J. (1997), *Nomenclature Européenne des Professions du Sport et en Relation avec le Sport*, Edition du R.E.I.S.S. / O.E.P.S., Barcelona, 90 p.
European Network of Sport Science Institutes - European Observatory of Employment in Sport - Sept. 1999

Classified in the order of CITP 88, are listed:

- ◆ **professional managers** of sports or sports-related organisations;
 - ◆ **sports doctors**;
 - ◆ **physical education and sports teachers** in the school environment;
 - ◆ **sports journalists** and other specialists in communication through or on sport;
 - ◆ **physiotherapists specialised** in sport;
 - ◆ **agents or promoters of events or professional sportspersons**;
 - ◆ **sellers of sports goods**;
 - ◆ **caretakers of sports facilities** and other reception staff;
 - ◆ **maintenance workers** of sports facilities.
- ◆ Finally, the two large groups of professionals we have just described are not the only ones present within the sports and sports-related sectors. A large number of people who work there come under **other occupational categories which are not specific** (or specified) through the enterprise they belong to. Moreover, some sports professionals work outside the sports sector (in France, nearly half of them work in the public administration).

II-3-2- Difficulties in counting the professionals in sports and sports-related fields

The European directives on the free movement of professionals define a profession as such as soon as it is exercised for remuneration. This legal definition seems very simple and could solve our problems of definition and above all of measurement.

However, in the field of sport, it is not easy to apply. In fact, it is not unusual to meet individuals engaging in several activities, whether paid or unpaid, in relation sometimes to several employers. It then becomes hard to consider which is the main occupation engaged in by this person, as a variety of criteria have to be taken into account. For example, is it necessary to take account of the time spent on a particular activity or the remuneration received? These two criteria may not reflect the reality of the situation. In fact, it is possible that an activity seen as "complementary" by an individual proves to be the main source of his income or the activity on which he spends the most time, even if it is not strictly speaking his "profession".

These aspects show one of the problems facing us as soon as we refer to sports occupations, i.e. that of the nature of the work carried out in an entirely atypical sector. There has sometimes been some question of analysing the trends in employment in the

sports sector by comparing it with the dominant trends found in employment in general, and especially of placing the development of these occupations in a well-known general movement of greater insecurity and flexibility of labour. Like the entertainment professions, it can undoubtedly be considered that, through the very nature of the service demanded, part of employment in the sports sector includes a large proportion of “insecure” or unstable jobs (seasonal in particular) which could not be analysed by referring to the dominant model of salaried employment.

The field of sport offers such a diversity of forms of employment that a rigorous estimate taking account of its specific nature is extremely complex: in fact, an analysis of employment in the sports sector cannot disregard the importance of the work by non-professionals (unpaid volunteers); moreover, within the sub-group “paid work”, the co-existence of employees of the public authorities or businesses and self-employed workers raises the question of drawing a distinction between labour markets which do not function according to the same rules. Finally, there is a form of labour which should not be overlooked, “undeclared employment” or “moonlighting” which is particularly highly developed in the sports sector. Not included in the statistics by definition, it would however be wrong to ignore it, considering that this form of work may also be in competition with salaried employment, and especially as its presence on the one hand shows the total activity generated by the sector and on the other certain problems in the allocation of work. The attempts at “quantifying” sports and sports-related professionals always come up against problems of taking “borderline cases” into account, which are cut off from the official statistics.

All these factors show how complex it can be to carry out an inventory of sports professionals, especially where this inventory has to be at European level where the national cultures have led to professional identities being established which differ from country to country. We have nevertheless made an estimate of the number of people in each of the occupational categories we listed on the basis of the data available in some countries (national or regional sub-sector surveys).

II-3-3- European estimates by occupation:

SPORTS PROFESSIONS	
"professional sportspersons"	15 000 to 20 000
"sports officials"	1 000
"sports activity leaders"	50 000
"sports instructors"	350 000
"sports coaches"	50 000
SPORTS-RELATED PROFESSIONS	
professional managers of sports or sports-related organisations	50 000
sports doctors	5 000
physical education and sports teachers in the school environment	300 000
sports journalists and other specialists in communication through or on sport	20 000
physiotherapists specialised in sport	3 000
agents or promoters of events or professional sportspersons	5 000
sellers of sports goods	50 000
caretakers of sports facilities and other reception staff	150 000
maintenance workers of sports facilities	150 000

II-3-4 The occupational structure of the sports sector in Europe.

It is of interest to compare the share of employment in sport accounted for by the occupations which are "managerial", "technical" or "service support" (reception, maintenance, etc.) in the various European Union Member States. A first comparison made between France and the United Kingdom showed that the professional structure of the sector revealed not only different forms of organisation of work, but also the institutional choices made in each of the two countries. In France, a concentration of jobs in the sports technicians category reflects the French training system, which has traditionally concentrated on technical skills (training for State diplomas), whereas the presence of a higher number of managers in the United Kingdom could be the sign of overall professionalisation of the sector taking place at an earlier stage in this country (table 12). This extended analysis of the countries on which we have data showed the small share occupied by managerial functions in employment in the sports sector (under 10%).

Table 12: Occupational structure of the sports sector in Europe.

Country	Managers	Other	
		Professional technicians	Employees, manual workers
United Kingdom	21.3	20.4	58.3
France	13.7	39.5	46.8
Netherlands	12.5	37.5	45.8
Belgium	9.8	52.1	38.1
Finland	7.9	11.6	80.5
Portugal	5.6	35.0	59.4

II-4- POLICIES FOR EMPLOYMENT IN SPORT

II-4-1- Training facilities for professions in sport

In all the European Union Member States, there are four types of operators providing training for professions in sport with different importance given to each depending on the country:

- ◆ The universities, or more broadly the higher education establishments, have for a long time shown little interest in strengthening the relationship between training and employment, and this is still the case in certain countries. This is reflected in a sometimes very low percentage of graduates in the sports and physical education sector (as in Belgium, for example) and even quite a high level of unemployment amongst such graduates (as in the south of Italy, for example). We sometimes also find a certain distrust on the part of employers in the sports sector in relation to these graduates whose qualifications are seen as both too high and ill-suited to the jobs on offer.
- ◆ The sports organisations (federations, confederations, Olympic committees, etc.) offer training in sports occupations almost everywhere. These are essentially oriented towards sports activity leadership or coaching. Apart from in a few countries like Italy or Germany, the existing facilities often have limited capacity and mainly concentrate on training unpaid volunteers.
- ◆ The sports ministries (or departments) also offer training for the future sports professionals. Depending on the country, this training is crucial in relation to the employment market (as in France) or relatively marginal.
- ◆ Finally, we place in a final category the training facilities depending on professional organisations, trade associations, bodies intended to meet the needs of an occupational sector, which generally act with recognition from the public authorities (for example, SPRITO in the United Kingdom).

Without being able to present perfectly reliable data,¹⁶ the information available to us on the integration of graduates shows that the adjustment between training and employment is a very weak link in the chain of employment in sport in almost all European countries.

This phenomenon derives from both failure to align the content of training with the professional skills expected and a failure to adapt the training arrangements to the conditions

¹⁶ survey in progress in 5 countries (Italy, France, United Kingdom, Germany, Belgium)

of access to employment in a world of very small undertakings. The research conducted in this field in several European countries in fact shows that access to stable employment in this type of undertaking involves a long process of integration into the specific "culture" and the relations which develop there. Only schemes combining training and work can meet this objective.

II-4-2- Access to employment in sport

The way in which the European Community defined the "regulated professions"¹⁷ would give grounds for considering that the "sports professions", or at least those which relate to the supervision of sporting activities (teaching, training, activity leadership), are in part regulated within the European Union Member States.

- ◆ Some countries opted to regulate all or some of these occupations by means of laws, regulations or administrative provisions. France is a prime example, since it regulates all the supervisory activities exercised professionally and in this case requires a diploma to be awarded or recognised by the State (in this case the Ministry of Youth and Sport). However, other European countries also regulate access to certain occupations by law. This is the case, for example, for coaches and shortly for managers in Greece.
- ◆ In the majority of countries, it is not the legal texts which regulate the conditions of access to the sports professions directly, but "trade associations" or employers' organisations. This situation can be illustrated by the example of ski instructors in certain regions of northern Italy.
- ◆ If an attempt is made to draw up an overall inventory, the majority of sports professions are not strictly speaking regulated. Nevertheless, standards are applied, certificates are awarded which lead to de facto control of access to the sports professions. Even though Italy does not regulate access to the profession of coach, it is hard to engage in such an activity without a diploma awarded by the corresponding federation. Conversely, it can be found that even in the countries where regulations apply, a large proportion of professionals do not meet the legal requirements (case of France - INSEP study, M. Leblanc).

¹⁷ Directive 89/48/EEC and Directive 92/51/EEC
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II-4-3- Arrangements for the recognition of qualifications

The question of defining professional qualifications and their recognition poses the problem of both the legitimate operators involved in the matter and the proposed content.

In almost all the European Union Member States, the social partners are responsible for the definition and recognition of occupational qualifications under a process initiated, guided or endorsed by the Ministry of Labour and Employment. The situation in the sports sector is more complex in so far as very few countries have an effective social partnership in this sector.

It is therefore often public authorities, private bodies or trade associations which have attempted to define, nationally or internationally, the qualifications required (case of regulated professions) or desired. This approach can be illustrated by the production of a European platform for guides, for example, with this work serving as a common reference for all the Alpine States. Similarly, the five-level qualifications structure for coaches, drawn up within the REISS, brought about reforms in training in several European Union Member States.

We nevertheless see that the tendency to include the qualifications relating to the sports occupations in the "ordinary law" governing professional qualifications is developing. The work carried out in the United Kingdom in the context of NVQs/SVQs is a prime example of this.

As regards content, it should be stressed that the trend is towards using the concept of skills and analysis based on professional situations and knowledge/know-how to be drawn on to define the qualifications. The diploma appears as a result of the approach defined in this way. The work conducted in the United Kingdom, Ireland, France and the Netherlands comes under this perspective.

II-4-4- Policies to promote the development of employment in sport

For several years, voluntarist policies to promote employment have been implemented in the European Union Member States. Sport, like other personal community services sectors, is considered as a source of new jobs. Without claiming to draw up an exhaustive inventory, we shall examine a few initiatives taken at regional and national levels.

We shall start from the guidelines given at the European Council of Luxembourg in 1995 to classify these initiatives.

1- Employability:

- ◆ Prevention of youth unemployment and long-term unemployment applies in the sports sector in several European Union Member States. We shall focus in particular on the Finnish programme "sport provides work and quality of life", which targets young people or the long-term unemployed and offers them an undertaking to pay expenses for a maximum of 12 months. The French "youth employment" programme is very widely used in the associative sports sector. On the basis of a development project presented by the association or the public service, a 5-year contract is offered, which is 80% financed by the government on the basis of the guaranteed minimum wage, to young job-seekers under 25 years of age.
- ◆ The move from passive to active employment policies is another dimension, which is less specifically present in the sports sector. Nevertheless, the widespread idea that sport would provide an opportunity for "social reintegration" for persons excluded from society should allow envisaging its use as a means of facilitating the move from a situation of assistance to one of activity.
- ◆ To facilitate the transition between school and work: we mentioned above that the sports sector is lagging behind almost universally in this respect. It should nevertheless be pointed out that schemes combining training and work and apprenticeships are developing increasingly and are even emerging as the key components of training (for example, in France).

- ◆ To promote partnership for ongoing training: here too, the sports sector is not particularly advanced. Mention can be made of the scheme set up in the United Kingdom and Ireland based on units which can be capitalised and negotiated with the social partners (NVQs/SVQs / SPRITO)

2- Entrepreneurship

- ◆ To promote self-employed work: this is largely present in the sports sector (see part II). We have not found any trace of programmes developed on any scale in this field.
- ◆ To explore the job creation potential in the new services, the social economy and at local level. Sport comes under the ILDE programme and certain local initiatives, limited in number, are conducted in this context. Mention should also be made here of the "sports profession" scheme (France) which allows job offers from several structures to be grouped together to form a full-time job.
- ◆ To obtain changes in social security contributions towards a system which is more favourable to employment. Several European Union Member States have developed programmes under which employees of the associative sports sector are exempted from social security contributions or are only subject to reduced contributions (provided the sums paid do not exceed a certain threshold). The aim is also to put an end to the very widespread practice of "undeclared employment" (France, for example).

3- Adaptability:

- ◆ We have already mentioned above that it is probably in this field that the sports sector is lagging furthest behind because sport is not an economic activity like any other. Nevertheless, very considerable progress has been made to build relations between social partners, according to the traditions specific to each country (approaches giving greater or lesser importance to sectoral agreements or company agreements. The Netherlands and the United Kingdom have already set up a framework for this. In France, a collective agreement is being negotiated for the sports sector.
- ◆ To modernise labour legislation: there is nothing to report in this field. The introduction of a social partnership will no doubt provide the opportunity to negotiate agreements taking

account of the specific working conditions in the sports sector. In particular, everything relating the maximum working hours per week, Sunday work and part-time work should be taken into account, whilst respecting the interests of both employees and entrepreneurs.

- ◆ To boost on-the-job training: this field is also sparse in initiatives compared to other sectors. This is primarily attributable to the very small size of the enterprises in the sector. The very rapid development of activities and the skills required nevertheless creates a significant need in this field and public or private initiatives intended to facilitate access to ongoing training of employees and unpaid volunteers should be taken.

4- Equal opportunities:

- ◆ To reduce the gap between men and women: we have seen that the proportion of women employed in relation to men is higher than that observed in all the other sectors in the European Union Member States. Nevertheless, significant divergences exist between the southern and northern European countries. It tends to be among the unpaid volunteers and still more among the leaders of the sports movement that the sector is lagging the furthest behind.
- ◆ To combine family and professional life: nothing specific has been done in the sports sector to deal with this issue. It can be considered that here too, the development of a social partnership will allow it to be taken into account.
- ◆ To facilitate the return to working life: it is possibly in this context that the problem could be raised of the vocational retraining of top-level sportsmen. In this field, the initiatives taken by the European Union Member States do not measure up to the problem which arises, especially for all those who have not become famous, even though their sporting activity occupies them full-time.

- ◆ To promote the integration of disabled people: we do not have any data available to estimate the proportion of disabled people working in the sports sector or on the measures taken in the European Union Member States to deal with this problem. Although growing attention is focused on sports for the disabled, their vocational integration seems to be marginal.

III- NATIONAL STRUCTURES

The first work carried out at European level, which aimed to group the countries according to “typical” cases, focused on two aspects: (i) the sports legislation models (ii) the sports financing models. These models quite often bring out contrasts between the countries based on a single criterion: that of the greater or lesser degree of government involvement depending on the country. The frontier pencilled in is that which would separate the countries of northern Europe with a liberal trend and those of the south with an interventionist trend. For our purposes, it seems necessary to specify these models, taking into account a further dimension: that of the varied balance between the associative, commercial and public supply of sports services.

III-1- RECAP OF THE EUROPEAN MODELS OF SPORT

III-1-1- At legislative level

In all the countries of the western world, sport has been created and has developed thanks to the sports movement, the freedom of association and unpaid volunteers, usually outside the government sphere. It is the sports movement which brought out its importance, and the States started to take an interest in it in a variety of ways (depending on their differing conceptions of the role of government in community life), from the end of the Second World War. Consequently, at institutional level too, the sports sector possesses common characteristics in the various European countries, especially the fact that “the associative sports movement remains its fundamental component and its essential driving force” and that it “remains largely governed and organised according to the rules specific to it, largely defined at international level, and which guarantee it a large degree of autonomy” (Miège, 1996). One characteristic common to the various countries is that governmental and non-governmental structures exist side by side everywhere (Miège, 1993). It is their relations and their respective influence or control which vary from one country to another.

Pescante (1993) showed that there were different models of sports legislation in the European Union Member States. In his view, two models predominate, although these two types of organisation are not so extreme in reality and the two models have common principles, such as the recognition of the importance of unpaid workers, the autonomy of

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organisation of the sports movement and the need for government intervention in sport on account of its social values and its potential role in the educational context:

- ◆ **the liberal model**, in which sport is considered as the expression of the free, autonomous initiative of citizens. Its promotion and development are entrusted to the sports movement, government intervention is not expressed through legislation, but through various types of incentives in the form of financial contributions from the government to the sports movement, the supply of infrastructures and services (training, research, etc.) or both, its role being to create the material conditions for practising sport and to assist the sports movement. For example, in the United Kingdom, Sweden, the Netherlands and Norway, there is no framework law on sport, since there is no requirement for tasks to be shared between the government and the sports movement. The bodies at the head of the sports movement rely on international rules or their own rules. However, there are certain exceptions, such as the recent enactments in the United Kingdom on the safety of sports entertainment and crowd behaviour during football matches and in Sweden the Doping Act;
- ◆ **the interventionist model** where sport is considered as a public service. Its promotion, development and sometimes control are taken care of by the government in the form of a partnership with the sports movement. For example, in France, Spain and Portugal, the Sports Acts determine the legal framework for practising sport at national level. In Greece, Portugal and Spain, sport is recognised in the Constitution as a citizens' right.

Italy is a special case. The government has in fact assigned the entire task of promoting and developing sporting activities to CONI¹⁸ (Italian National Olympic Committee), as a public body.

Although the government organisation of sport reflects the scale of the governments' commitment to and control of sport, the degree of administrative decentralisation also influences the sports legislation models. Few countries have a Sports Ministry (France, Luxembourg and Spain, where the Sports Regulatory Body may be assimilated to a ministry). In the other countries, sports affairs are managed by other ministries (education, cultural affairs, environment, etc.). In general, engaging in sports which are widely practised in society is the responsibility of the decentralised bodies, whereas top-level sport and national and international sports activities come under the government.

¹⁸ since the Act of 16 February 1942.

However, there are different forms of decentralisation. ***In Germany***, for example, with a federal structure, the Länder are responsible for legislation and administration. Each Land has its ministry, whilst the Federal Government takes charge of top-level sport and competitive sport for the disabled. ***In Spain***, the autonomous regions can legislate on sport; each regional government has its own general sports department; the central government, with its Sports Act defines the fields of intervention and takes charge of the sporting activities of national and international importance, education, health and commercial legislation. ***In Belgium***, where the three autonomous linguistic communities are recognised, sport is considered as one of their exclusive prerogatives; each community has a minister responsible for sport and the decrees published by each of the communities have the force of law. ***In Italy***, the regions have legislative functions for the promotion of sport and leisure; the role of the central government is to provide guidance and coordination. Finally, as we shall see, the countries composing ***the United Kingdom*** have a large degree of autonomy of decision and organisation, whereas ***in France*** there is talk only of "devolution", with the organisation of a territorial structure subject to the national governmental body (regional and departmental services for Youth and Sport).

III-1-2 - The European model for financing sport

In general and in all the various countries of Europe, the financing is shared as follows (Andreff et al., 1995) :

- households (through their consumption of sports goods, their membership of clubs, etc.) provide the primary source of financing for sport;

- the local and regional authorities¹⁹ represent the second source of funding in all the countries;
- the contribution of the government and business remains a minor source in the overall financing of sport.

Even though as a whole in all the countries studied (in 1990), there is a general trend for private financing (mainly attributable to household sports consumption) to exceed public financing (relative unobtrusiveness of central government, but very strong involvement of the local authorities), the breakdown of public and private financing is highly diversified from one country to another and more detailed analysis brings out significant differences depending on the degree of decentralisation. Comparison of the sources of finance (Le Roux, Camy, 1995²⁰) results in the following breakdown (figure 5):

1- countries with high public financing:

- Denmark (39%);
- France (38%);
- Portugal (35%);
- French-speaking Belgium (33%);

Within which, there are:

- countries with strong decentralisation of public measures:
 - Denmark (the local authorities account for 84% of the total public financing) ;
 - France (the authorities provide more than 76% of the public financing)
- countries with a low level of decentralisation:
 - French-speaking Belgium (balanced distribution of public financing)
 - Portugal (idem).

2- Countries with high private financing:

- Spain (86%);
- United Kingdom (84%);
- Italy (81%);
- Germany (73%);
- Flemish-speaking Belgium (70%);

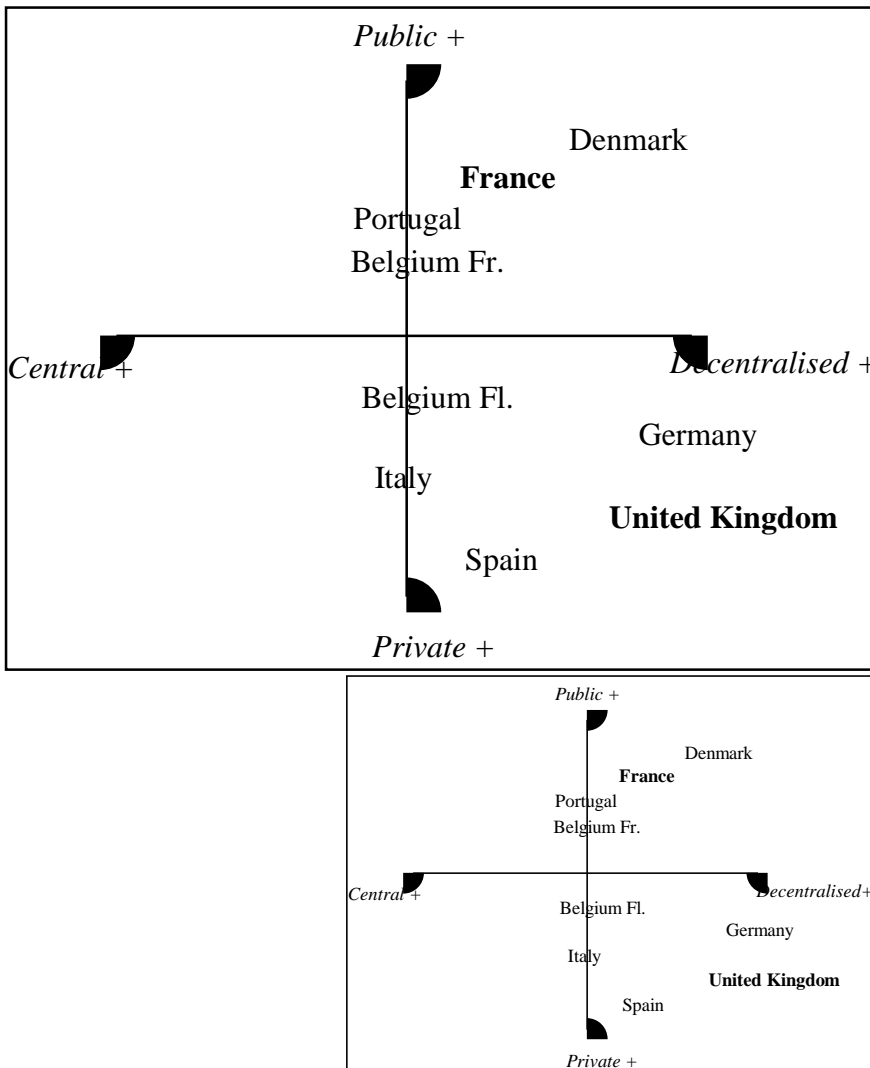
Within which it is possible to distinguish:

¹⁹ except in Italy on account of the significance of games (totocalcio and betting) in the funding of sport.

²⁰ on the basis of the figures put forward by Andreff et al. (1995)

- strong decentralisation of public financing:
 - United Kingdom (95% of the public funds come from the local authorities);
 - Germany (98%);
 - Spain (76.2%);
- a low level of decentralisation
 - Flemish-speaking Belgium (balanced distribution of public financing) ;
 - Italy (idem).

Fig. 5 : Sources of financing for sport and administrative decentralisation in Europe



III-2- NATIONAL STRUCTURES AND EMPLOYMENT

As we have seen, modern sport has been built up around an associative approach giving a special status to sporting activities in an educational process. Since the end of the 19th century, the associative sports movement has existed alongside the organisation of entertainment by professionals and the commercially supervised practice of leisure sports (physical training).

The gradual professionalisation of sport since the beginning of the 1960s accompanying a massive increase in the practice of sporting activities, diversification of the forms of practice and symbolic integration under the term sport of a growing number of physical activities, has taken place around three focuses which differ in importance according to the European country:

- ◆ **A public focus**, represented by the central government and local and regional authorities. It is less a matter here of stressing the role of the public authorities in financing sport as of observing the way in which the public authorities view their role in the development of sport. They consider that sport is a public affair which must largely be determined by the central government (or by its regional substitutes in the federally structured countries), or even that the central government must be directly involved in putting it into practice.

- ◆ **A commercial focus** which has been reinforced over the past twenty years around sport for entertainment, on the one hand, and leisure and tourist sport, on the other. [Sentence incomprehensible]. The entertainment form of this commercialised sport has developed around a few top sports, which alone account for most of the activity (football, Formula 1, basketball, cycling, tennis, etc.) and is expressed particularly strongly in the largest European countries. In its tourist and leisure form, commercialised sport has developed primarily around water sports, fitness, winter sports and outdoor activities.

- ◆ **An associative focus** in the process of development, i.e. adapting more or less deliberately to several types of pressures exerted on it:
 - ◆ that of the members, whose status is moving from one of adherents to one of consumers with growing demands regarding the quality of the service rendered, in a context of keener competition brought about by the slowdown in growth in practice of the sport;
 - ◆ that of the public authorities, and especially the local authorities, which are increasingly rationalising their direct or indirect aid policy and requiring associations to justify the importance of this aid to comply with the policies legitimating it.

The relative role played by each of these focuses in the development and professionalisation of sport has an impact on the forms and procedures for developing salaried employment (and more broadly paid work) in sporting activities. Naturally, the impact is firstly on the relative volume of employment in the associative, commercial and public sub-sectors of sports or sports-related activities, but it also extends to the forms of organisation of work and the methods for developing them. There is firstly the “bureaucratic” form and centrally regulated development, secondly the form subject to the associative ideology and to the relative statuses accorded to salaried work and unpaid voluntary work and thirdly the form subject to an unstable market in sports goods and services and to the types of organisation of work associated with it in very small enterprises (lack of job security, etc.) which is partially regulated by setting up a social dialogue.

The fifteen European Union Member States have their own backgrounds and differing balance between the roles of the three focuses we have just mentioned in their sports systems today. In addition, the process towards professionalisation (in the sense of rationalisation) which exists everywhere means that this balance has to be constantly reconstructed.

What is at stake in building a European model of sport seems to us to be the achievement of a new balance between these three focuses and the ability to maintain or to fail to maintain consistency between the different types of activities and goods which today constitute the sports sector. In our view, redefining the role of public services, that of the social partners and the specific characteristics of sport (special case for sport) lie at the heart of this question.

Facing this common challenge, but organised differently to meet it, the European Union Member States could be described in terms of absolute types which they more or less match up to.

- ◆ A first type, which could be termed as "**bureaucratic**",²¹ in which the public sector, and especially the central government, play a key role in the definition and implementation of sports policy. France will be taken as an example to illustrate this configuration.

²¹ Terminology taken from H. Mintzberg. *Le Management. Ed. Organizations*, 1993.

- ◆ A second configuration could be termed as "**entrepreneurial**",²² which means that even if there is a strong associative sports movement and not inconsiderable public participation, it is a process of rationalisation and systematic adjustment to demand which structures the supply. This demand is obviously not exclusively, or even primarily, commercial. But it orders the restructuring of the supply everywhere. The United Kingdom seems to us to provide a perfect illustration of this type.
- ◆ Finally, a third configuration, referred to as "**mission-based**",²³ persists in Germany with strong resistance from an associative sports movement very firmly rooted in local life, which as elsewhere is going through a serious crisis, but which has only left the market relatively little scope to express itself and where the public authorities, although increasingly interested in sport, still do not play a major role in policy. This configuration is reflected in a low level of employment in relation to the population.

As can be seen, there is no response in any of these cases which leaves full rein to market forces. But the main question is that of the overall consistency of the system with centrifugal effects which are brought to bear in the sectors of entertainment, leisure and tourist sport and, to a less easily perceptible extent, in a sub-sector which we have called self-organised sport. Mention must also be made of the difficulties encountered by the sports movement in ensuring the control of sport. Whether this movement is represented by the International Olympic Committee (or the European Olympic Committees issuing from it) or by the international federations (grouped in European confederations), it seems to encounter insurmountable problems in controlling professional sport, with its desire for autonomy and its profit, when they do not transform purely and simply into entertainment organiser. Moreover, its interest in leisure sports and tourist sport has always been limited, thereby leaving the way open for private enterprise. Like all the mission-based organisations, it repeats a message without gauging the changes under way. The stakes when commercialising sports entertainment, like those of European integration, have been underestimated or even ignored. Sometimes approximate democracy and shaky leaders destabilise this movement even more. Even in countries where there is no tradition of interventionism by the public authorities, the latter are increasingly coming forward to take charge of problems such as doping.

²² idem

The situation of European sport could be summed up as: community of problems and diversity of conditions and forms of organisation to deal with them. It is probably possible to report on the employment situation in the sports sector in the same way.

²³ idem

IV- UNCERTAINTIES AND SCENARIOS FOR EMPLOYMENT

A prospective study at European level is of interest on account of the sensitivity of employment in the sports sector to the public policies which have direct and indirect effects on the forms and volume of employment. On the one hand, the employment market in sport is supervised by the public authorities in several European countries. On the other, the public authorities can provide incentives to create new services and therefore jobs in the associative sector. Finally, the general sport policy (facilities, sport for all, top-level, etc.) produces an indirect effect on the nature and volume of the supply of employment in sport.

Without disregarding the importance of the peripheral employment in sport (distribution, manufacture of sports goods or equipment, etc.), we considered it necessary, in a first attempt at a prospective study, to position ourselves at the heart of employment in sport, i.e. sports services.

After having selected the uncertainties and major stakes with a bearing on the sports system and employment in sport in Europe, we propose three scenarios which we consider could determine the pictures of the future which will stir people to the greatest action to promote employment.

IV-1- FROM PREDOMINANT TRENDS TO UNCERTAINTIES AND MAJOR STAKES

Understanding the dynamics of employment in sport in Europe initially requires clear identification of the predominant trends with a bearing on the development of this system. A retrospective look in fact allows the outlines of the current developments to be picked out. But retrospective analysis of these tendencies is only a necessary, but insufficient stage of the prospective approach.

Three major types of trends should be considered here:

- ◆ The first concerns the trend in the demand for sports which has a direct impact on both the volume and characteristics of employment. In fact, in a society based on the market economy, trade is driven by demand. For its part, the supply, with marketing becoming its central function, seeks to adapt to the trends in demand and even to anticipate them thanks to innovations (goods and services). In this context, the market can only be driven by supply to a marginal extent.

- ◆ The second relates to the trend in employment itself and allows the trend in the characteristics of employment in sport to be detected, from both the quantitative and qualitative points of view.
- ◆ The third refers to the institutional and political regulation of employment in sport and in particular to the interaction between training system, regulations and collective bargaining, which plays a major role in matching training and employment. In this way, the ability of the system to anticipate and adapt to the trend in functions, skills and tasks in the sports services sector largely conditions the market of employment in sport and the effectiveness of the sports organisations.

IV-1-1- Predominant trends relating to the demand for sport

The trend in sporting activities since the early 1980s is characterised by both the increasing complexity of the forms of practice and by the presence of very largely ambivalent predominant trends. This means that the system of sporting practices has entered into an increasingly turbulent phase and that it is increasingly driven by contradictory internal tensions which make any clear development impossible.

1- Quantitative trends

There is a stagnation, and even a fall, in the percentage of sporting activities requiring permits throughout Europe.

On the other hand, even though it is extremely difficult to assess precisely the number of people engaging in sport outside institutions, it would appear that self-organised sport (jogging, urban climbing, rambling, basketball, etc.) is playing an increasingly central role in the sports system. In France, for example, of the 75% of Frenchmen who state that they engage in sporting activities, only 20% take part in sports requiring permits and 8% in competitions (Irlinger et al., 1985).

This “scissor” movement corresponds to the rise of individualism today, which takes the form of both a rejection of transcendence (whether in religion, politics, sport, etc.) and the search for control of one’s own life, a sign of individual fulfilment.

But this does not mean the disappearance of religion, politics, sport, etc. On the contrary, the relationships to religion, politics, sport, etc. are being redefined. This trend is not synonymous either with people withdrawing into their shells and the primacy of egoism over altruism or isolation over social effervescence and sociability.

At this stage in the analysis, one of the major medium-term stakes therefore relates to the capacity of the sports system to take into account and respond to these new forms of engaging in sport which constitute the driving force of the system. This has to be done without necessarily abandoning "traditional" sport, which has been the subject of public policies to date. For the time being in any case, the central governments and local authorities in Europe are not ready to embark on such a course and the initiatives along these lines are only marginal. One of the reasons for this situation relates to the deficiencies of such institutions in terms of skills and tools to meet such requirements. Another reason refers to the difficulty to arrive at clear identification of the new expectations, which defy any attempt at planning and putting on contract on account of the uncertain, transient dimension and the absence of any institutionalised talking partner. A third reason stems from the fact that the political representation of the self-organised practices is very largely negative. Thus, "non-institutionalised" sports would produce archaic forms of sociability and citizenship, inferior to those practised in clubs or would even generate anomie or social disorganisation. However, this is not at all sure. Finally, the feeling of "losing control" of public policies in the face of vague "target users" is undoubtedly not without significance.

The present conditions do not give grounds for thinking that politics will be taking account of self-organised sporting practices in the medium term. And actions in favour of "sport for all" are still directed too much by a traditional educational perspective (the club) to provide an appropriate response to the new expectations.

2-Qualitative trends

- ◆ The first qualitative trend largely explains the “scissor” development mentioned above. In fact, **the search for practice “with few constraints”** (Pociello, 1994) leads directly to the development of sport outside the associative or federation field.

- ◆ **Production for all versus diversification.** The second trend, which is intrinsically ambivalent, refers to the interconnection between a process towards production for all and a process of diversification of sporting activities. On the one hand, access to sport, without entering into a real process of democratisation, is tending to become universal. On the other hand, this move towards large-scale production, far from generating standardisation, takes the form of an explosion and growing segmentation under the effect of growing individualisation (self-organisation) of sporting practices. It should also be noted that the growing number of sportswomen (the percentage of women practising sport is approaching that of men) also contributes to the “revival” of and explosion in sport. In particular, it leads to the emergence of a demand for more “psychologically-based” practices, oriented more to beauty and health and getting back into shape in both senses of the term. This trend in a way responds to the dialectic between globalisation and fragmentation which is to be seen at the macroscopic level (general culture and local identities exist alongside one another). It is less the "Macdonaldisation" of sport which is seen as the immediate internationalisation of private practices and even the appearance of hybrid sports cultures. This dialectic between production for all and diversification has a direct impact on the structuring and strategies of the commercial supply of sports goods, which is immediately concerned by the internationalisation of sport. On the one hand, there is the creation of macro-markets regulated by oligopolies of large firms (sports footwear, tennis, skis, golf...), on the other, the continued existence of micro-markets (climbing, wind-surfing, mountaineering, caving, etc.) which allow SMEs which are the most innovative and the most open to the international market to develop.

- ◆ **Other trends... but with less influence on employment**

The third trend, which is also ambivalent, concerns the relations between ecology and technology in sport. There is both a demand for sport which is shifting towards the “natural” areas (mountain-biking, climbing, rambling, etc.) and the practice of sport

which is relocating within urban areas, whether these are public (skateboard or roller-skating, for example) or specialised (climbing artificial walls, for example). This process is also reflected in another ambivalence relating to the opposition between ecology and technology. The desire for nature is accompanied, not without ambiguity, by a demand for increasingly high-tech equipment (snowboard, paragliding, windsurfing, etc.), and even for specific adaptations making the relationship with nature less dangerous and more high-tech. This doubly ambivalent trend is partly responsible for the development of urban or extra-urban services with the advent of self-service in the field of indoor sports (artificial climbing walls, for example) and the supervision of “dangerous” outdoor sports (canyoning, for example). However, the majority of outdoor or urban sports are self-organised and have few economic repercussions (rambling, for example). Nevertheless, the attraction to these sports may contribute to the local development of sport tourism with the resultant creation of jobs in the hotels and catering sector. Moreover, and possibly more importantly, this trend stimulates the sports goods and equipment markets (technological innovations of the sports industries), as well as the market for the development of urban sports facilities.

- ◆ There are obviously other trends within the sports system. Of these, the promotion of championship sport through the media and its integration into the economy are certainly the most obvious. However, and paradoxically, it does not seem to generate major stakes for the trend in employment in sport in Europe. In other words, the question of the European model of sport, as set (and widely mediatised), is not capable of responding to the substance of the questions of employment in sport. Indeed, the search for a kind of third way between the commercial model of sport and the government-controlled model of sport leads to an interest being taken only in the “sports” dimension of sport. By trying to combat what is seen as the “abuses” of commercial sport (doping, cheating, corruption, etc.) and to maintain a close link between elite sport and amateur or mass sport, Europe merely defends a certain sports ideology (“clean”, “egalitarian”, “fair”, etc.). And there is no direct link between this policy and employment. Moreover, employment in the professional sports sector sport only accounts for a tiny proportion of total employment. Finally, it is not seen why such a policy would generate growth in employment and forms of employment which are more stable, protected or enriching than a sports system would do based on marketing or systematic government control. Which out of excessive commercialisation or controlled commercialisation of professional sport generates the most quality jobs? In short, the “real” question of employment in

sport lies elsewhere and Europe is, moreover, starting to become interested in “good practice” in the field of public policies.

IV-1-2- Predominant trends relating to employment in sport

Despite the first encouraging data, strong growth in employment in sport is not to be expected in the medium term. Demographic trends in fact counterbalance the trend towards growth in the 1980s.

1- Quantitative trends

Between 1980 and 1996, there was quite strong growth in employment in sport almost throughout Europe (from 13% to 100% depending on the countries studied, with the exception of Austria, Finland and Sweden for which we noted a downwards trend. This trend is however far from being confirmed if we analyse a slightly longer period). Nevertheless, it would not be prudent to count on an extension of this trend in the medium term on account of the demographic trend in Europe. In fact, whatever the scenarios or assumptions considered up to the year 2010 and beyond, the population of Europe will age: the percentage of people over 60 years of age of the total population is tending to become equivalent (around 25%) to that of the 0-19 year-old group, whereas in 1980 the latter accounted for about 30% and the over-60s for about 15%. Moreover, the total population of Europe is also tending to fall: according to a mean hypothesis, Europe will have lost 8.5 million inhabitants by the year 2010. Finally, it is found that working time practically stopped decreasing in the early 1980s and that the gain in “free” time is not systematically synonymous with an increase in the time “freed up”. Will public measures on the adaptation and reduction of working time be able to free up time for leisure? This is not at all sure, for flexibility of work, even if it is controlled, shows little “freeing up” potential and work still represents a major medium for socialisation, despite the announcement of the “end of work” and the advent of activity.

Thus, even if the lengthening of the cycle of sporting life is a trend at present, the percentage of people engaging in sport diminishes with age. There is therefore very likely to be a stagnation, and even a slight decline, in the volume of sport practised in Europe, unless there is a real democratisation of sport and the participation rate of the least favoured social groups rises (the unemployed, manual labourers, employees,

tenant farmers, etc.) to approach that of the "higher" social groups (teachers, senior executives, etc.). But that is far less likely than the ageing of the population!

Finally, in view of the trend towards not employing more young people in sport (the share of the under-25s remained stable - 22% to 23% - between 1990 and 1998), young people are liable to be among the categories most affected by unemployment.

2- Qualitative trends

◆ Self-employment

With the development of micro-markets in sports services and the hyper-segmentation of demand, the 1980s were characterised by the growth in a new form of employment: self-employment. Even though the data at our disposal indicate stabilisation in self-employment in the 1990s (15% of total employment), they do not take account of employment in very small enterprises (with fewer than 10 employees).

In fact, the "niches" not occupied by the commercial sector (the large enterprises in sport and sport tourism) and the public sector, which is still too focused on "traditional" sport (championships, clubs), have formed a pool of jobs for a not inconsiderable proportion of the "workers" in sport. According to Collins (1999), the percentage of jobs in sport within micro-enterprises (fewer than 10 employees) or micro-associations could be as high as 75% of the total employment. It should however be noted that this phenomenon is not specific to sport and that, contrary to preconceived ideas, European capitalism concentrates jobs within SMEs and SMIs. In Europe, employment in enterprises with fewer than 10 employees represents a third of total employment (that in enterprises with fewer than 250 employees accounts for two thirds of the total) (Eurostat, 1999).

This process is very much part of the "age of the revival of business and the spirit of enterprise" and was reinforced by the introduction of government measures promoting the setting-up of businesses (subsidies, tax measures, exemptions from certain taxes for the unemployed who set up their own businesses, etc.).

◆ Increase in the number of women and part-time work

The 1990s are characterised by a certain increase in the number of women employed in sport in Europe. In fact, the proportion of women employed rose from 39% in 1990 to 44% in 1998: today, nearly fifty percent of jobs are held by women.

In parallel to this feminisation, during the first half of the 1990s, there was a certain casualisation of employment in sport. In fact, the proportion of part-time work in sports sector employment remains high (higher than in the other economic sectors). This phenomenon can be interpreted as casualisation in so far as the majority of studies show that this form of work is still very widely endured.

There is therefore a correlation between the increase in the labour force participation rate of women and the development of part-time work. The question therefore remains as to whether the access by women to the sports labour market is the essential cause of this form of casualisation. If such were the case, Europe should develop specific policies on women's employment in sport in addition to the general policies.

IV-1-3. Institutional and political regulation of sport and employment in sport

Several trends are to be noted as regards institutional and political regulation. Firstly, there is a lesser commitment on the part of central governments and even a certain disinvestment in sport (Andreff, 1999). However, this phenomenon should be qualified for two main reasons. The first lies in a kind of decentralisation of the financing of sport, with the local and regional authorities (regions, boroughs, municipalities) taking over from central government. Hence the local authorities are constantly increasing their share of the public financing of sport. The second derives from the fact that, despite the strong influence of the liberal ideology advocating a cut-down role for government, there is a kind of "return to government" in the control of access to employment as a result of qualifications standards being imposed (cases of Spain and Greece in particular). Still more generally, although European integration, via the liberal principles of free competition, leads to strengthening the place of the market and free competition in sport, a political will is emerging which rejects the

American commercial model. This is expressed through the debate on the need for “making sport a special case” within Europe.

Secondly, there is a trend towards the professionalisation of sports clubs (Horch, 1994), inspired by both the transformations in the demand for sports (consumerist search for quality in sports services) and the presence of competition from the commercial sector. But this trend is no less ambivalent than the others, in so far as it is accompanied by a will, on the part of the sports movement, not to “lose its soul”, or in other words to maintain the associative identity against the trend to make the clubs purely commercial and to turn them into businesses.

Thirdly, the relations between the public authorities, the employer and employee associations, the sports movement and the training institutes are being redefined and are becoming more complex.

IV-1-4- Uncertainties and major stakes

At this stage in the analysis, it is appropriate to pick out the predominant trends and to pick out and select the major uncertainties which have an impact on the development of the system of employment in sport. In other words, the trends may contain more or less stakes for the future. Moreover, because of the dynamics of the ambivalent internal tensions, they are liable to cause bifurcation in the development of the system. Finally, there are a certain number of uncertainties in the strict sense of the term (not identified as trends), which need to be assessed in order to select those which contain the seeds of the major stakes for the development of employment in sport.

1- As regards the sports system

- ◆ The future of the Olympic ideal in question

Make no mistake, the relationship between sport as entertainment and sport for the masses is only a minor stake. On the other hand, the future of the sports ideal represents a major stake for the development of employment in Europe. As the main driving force of the promotion of championship sport and sport as entertainment, the sporting myth (glorious uncertainty of sport, fair play, equal opportunities, fair competition, etc.) supported by the Olympic movement has experienced one of its most serious crises in the 1990s, according to the commentators (journalists, sociologists, economists, etc.). The increased number of cases of doping, corruption, cheating, violence, etc. has uncovered a certain reality which the sports world was trying desperately to deny, or at least to qualify (there is no proof, the phenomenon remains marginal). However, the facts are recognised, the evidence is there and the court cases too. Doping, corruption...: a system organised by both sportsmen and the sports organisations! It is a far cry from isolated, exceptional abuse. The sporting myth would therefore seem to have been hard hit and already a certain number of sponsors are threatening to withdraw their contributions to the organisation of the Olympic Games, which is increasingly dependent on commercial financing.

If the belief in the virtues and values of sport weakens, neither the spectators and television viewers, nor the sportsmen, nor the commercial sponsors will commit themselves to the world of sport. The end of the sports ideology is therefore liable to take the very practising of sport with it.

However, here too, no actual indicator allows the announcement of the demise of the Olympic myth to be made prematurely. Despite the scandals, despite the court cases, despite the corruption within the International Olympic Committee itself... the illusion still seems to be intact. We are not seeing public alienation from the major sports events, whether the Tour de France, the world football championship or athletics. The public is still there and still wishes to believe in it. The IOC, through its spokesman J.A. Samaranch, seems to have succeeded in gaining acceptance for the idea that corruption is only a matter of "black sheep", who must be banned from the sporting world for it to return to its original purity. The cases brought before the courts and the very impossibility to get right to the bottom of the matter on account of the incessant moving of the borderline between the pure and the impure, the corrupt and the incorruptible, the drug abuser and the healthy person... seems to be one of the conditions for maintaining the myth. Even better, the renewed utopia of perfect transparency within the sporting world supported by the leaders of the sports movement

(the independent ethics committees), the politicians (the anti-doping procedures) and a certain number of economists and sociologists could very well revive the myth.

◆ Virtual sport and self-service or relational service?

Should the idea be taken seriously of the forthcoming advent of the society of information, video networks and the Net? Is sport not liable in its turn to be swept along by the wave of the myth of the communication society?

Moreover, is the relational and even the sociability dimension, which is at the heart of the (sports) services not liable to be called into question by the advent of a make-believe society?

In any case, certain indications would point to virtual sport not constituting only a possibility. In fact, not only does the present state of technological development allow the simulation of sports to be envisaged, but sophisticated software already exists which is dedicated to "practising" sport (the case of golf, for example). Moreover, it could be expected that the present generation, immersed in the atmosphere of video games, will be predisposed to welcome virtual sport with open arms and to prefer the emotions of pretend sport to those of "real" sport. Does a society with a tolerance threshold to physical and mental aggression at an all-time low (others tend to become a nuisance: cf. sexual harassment), not incite individuals to take refuge in the virtual world, with its lack of harshness and otherness? In this way, the young people of today would be the sports internauts of tomorrow and sports meetings would only take place through the intermediary of the Web, everyone at home, switched on to virtual other people, or within anonymous "virtual sports centres", in short "non-existent places" (Auger), where everyone would choose their sports programme on a self-service basis, each at the same time but separately from the others. In both cases, there would be the death of communication and the social link and the quality of the service, far from being based on the relational, would only refer to a technical, functional dimension (comfort, availability of simulation screens, etc.). This would therefore betoken the death of the relational aspect, but not of the quality of the service.

This is of course an extreme view and, once again, reality is far more equivocal: the consumption of video games does not take the place of practising sports, communication via the Internet does not replace face-to-face interactions. But it is the role of the prospective analysis to consider to the limit, and even to the absurd, the progress of a trend or an emerging phenomenon, in a word to imagine the unpredictable.

2- As regards the system of employment in sport

◆ The professionalisation of sports clubs

The major uncertainty concerning the system of employment in sport lies in the outcome of the professionalisation of the clubs, which seems to have got under way today in most European countries (with the exception in particular of Germany, where the sports movement seems to reject any compromise with the consumerist view of service).

Although the sports clubs have to move towards greater professionalism and to take responsibility for the "services revolution", it is nevertheless true that the foundations of associationism (common interests, work of unpaid volunteers, community sociability, etc.) are liable to crack. The dilemma of adapting clubs to the trends in demand for sport lies in the difficulty of changing the organisational structures without calling the identity of the organisations into question. The clubs do not necessarily control the frontier between a change in structure and a change in identity. Hence the resistance in some countries to the professionalisation, hence the risk of the clubs turning into businesses and of a lack of associative feeling. The successful approach to professionalisation of the clubs is therefore narrow and unsure.

It seems obvious that a certain professionalisation of the clubs would lead to job creation. For this, it suffices to convert the hours of unpaid work into monetary units, as a good economist, to assess the number of potential jobs in the associative sector. But are people prepared to pay the price of this professionalisation? Will the transformation of the association with its sociability vocation into an "associative company" of services for private individuals be accepted?

◆ The institutional and political interaction of the operators in the sports sector

From the point of view of institutional and political regulation of employment in sport, Europe is characterised by the diversity of the situations. This diversity can be reduced to two main standard ideals.

The first leaves it to the market to ensure the functioning of the sports system and employment in sport. Public intervention is never direct in the system. The qualifications structure is established bottom up, i.e. by the professionals, who

determine the necessary skills which the qualifying training must cover (skills -> qualifications).

The second is characterised by partial, controlled opening to the market and a certain resistance to the professionalisation of the sports associations. Here, qualifications are in a way imposed top down, i.e. by the Ministry of Sport (qualifications -> skills).

However, on looking at what is happening in Europe, these two models no longer seem capable of describing what is really happening as regards political and institutional regulation of sport.

3- As regards the macro-environment

- ◆ The future of activism (in sport): the duty to appear young and active

The 1980s and 1990s were characterised by the rise in importance of the cult of performance and the myth of perfect health and even eternal youth. The elderly (previously “old people”) acquired the status of “seniors”, thereby confirming not only that they were not ending consumption, but also their consumerist activism, whether cultural (travel, etc.) or in sport. Retirement must be “active”, it must prolong the relationship with time (efficiency) of the working world. It does not constitute a break, a change of rhythm, a compensatory rest or a special period when the time is taken to live differently, when a different relationship with time is introduced which is necessarily slower. On the contrary, any sign of discontinuity between working life and retirement is seen as a personal and collective failure. The duty to stay young is rather tyrannical as it imposes the production of evidence, both as regards physical appearance (anti-wrinkle cream, concealer, etc.) and behaviour (a programme of activities). Those who escape this order are stigmatised, they are suspected of “letting themselves go”, a deadly sin in a society which places performance at the heart of its system of values. Programmes for re-motivation, getting back into shape, beauty treatment, etc. are offered to them. In short, inactivity for its own sake, rest for rest, slowness are still the signs of lack of self-discipline, a certain physical and moral decline.

This order, in the field of physical and sporting activities, takes the form of prolonging the cycle of sporting life, of seeking healthy sporting practices which are beneficial to health and physical appearance. But what is the future of this trend?

IV-2. THE SCENARIOS AND HOW THEY PROGRESS

In view of the presence of major uncertainties and the diversity of institutional structures in Europe, we are faced with the impossibility of constructing an underlying scenario which would refer to what is most likely to happen in the future. Nevertheless, a certain number of almost inescapable trends up to the year 2010 reduce the scope of the reasonable possibilities. In fact, the ageing of the population, the presence of the commercial sector, the end of the associative monopoly, the desire in Europe not to copy the American model of sport, etc. make some scenarios very unlikely and even absurd or nonsensical (for example, the total disappearance of the market in the sports system). On the other hand, the selection of the uncertainties and the major stakes relating to the sports system, employment in sport and the macro-environment reduces the theoretical diversity of the scenarios.

The construction of the scenarios has therefore been undertaken on the basis of the dimensions of the system of employment in sport in Europe which have the greatest motive force and are the most uncertain. Hence the demographic (ageing), economic (economic sensitivity of demand to the variations in purchasing power) and technological dimensions (dissemination of innovations in sport) have not been retained in the combination of variables at the origin of the variety of the scenarios. In fact, although these dimensions obviously influence the functioning and development of the system, they do not for all that constitute dominant motive variables for employment in sport. In other words, they constitute dominant trends which seem unlikely to be reversed in the period up to 2010.

On the other hand, the dimensions relating to the institutional and political regulation and the trend in values and behaviour (at both macro-social and sports system levels) seem to be at the heart of the production of uncertainties and major stakes. On the one hand, the development in relations with other people, work, leisure, the sports ideal and the cult of performance contains the possibility of the sports system and employment in sport being changed completely. On the other hand, the way in which the institutional and political operators try to regulate this system may have a very substantial impact on the employment in sport scene.

The three scenarios presented here therefore correspond to the most “reasonable” combinations of the politico-institutional and socio-cultural variables.

Although political and institutional regulation allows considerable room for manoeuvre in adjusting the volume and forms of employment in sport, it is nevertheless clear that this margin is greater or smaller depending on the macro-social changes (case of scenarios 1 and 2).

The scenarios have been considered up to the year 2010 in order to take into account the major uncertainties which cannot be resolved in the medium term (5 years) and to bring out the major stages in the progress of the scenarios.

IV-2-1- The standardised personalisation of sports services and the entrepreneurial model

1- 2000-2005: virtual sport on its way in and competition on its way out

The European sports policy is concentrated on the relations between sport for all and sport for the elite and on the anti-doping campaign. Action remains marginal as regards employment.

The year 2001 is characterised by a series of revelations which tend to show that the corruption in sport represents the norm within sports institutions. Suspicion is becoming widespread. Here and there, the idea is starting to be accepted that the abuses of sport constitute a system which will inevitably be re-occur.

In 2002, there is a distinct decline in practice by permit-holders and even in self-organised practice. The number of permit-holders in Europe falls below the 50 million mark.

The sponsors and the media gradually withdraw from financing sports championships and entertainment. They refocus on humanitarian or ecological actions more worthy of the label “ethical”. The spectators and television viewers stop watching the programmes and the major sports events. The Tour de France stops in 2003, the world football and athletics championships in 2004.

The generation born between 1985 and 1995 very largely withdraws from the practice of sport requiring permits and self-organised sport. It refocuses on video

games and sports simulators which fuel their emotions without risk and without constraint. In 2003, the virtual sport participation rate among 10-25 year-olds already reaches 40%.

The applications for training within the sport science institutes fall sharply.

2- 2005-2010: the end of the Olympic myth and the information sports society

In view of the trend in the image of sport, the EU Member States decide no longer to grant public financing for championships and sports entertainment.

Despite the efforts of the European Union to combat what was still being called the abuses of sport at the end of the 20th century (systematisation of anti-doping checks, financial monitoring, etc.), the sports myth collapses. No-one believes in it any more. The year 2007 marks a radical change: the IOC dissolves itself. Those who long for the return of the sports ideal are reduced to a handful of elderly activists.

A European survey reveals that the practice of simulated sport very easily exceeds the practice of "real" sports. Among 10-25 year-olds, the virtual sport participation rate reaches 80%. Among the 25-50 year-old age group, the rate now reaches nearly 50%, irrespective of the sex of the people involved. The desire for the simulated is greater than the desire to do or to be.

3- 2010: a dominant entrepreneurial regulation, social handling of unemployment

The desire for simulation in sport and the symmetric abandonment of “real” sporting activities have completely changed the sports system. A radical transformation takes place in supply. The latter changes in nature and it is no longer sports services giving pride of place to the relational dimension which are offered, but individualised electronic services. The multimedia groups share the CD-ROM sports market and create Sports Centres where individuals can come to consume exciting virtual sport.

Despite the attempts at converting their training in the direction of the virtual, the sport science institutes tend to disappear in view of the competition from private institutes fighting the cause of the professionals or issuing directly from the professional federations. This final alliance constitutes the framework within which the skills and qualifications for employment in sport are defined, having been reduced to two major types of function. The first relates to control, surveillance and maintenance of personal computers or professional computers with giant screens and refers to the (large number of) jobs as “computer technicians”, which are accessible after training for six months to a year. The second concerns the design of software and sophisticated simulation equipment and refers to the (small number of) jobs as “computer engineers” for those who have completed 4 years of university training. There is an overall deskilling of employment in sport, where the jobs of low-skilled employees dominate and the “traditional” jobs in sports have all but disappeared from European society. Despite the deskilling of employment and an increase in the flexibility of work, the jobs remain relatively well protected. Sectoral bargaining or direct bargaining at the level of the large enterprises ensures fairly good working conditions and conditions of pay.

The Member States nevertheless seek to control access to these new trades on account of the psychological (and no longer physical) dangerousness of the practice of virtual sport.

The unemployment rate is low, in so far as the new virtual practices have very high growth rates. On the other hand, the unemployment rate is very high for the former holders of diplomas in traditional sport. The latter, who it is hard to retrain in information technology, receive a minimum subsistence income. In this perspective, the economic conflicts with the social. The social measures in favour of employment in sport only aim to correct the negative effects of the market.

IV-2-2. Scenario 2: The duality of sports services and the mixed model (entrepreneurial and bureaucratic)

1- 2000-2005: survival of the sports ideal and inevitable commercial regulation of sports entertainment

European sports policy concentrates on the relations between sport for all and sport for the elite and on the anti-doping campaign. But the EU remains powerless in relation to the growing power of the audio-visual groups and the effects of its policy are confined to limiting the “excesses” of the commercialisation of sport. Professional sport tends to regulate itself according to the principles of the American model.

Thanks in particular to the policy of the Member States and the strategies of the international sporting bodies, the Olympic myth is seen to survive. However, the suspicions have not entirely disappeared and the practice of sports by permit-holders gradually declines. The desire to engage in (sporting) activities relates to a very large extent to the practice of non-institutionalised sports (commercial services or domestic production). Micro-enterprises and even micro-associations develop to meet increasingly segmented and “tailor-made” demands.

Professional sport continues, but the audience ratings for sports entertainment are tending to stagnate and even to tail off.

2- 2005-2010: failure to take self-organised sports into account

Europe relies increasingly on traditional amateur sport (championships, clubs, federations, etc.) and its relations with the elite. It does not believe in the future of self-organised sporting practices, which are seen both as a fashion phenomenon and as providing little in terms of educational, civic and socialising values. The EU therefore continues to finance mainly traditional sport and refuses to finance programmes (especially in terms of equipment) aiming to develop self-organised sport.

In spite of this, the distinction between professional and amateur sport remains inevitable. The commercial sector has developed its hold on sport for entertainment and there is a move towards an American-style model (closed league without relegation). Moreover, the growing demand for quality in sports services which are less

and less competition-based tends to transform the associations into services companies.

Under these conditions, the sports clubs embark on a deprofessionalisation process to refocus on their traditional trade and mission, as well as on an increasingly small group of people composed of activists defending the cause of "pure" associationism.

A form of duality is then to be found within sports services. On the one hand, the commercial sector offers high-quality products but with access reserved to the social groups with high income. On the other, the associative sector and the public sector (local authorities) offer services accessible to all, but of lesser quality.

3- 2010: dominant entrepreneurial regulation, a dual employment market

The Member States and the local and regional authorities have withdrawn from the financing of professional sport and have reduced their subsidies to traditional sport which resists professionalisation.

Under the combined effect of stagnation of demand for training (on account of the loss of attractiveness of the sports sector) and the development of "little jobs" in the sports micro-enterprises, the unemployment rate is relatively low. The EU has chosen the American employment model, which gives priority to recruitment at the cost of social protection. However, the general working conditions and the average level of income are deteriorating. The clubs developing activism by volunteers have turned their backs definitively on job creation.

The employment markets in sport have a dual form. On the one hand, there is employment for the skilled (managers, technicians and employees), who are protected and well-paid within large enterprises (and even in the public sector) within which collective agreements are ensured. On the other hand, there is the employment for the low skilled, with little protection and low pay within small enterprises or self-employment.

Employment in sport is developing strongly in the management and commercialisation of sports services sectors.

The training institutes are privatising (business schools) and creating alliances with the professionals to define skills and qualifications. The sport science institutes are coming up against competition from commercial private education. For their part, the sports federations merely maintain training based on technical skills (leadership, supervision, training, etc.) as the resistance to professionalisation takes the form of the rejection of training in sports management.

Finally, some Member States merely regulate access to a limited number of sports occupations (the most dangerous).

IV-2-3. Scenario 3: The new alliance between sports services and the articulated model (entrepreneurial, bureaucratic and mission-based)

1- 2000-2005: sport for all to self-organised sport

Whilst defending the idea of a European model of sport based on continuity between professional and amateur sport, the EU tries to transcend the idea of “sport for all” based on the tradition of the sports club. It introduces a new policy based on the development of self-organised sporting practices. It encourages research programmes aiming to obtain a better understanding of these new demands for sport.

As regards traditional sport, the Olympic myth is relaunched. Thanks to the strategies of the sports movement (transparency, control, etc.) and the harmonised policies of the Member States in combating the abuses of sport (doping, cheating, etc.), the sports ideal is strengthened. By creating a new myth, that of the perfect transparency of the sporting world, the realisation of the utopia of a pure universe appears increasingly close. The sports myth is relaunched for a long time.

The cult of performance and activism (desire to do) tail off. The desire to be and the search for sociability take the upper hand. It is the search for citizenship more than that of performance which prevails in the "come-back" to the associations, even if practising sports is still the heart of sports associationism.

2- 2005-2010: sport for all and self-organised sport

Without abandoning traditional sport, the EU, having become aware of the stakes associated with the development of the practising of self-organised sport, introduces a policy of incentives for developing sports areas in and around the towns. As regards associative sport, the EU guides the professionalisation of the sports clubs thanks to a policy of training and optimisation of the use of unpaid volunteers and by facilitating the recruitment of professionals through tax aid. This aid is financed, in partnership with the professional leagues, through a system of redistribution of the elite to amateur sport.

The desire to be and the search to live together, to participate in humanitarian, charitable, political and cultural associations have been largely confirmed, especially among the young generations. However, this desire does not take the place of the desire to do. Practising sport is therefore revived.

3- 2010: the reconciliation of the entrepreneurial, bureaucratic and mission-based models

On account of the balanced development of the three economic sectors of sport, the opportunities for occupational integration are increasingly diversified. As regards the associative sector, under the influence of the advanced professionalisation, there is a growth in jobs of managers, whose main role is to provide the interface between the leaders and the unpaid volunteers. As regards the commercial sector, employment develops within indoor and outdoor structures. The former are to be found in the towns and operate according to the principles of self-service and personal sports supervision. This generates a supply of work based on the functions of director and manager of sports facilities. The type of sports services offered by the commercial suppliers varies according to the national cultures (climbing, fitness, team sports, etc.). The outdoor structures are both close to the big cities and in tourist areas.

As regards the public sector, it is above all the local and regional authorities which offer new jobs to develop and run the sports areas developed for the practising of self-organised sports. Town-planners and sociologists specialised in the analysis and development of informal sports areas are integrated into the sports departments of the local, borough or regional authorities (without counting the jobs created with regard to the construction and maintenance of these areas).

Overall, there is a balance between the jobs of managers, technicians and (skilled) employees.

The institutional and political regulation of sport in Europe, from the prospective of development uniting the economic and social dimensions, works on the basis of a balance between the three economic sectors of sport (commercial, public, associative).

The recognition of the “sports” sector leads to the generalisation of collective bargaining (central government, associations of employees and enterprises) at sectoral and/or company level. The latter ensures a good level of social protection and improves the working conditions by limiting the negative effects of flexibility. On the other hand, skills and qualifications are determined collectively in an institutional framework which brings together employers, employees, training institutes and the central government (responsible for guaranteeing that this system operates smoothly). This ensures a high level of qualifications in the sports employment sector and satisfactory working conditions and conditions of pay. In addition, the professionalisation of the sports associations and the development of outdoor commercial structures tends to increase the size of these sports organisations and to promote the social dialogue. For their part, the sport science institutes diversify their training programme in cooperation with the professional world and improve the relationship between training and employment.

Finally, even though the demand for sports training remains strong, the unemployment rate is decreased considerably on account of a better link between training and employment and sustained growth in the new sports services.

The clubs strengthen their professionalism and refocus on sports practices of a sociable nature. In fact, the associative sector only competes to a very limited extent with the commercial services sector, which essentially takes charge of outdoor activities and personal fitness. The public sector, at local level, concentrates on self-organised sport and on the sports associations, by devising links between these two types of sporting practices. The sports federations, in cooperation with the universities and the professionals, offer specific training relating to both sports supervision and associative management.

This final scenario giving pride of place to a European model of sport based on the balanced interaction between the economic sectors of sport and the cooperation between operators responsible for employment in sport constitutes an important basis from which to develop the recommendations.

SCENARIOS EUROPE 2010 Jobs in sports services			
	Individualised standardisation entrepreneurial model	Duality mixed entrepreneurial and bureaucratic model	New alliance articulated model: entrepreneurial, bureaucratic and mission-based
Demand for sport	<ul style="list-style-type: none"> * Desire for simulation * Virtual sport and self-service * Decline of the sports ideal * Marginalisation of the institutional and self-organised practice of sport 	<ul style="list-style-type: none"> * Desire to do * Self-organised sport and tailor-made consumption * Survival of the sports ideal * Marginalisation of associative sport 	<ul style="list-style-type: none"> * Desire to be * Self-organised sport and interest in the associative (sociability) * Revival of the sports ideal * Citizenship rather than cult of performance
Supply of sport	<ul style="list-style-type: none"> * Concentration (Sports Centres) and privatisation (Internet) * Marginalisation of sports championships and entertainment 	<ul style="list-style-type: none"> * Development of micro-enterprises * Duality between commercial sport (rich) / associative sport (poor) * Entertainment and professional sport abandoned to the commercial sector 	<ul style="list-style-type: none"> * Relative concentration in outdoor sector and fitness (SMEs) * Revival of associative sector * Sports championships and entertainment jointly managed (public, associative, commercial)
Form of institutional and political regulation	<ul style="list-style-type: none"> * Commercial regulation dominant * Marginalisation of the associative and public sector 	<ul style="list-style-type: none"> * Commercial regulation dominant * Resistance of the associative sector to professionalisation * The public sector runs top-level sport 	<ul style="list-style-type: none"> * Inter-sectoral cooperation (public, associative, commercial) * Professionalised clubs and maintenance of associative identity

SCENARIOS EUROPE 2010 (continued)				
Jobs in sports services				
		Individualised standardisation entrepreneurial model	Duality mixed entrepreneurial and bureaucratic model	New alliance articulated model: entrepreneurial, bureaucratic and mission-based
Quantitative characteristics of employment		<ul style="list-style-type: none"> * Overall decline in employment * Decline in demand for training (sport has lost its power of attraction) * Low rate of unemployment in the new sectors (virtual and self-service growing rapidly) but high for the old holders of diplomas in the sports sector 	<ul style="list-style-type: none"> * Low growth in employment * Stagnation of the demand for training * Reduced supply of work * Low unemployment rate and social protection 	<ul style="list-style-type: none"> * Sustained growth in employment * Growth in the demand for training * Large supply of work * Frictional unemployment
Qualitative characteristics of employment		<ul style="list-style-type: none"> * The sectors for occupational integration are limited to the commercial sector of virtual games * Access to the sports occupations is based on the skills defined by the enterprises * Surveillance and control functions, software design * Overall deskilling, employees with low skills * Decline of sport science institutes 	<ul style="list-style-type: none"> * The sectors for occupational integration are limited to the commercial sector * Dual labour market in sport (protected in the public sector and large enterprises, not protected in very small enterprises) * Duality of qualifications, working conditions and pay (management / little jobs) * Growth in self-employment and employment in the very small sports enterprises 	<ul style="list-style-type: none"> * The sectors for occupational integration are diversified * General raising of the standard of qualifications, working conditions and pay * Generalised collective bargaining ensures good social protection and limits the negative effects of flexibility * Growth in skilled employment in SMEs and associations * Balance between jobs of managers, technicians and employees (skilled)

SCENARIOS EUROPE 2010 (continued)			
Jobs in sports services			
	Individualised standardisation entrepreneurial model	Duality mixed entrepreneurial and bureaucratic model	New alliance articulated model: entrepreneurial, bureaucratic and mission-based
Strategies	<ul style="list-style-type: none"> * Europe has chosen a model of employment opposing the economic and social dimensions (social treatment of unemployment) * The central government and the local and regional authorities have withdrawn from financing sport for all and for the elite * Skills and qualifications managed by the commercial sector * Social protection ensured (large enterprise) but strong flexibility * The sports movement has disappeared * The sport science institutes no longer have any reason to exist 	<ul style="list-style-type: none"> * Europe chooses the American model with regard to unemployment * The central governments and local and regional authorities have withdrawn from financing elite sport * Collective bargaining in the large enterprises / lack of job security in the very small enterprises * The clubs develop activism by unpaid volunteers * The training institutes privatise (business schools) and the sport science institutes are subject to competition from commercial private instruction 	<ul style="list-style-type: none"> * Europe has found a development model uniting the economic and social dimensions * The central governments and local and regional authorities give dynamism to self-organised sport (equipment, promotion, etc.) and associative sport * The federations train in sports management with the cooperation of the universities and professionals * The clubs boost their professionalism and refocus on sociable sporting practices * The enterprises manage outdoor activities and personalised fitness * The sport science institutes diversify their training programmes in cooperation with the professional world

V- CONCLUSION AND PUBLIC POLICY RECOMMENDATIONS

Having finished taking stock, it is now a matter of proposing a set of measures and initiatives to contribute to both the development of sporting activities and to employment in the sector, whilst respecting the main policies defined in a “European model of sport”, bringing together public, associative and commercial operators. In other words, we have deliberately opted for scenario 3, the so-called "new alliance".

V-1- DEVELOP THE SECTOR BY ORGANISING THE RELATIONSHIPS BETWEEN THE SPORTS OPERATORS

Developing sporting activities with a view to generating beneficial social, cultural and economic effects within the European Union involves building a system ensuring complementary relations between associative operators (sports movement), public operators (local and regional authorities, central governments) and commercial operators (sports entertainment or leisure companies). The specific tasks of these operators must be specified or reaffirmed.

The public expression at European and national levels of a political project resulting from negotiations with all the operators (whether in the form of a law or a declaration)²⁴ is a prerequisite for the development of sporting activities under the necessary conditions of transparency. A suitable tax policy could provide an effective accompaniment to the introduction of such a framework.

The development of the “spirit of enterprise”, the first recommendation of the European Council of Luxembourg on employment, when adapted to the sports context, presupposes that the forms of expression of individual or collective initiatives coming under associative, public or commercial frameworks can find their place :

²⁴ in the form corresponding to the specific national characteristics

- ◆ **the encouragement of associationism** must be accompanied by respect for its principles and the rules of democracy; particular effort should be made with regard to adolescents wishing to develop projects themselves in this field;
- ◆ **facilitating the creation of commercial structures** can be undertaken not only by encouraging the young entrepreneurs in the field of sports services, but also by monitoring the activities with a monopolistic tendency of certain large groups of operators;
- ◆ likewise, it is no doubt necessary to avoid the **public services** taking charge of missions which would be assumed without difficulty by the other operators and **to concentrate their activity on the less-favoured groups of the population and on actions to promote development** (including in the form of support for practising sport: "sports tickets", for example).

V-2- BOOST THE SKILLS OF THE HUMAN RESOURCES IN THE ASSOCIATIVE SECTOR TO PROMOTE SOCIAL DEVELOPMENT

The associative sports movement is undergoing a crisis throughout Europe with regard to its tasks and its organisation. It encounters difficulties in coping with the diversification in the forms of practising sport (from the production of entertainment to leisure sports) and the abuse in its democratic functioning. The solution to these problems undoubtedly involves increased professionalisation of the people involved in the sports associations. But it is necessary to watch out for the trend which is emerging of "transforming the associations into businesses". All professionalisation which would lead to weakening the associative spirit (to give way to a user or customer logic) would be counter-productive. Adjustment to the trend in demand in an associative framework also involves "training" the volunteer leaders and controlled recruitment of professionals to promote the associative project.

Active participation by the members in the life of the association is a prerequisite for them to be able to play a role in strengthening the social link in the local area. This voluntary participation cannot be obtained without ensuring true democratic debate within the association itself.

The many initiatives taken in the European Union Member States to develop employment in the associative sports sector, in particular in the highly suitable context of the ILDE, should be conducted in this spirit.

Whilst respecting the independence of this movement, the public authorities can use the contract procedure to encourage it in the pursuit of its tasks.

V-3- CONSTRUCT A PROFESSIONAL SPORTS SECTOR AND SPORTS-RELATED SECTORS AS A PREREQUISITE FOR IMPROVING THE QUALITY OF EMPLOYMENT IN SPORT

The world of sport based on unpaid volunteers has not always sized up the requirements of the move towards professionalisation, especially with regard to respect of labour law. Remuneration which is undeclared or outside the rules of the employment contract, with disregard for the respect of the basic rights of employees, is all too frequent there. The uncontrolled increase in the number of part-time jobs, the almost total lack of collective consideration of the seasonal nature of sport or equality between men and women, the inadequacy of measures for retraining top-level sportsmen are a consequence of the low level of recognition of the potential role of the social partners and the social dialogue in the sports sector.

This inadequacy, which the supervisory authorities sometimes try to remedy through regulations, also has consequences on the organisation of work and the conditions for the production of services.

As very small (commercial or associative) enterprises are involved, as we have said, the employers and employees are not very organised. A public initiative should facilitate the emergence of representation of the sector at national and European levels (based on what happens in the United Kingdom, the Netherlands and France, for example).

V-4- IMPROVE THE RELATIONSHIP BETWEEN TRAINING AND EMPLOYMENT AND THE CAPACITY FOR OCCUPATIONAL INTEGRATION IN THE SPORTS SECTOR

The occupational integration of young people in sports companies and associations often takes place under difficult conditions. Young people finishing university courses are generally ill-prepared to exercise a profession in a sports organisation. The unemployment rate among such graduates and the low proportion of young people trained in sport science and working in the sector are too high in certain EU Member States.

On the other hand, the sports movement rarely has the means to provide the training to meet the needs. The result is that the number of people engaging in a profession in the sports sector without suitable training is very high in most EU Member States.

Better adaptation of training to employment in a sector of very small enterprises entails systematic development of schemes combining training and work defined and negotiated by the social partners.

Although it corresponds to general principles common to all the services sectors, the respect of the social functions assigned to sport must lead to the development of employment in the sports sector being undertaken in a way which is in accordance with this specific character.

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ANNEXES

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Employment in the sports sector in the European Union Member States, synopsis (in thousands). 1998

(1996 for France, Italy and the UK, 1995 for Austria and Finland; 1992 for Sweden)

	D	A	B	DK	E	FIN	F	EL	IRL	I	L	NL	P	S	UK
TOTAL POP. (1996)	81923	8061	10157	5263	39270	5125	58375	10475	3629	57399	416	15528	9928	8841	58784
TOTAL EMPLOYMENT (1996)	34465	3710	3791	2652	12396	2087	22287	3868	1308	20037	219	6846	4443	3963	26177
TOTAL EMPLOYMENT (1998)	35179	3525	3780	2645	12788	2166	22121	3533	/	19290	170	7337	4659	3925	26782
EMPLOYMENT IN COMMUNITY SERVICES (1998) (NACE = 92)	521.9	57.8	64.5	56	237.2	48.1	387.9	64.6	10.2	150.3	1.8	123.4	48.3	96.8	770.7
EMPLOYMENT IN THE SPORTS SECTOR (NACE = 92.6)	76 (+25%: East Germany) 95	7.8	14.5	12.6	56.3	7.0	94.7			55.0	0.24	24	14.3	25.5	221.5
Employment in the sports sector as % of the total population	0.11	0.10	0.14	0.24	0.14	0.14	0.16			0.10	0.05	0.15	0.14	0.29	0.38
Employment in the sports sector as % of total employment	0.27	0.21	0.27	0.48	0.45	0.33	0.42			0.27	0.14	0.33	0.32	0.64	0.85
Employment in the sports sector as % of employment in division 92	18.2	13.5	22.5	22.5	23.7	14.5	24.4			36.6	13.3	19.4	29.6	26.3	28.7

Sources: Germany: Mikrocensus 1998; Austria: Census of units of local employment and enterprises, 1999; Belgium: Labour Force Survey, 1998; Spain: EPA 1998; Finland: Housing and population census, 1995; France: Enquête emploi, 1996; Italy: National census (1996); Luxembourg: LFS 1998; Netherlands: EBB; 1996-98; Portugal: EPA, 1998; Sweden: number presented as total sports employment in Council of Europe, 1994; United Kingdom: LFS 1996 Q2.

Employment and unpaid work by volunteers in the sports sector in the European Union Member States, synopsis
(in thousands)

	D	A	B (French-speaking)	DK	E	FIN	F	EL	IRL	I	L	NL	P	S	UK
Total population (1990, thousand)*	63254	7729	3000	5140	38840	4986	56735	10160	3506	56719	382	14952	9896	8559	57561
Unpaid volunteers in sport (1990, thousand)**	2700		128.5	260	200	300	1000			600			20	450	250
No of voluntary workers per 1000 inhabitants	43		43	51	5	60	18			11			2	53	4
Total population (1996)	81923	8061	10157	5263	39270	5125	58375	10475	3629	57399	416	15528	9928	8841	58784
Employment in the sports sector (1998)***	95	7.8	14.5	12.6	56.3	7.0	94.7			55.0	0.24	24	14.3	25,5	221,5
No of jobs / 1000 inhabitants	1.1		no data for French-speaking Belgium	2.4	1.4	1.4	1.6			0.9			1.4	2,9	3,8

Sources : * Eurostat (1997) ; **Halba, Le Net (1997) ; *** EOSE Survey DG X

