

**Report for Deutsche Gesellschaft für In-  
ternationale Zusammenarbeit (GIZ)  
GmbH**

**Analysis of selected sub-sectors of the  
sport industry in partner countries**

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## Preliminary

The Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH mandated the German Sport University Cologne to analyse selected sub-sectors of the sport industry in partner countries. This report presents the entire research process, including the findings.



## Management Summary

The analysis of five sub-sectors of sport, namely information and communication technologies, education, fitness, retail, and tourism in selected partner countries revealed that sport is socially and culturally relevant in all countries. Moreover, there is potential for the sport sector to grow with emphasis on different sub-sectors. Education is relevant for employment, though other ways into the employment in the sport sector were also identified. Competency modelling is highly recommended to help people grow and develop the different sub-sectors.

Implications for the different areas can be summarised. Thereby, leveraging opportunities shall be identified in the countries. Moreover, it could be worthwhile considering an event portfolio strategy to boost the sport sector. For instance, concerning the social and cultural relevance of sport, leveraging local/national sports as an entry point for projects and initiatives has been identified. It is recommended to engage locally-known athletes or teams as project ambassadors and to build on existing structures to leverage projects. Partnerships as a value proposition for both sides could be set up, considering specific (social, cultural, economic) needs of the involved parties.

Several implications were drawn considering the economic potential and trends for the sport sector. First of all, the political, legal and financial frameworks will determine the appropriate approach for projects and partnerships. The political institution in charge of sport could be a good first point of contact. It has to be taken into consideration that the government policy dictates the priority and investment into the upstream and core activities of the sport sector. Upstream activities of the sport sector (construction, education, equipment) are the foundation for many sport sector activities. If public or private actors do not sufficiently develop them, core activities and downstream activities will be more difficult to implement. Boosting active participation in sport can facilitate economic growth in core activities of the sport sector (facilities, clubs, fitness, etc.). Boosting passive participation can increase economic growth in downstream activities of the sport sector (broadcasting, information & technology, betting).

Considering education, several implications were derived from the analysis. For instance, standardisation through certification for sport sector jobs that do not require formal qualifications such as a Bachelor's or Master's degree (including a clear overview of the needed knowledge, skills, abilities, and other characteristics) is highly recommended. This can lead to a better reputation of the sector and more trust in the services delivered. Specialised knowledge of the vast areas of sport management is crucial. However, abilities might be even more crucial. At times, formal education does not provide opportunities to develop these abilities. Sport-for-development (SFD) projects could offer opportunities to practise these abilities. Besides, volunteering and internships can also



provide necessary practical experience in the sport sector, which can be achieved through events, schools, or after-school programmes. It is recommended to educate and train advocates first so that they can spread the word and lead by example.

Considering competency development, it must be noted that knowledge is specific to the job role and sub-sector and should therefore not be a core focus of SFD projects. However, several skills, abilities, and other characteristics were identified as essential across job roles in various sport sub-sectors. Thus, these could be included as core competencies to develop for SFD project participants. Those SFD project participants should be trained (as before) to serve as advocates so that they can help developing competencies in the wider community.

Considering partnerships, governmental bodies or the respective federations could be contacted. There seems to be a high interest and potential for collaborations. However, it is mandatory that the collaboration should be mutually agreed, on and an open and transparent process is crucial. Moreover, when an event portfolio strategy is considered, knowledge transfer must be secured. In this regard, the National Olympic Committees could serve as a platform for knowledge transfer where different sports collaborate. Governmental or non-profit organisations might be better partners in implementing SFD projects as they are less likely to face a conflict of interest.



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## 1 Introduction

Sport and physical activity are deeply embedded in society and education systems (Petry & de Jong, 2022). Due to its high relevance, sport can be seen as an important means to address complex societal challenges such as gender inequality, socio-economic status, and health status (Petry & de Jong, 2022). The role of sport in development projects has gained importance in recent decades. In 2001, the United Nations appointed a Special Representative on Sport-for-development and Peace. In 2003, it adopted Resolution 58/5, highlighting the importance of sport in promoting education, health, development, and peace (BMZ, 2015). The social relevance of sport makes it a versatile tool that can be used as a platform and multiplier for diverse issues such as health, gender equality, inclusion, and sustainability. Its accessibility and universality make it possible to reach the masses, including young people and marginalised population groups.

The Gesellschaft für Internationale Zusammenarbeit GmbH (GIZ) identified unemployment and underemployment as one of the biggest problems in the partner countries of German development cooperation. Hence the GIZ has been promoting the development and improvement of vocational training in partner countries for more than 50 years. In this context, sport is used as an employability tool to teach essential competencies that make it easier for young people to access the labour market. Moreover, sport is a relatively labour-intensive industry, so growth in the sport industry will likely lead to additional jobs (Kokolakakis et al., 2019). It can provide employment opportunities for people with a wide range of skills. Whether in active tourism, professional and amateur sports, education, media, technology, or retail business, the cross-sectional field of sport has enormous potential, especially for young people.

The high societal, social, and economic relevance of sport can be used to create pathways to educational opportunities for young people. Educational opportunities can be divided into formal learning (e.g., schools and universities) and informal learning (learning on the job; Petry & de Jong, 2022). Formal education in sport and the associated increase in employability is complex due to the multi-layered nature of the sport sector (Giel et al., 2022). The employability of young people describes the individual, professional and social competencies of an employee that meet the professional and managerial requirements for the performance of professional activities (Müller, 2021). Technical vocational education and training is an alternative to structured university education in many countries (Giel et al., 2022).

Sport-for-development (SFD) can be considered a tool which also facilitates education. SFD can be defined as “the use of sport to exert a positive influence on public health, the socialisation of children, youths and adults, the social inclusion of the disadvantaged, the economic development of regions and states, and on fostering intercultural exchange and conflict resolution” (Lyras & Welty Peachey, 2011, p. 311). Schulenkorf et al. (2016) highlighted that SFD captivates many individuals as sport is emotional. This is used to “communicate, implement, and achieve non-sport development goals” (Schulenkorf et al., 2016, p. 22). Investigated SFD projects looked mainly into projects at the community level with a focus on specific programmes and their effects on the community (Schulenkorf et al., 2016). At the national level, policy development has been studied (Schulenkorf et al., 2016). An integrated literature review identified a lack of information on the livelihood of individuals participating in these SFD projects (Schulenkorf et al., 2016). However, this is important information, as individuals with their competencies will make their livelihood from the sport sector



and they will help grow the sport sector in their countries. Thus, SFD can contribute to an individual's employability through facilitating a range of competencies as part of the project.

In addition to increasing the employability of young people, it is also essential to increase labour supply and demand. However, increasing employability remains one of the most critical performance indicators for providers of sport-related education (formal and informal) and an essential selection and decision-making criterion for young people (Dinning, 2017). It is, therefore, imperative that (vocational) training offers create perspectives. This is only possible with competent partner organisations that co-develop academic and non-academic offers that are relevant and suitable for the respective labour market. These can be private companies, associations, universities, and governmental and non-governmental organisations.

Due to the duality of sport – on the one hand, as a means of promoting employability, and on the other, as a potential field of work – German development projects pursue an integrated approach to employment promotion. The heterogeneity of the sport sector can be illustrated by the multitude of economically relevant areas in the sport economy. The sport sub-sectors of education, fitness, information and communication technologies, retail, and tourism were particularly important for economic growth. Consequently, the sports economy can be classified as a cross-sectional industry. This results in several labour-intensive and economically relevant fields that can be used in the context of SFD projects.

## 1.1 Objectives

This report is associated with five objectives which shall be executed for eight partner countries and one region. The West Balkans are the selected region. For ease of comparison, two countries were selected as context: Bosnia and Herzegovina and Serbia. Thus, the selected partner countries to be investigated include, thus, Bosnia and Herzegovina, Colombia, India, Ivory Coast, Jordan, Kenya, Pakistan, Tunisia, Senegal, and Serbia.

The objectives are as follows:

- 1) Analysis of the sport sector's relevance (e.g., GDP, economic impact);
- 2) Identification of the sport sector's proportion of the country's economy and its growth potential;
- 3) Identification of employment opportunities in the sport sector;
- 4) Identification of the three dominating sub-sport sectors – under consideration of education, fitness, information and communication technologies (incl. eSports), retail, tourism;
- 5) Identification of employment effects of educational programmes geared towards multipliers in SFD related to the job market, respectively the sport sector.

## 1.2 Report structure

This report provides some theoretical considerations related to economic and human resources. The report's methodology is introduced. A scoping review on competencies and employability dimensions needed for jobs in the sport sector follows. Thereafter, the analysis is provided. This part is divided into country chapters. For each country, the same structure is employed.

- Overview of the national sport system to facilitate a better understanding of sport

- Country profile which includes data from a survey and desk research to outline economic potential
- Social and cultural relevance of sport identified through interviews
- Economic potential and trends in the sport sector identified through interviews
- Education and employment assessed through interviews
- Competencies for the sport sector evaluated based on assessing sport advertisements from the selected partner countries

This report provides answers to all the research questions formulated by the GIZ in their project overview. Table 1 outlines the research questions (RQs) and a chapter reference where answers to the questions can be found.

*Table 1. Research questions of the GIZ, as formulated in the project (and translated into English)*

<b>Number</b>	<b>Research question</b>	<b>Chapter references</b>
RQ1	What are core fields of the sport sector in the selected partner countries?	Country profiles, Discussion and implications
RQ2	Which resources are needed in the sub-sectors and which potentials can be identified (so that SFD can help facilitated resources)?	Education and employment, Competencies for the sport sector, Discussion and implications
RQ3	Which partners operate in the sport sub-sectors and what are opportunities for collaboration?	National sport system, social and cultural relevance of sport, economic potential and trends in the sport sector, education and employment, Discussion and implications
RQ4	Which sport sub-sectors in the selected partner countries offer potentials for business cooperations and developing areas of employment?	Country profile, Economic potential of trends in the sport sector
RQ5	Which employment effects can be related to training advocates through SFD projects for the labour market and to what extent should this line of training be optimised or revised?	Country chapters, Discussion and implications
RQ6	Which conclusions and implications can be drawn for SFD?	Country chapters, Discussion and implications

## 2 Economic and human resource considerations

### 2.1 Economic importance of sport

Assessing the Gross Value Added (GVA) is a common way to evaluate the economic value of a sector's economic importance (Kokolakakis et al., 2019). The GVA indicates how much value a specific sector adds to the goods and services producers have bought. Thus, the GVA represents the difference between a producer's costs and income. The sport sector can add value to the goods and services bought and contribute to the national economy's Gross Domestic Product (GDP). Sport can contribute to the economy in a magnitude of ways. Active participation or passive consumption of sport leads to a wide range of expenses within the sport sector (Ahlert, 2013), for instance, through the purchases of sport clothing or ticket purchases. However, identifying all sub-sectors that contribute to the sport sector is challenging. Hence, the European Union examined all classifications of economic activities and defined which sub-categories are wholly or partly related to sport (Panagouleas & Kokolakakis, 2012).

#### 2.1.1 Vilnius definition of sport

Estimating the sport industry's impact on a country's Gross Domestic Product (GDP) requires a definition of the sport industry (Kokolakakis et al., 2019; Panagouleas & Kokolakakis, 2012). Furthermore, evaluating the sport economy's impact based on an agreed-upon definition allows comparisons across countries. For this reason, the EU Working Group *Sport and Economics* developed the *Vilnius Definition of Sport*, as the foundation of data collection in the European Union (Panagouleas & Kokolakakis, 2012).

Established in 2007, the Vilnius definition of sport distinctly outlines the production activities of an economy that are connected to the sport sector. More than 400 categories of products relevant to the sport industry were identified. For instance, the repair of bicycles, the retail of dietary supplements or the construction of sport infrastructure were included. The more than 400 categories can be separated into three layers: the core, the narrow, and the broad definition (see Figure 1). The core definition includes economic sectors that offer sporting activities (sport facilities, sports clubs, fitness facilities and other sport facilities). The core definition is similar to CPA 93.1, which describes the Classification of Products by Activity (CPA). The CAP is defined by Eurostat, the statistical office of the European Commission. The narrow definition extends the core definition by including all economic activities regarded as prerequisites for performing sporting activities. Hence, products and services in the upstream value chain fall under the narrow definition of sport. For instance, the construction of sport facilities or the provision of sporting equipment. All economic activities which rely on sport as an input extend the narrow definition to the broad definition. In other words, all products and services have a (direct or indirect) relation to any sport activity but are not required to do sport. For instance, the broad definition of sport includes sport broadcasting or sport betting. Sport broadcasting relies on sporting activity, yet broadcasting is not required for physical activity.

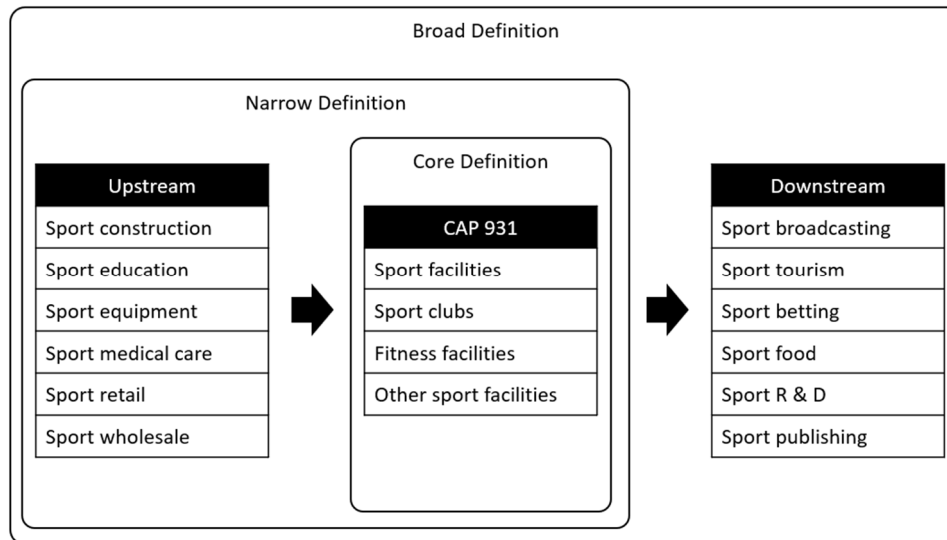


Figure 1. Three layers in the Vilnius definition of sport (adopted from Kokolakis et al., 2019)

### 2.1.2 Sport satellite accounts

To better quantify sport's economic and social importance, the 2007 *White Paper on Sport* from the European Commission suggested using sport satellite accounts (European Commission, 2007). A satellite account system is an extension of the national accounting system that provides an overview of specific sectors of an economy that cannot be observed through the traditional accounting system (European Commission, 2018; Panagouleas & Kokolakis, 2012). In other words, "a satellite account system is a robust statistical framework for measuring the economic importance of a specific industry, e.g. the sport sector, within the national economy" (Panagouleas & Kokolakis, 2012, p. 4). As such, a sport satellite account is dedicated to assessing the economic value of sport, identifies all economic activities related to sport, and places them in a separate account. Without a sport satellite account, the economic value of the sport sector would largely be concealed (Kokolakis et al., 2019).

The European Union aims to set up national sport satellite accounts to ensure the comparison between member countries by relying on the Vilnius definition of sport. Before establishing the sport satellite account, European countries independently evaluated the economic importance of the sport industry. However, the lack of an agreed-upon definition inherently limited cross-country comparison (Kokolakis et al., 2019; Panagouleas & Kokolakis, 2012). Today, sport satellite accounts serve as a robust statistical framework when measuring the economic importance of the sport sector to a national economy (Kokolakis et al., 2019). For example, sporting apparel is sorted into textiles, wearing apparel, leather and related products. The sport satellite account distinctly identifies all sporting apparel from the larger category and determines their economic value (European Commission, 2018). This approach, however, implies that satellite accounts cannot be added together and must be used for stand-alone interpretation.

### 2.1.3 Importance of sport in economic development

Indirect multipliers are often used to identify the economic importance of sport sectors. Indirect multipliers indicate how much output must be produced to satisfy a single unit of direct demand

(European Commission, 2018). As such, a multiplier is indicative of how financial injections into an economy will increase or decrease the output of the economy. “In essence, they can also show how much total output is necessary to produce to satisfy a single unit of direct demand” (Kokolakakis et al., 2019, p. 25). As such, the multiplier focuses on the growth potential and can specify the differences in the sport sectors. Hence, a multiplier of 1.7 means that 1.7 million EUR must be generated throughout the economy for a one million EUR output in sport services (Kokolakakis et al., 2019). Moreover, the higher interconnection within an economy and the fewer products are imported, the higher the multiplier. In other words, large economies can independently benefit from their ability to produce more goods and services.

The academic evidence suggests that the percentage of sport employment (i.e., individuals working in the sport sector) exceeds the percentage of GVA in an economy (Kokolakakis et al., 2019). Following this, it can be noted that sport is a relatively labour-intensive industry (Kokolakakis et al., 2019). Therefore, a growing sport industry likely yields additional employment opportunities, and sport might be an appropriate means to combat unemployment (Kokolakakis et al., 2019). The European Commission (European Commission, 2018, p. 9) states that an “increase of GDP by 1% goes hand in hand with an additional 1.35% of employment”.

## 2.2 Competency modelling

### 2.2.1 Theoretical considerations

The career construction theory (Savickas, 2002) proposed that careers are actively created within an individual’s social spheres. The individual goes through different stages, including career growth, exploration, establishment, maintenance, and disengagement (Savickas, 2002). Thereby, a self-concept is developed. That implies that individuals develop self-perceived attributes they consider relevant for job profiles. Thus, a vocational self-concept is created (Super, 1963 cited after Savickas, 2002). Self-esteem is important in identifying jobs matching an individual’s self-concept (Savickas, 2002). Career construction occurs when the self-concept is transferred to work roles within the social context. “Ideally, an occupational role enables an individual to cooperate with and contribute to the community in ways that both substantiate and confirm that individual’s self-concept” (Savickas, 2002, p. 166). A meta-analysis (Rudolph et al., 2017) on career adaptability highlights that career readiness (also named adaptivity), influences career planning and decision-making and then outcomes (i.e., adaptation results). These outcomes include employability and income, commitment, or turnover intention. The meta-analysis (Rudolph et al., 2017) highlighted the importance of developing competencies. An overview of several KSAOs is provided in the accompanying material.

### 2.2.2 Competency profiles for five sub-sectors

Competency frameworks are often summarised with knowledge, skills, abilities, and other characteristics abbreviated with KSAO (Bauer et al., 2021). The (U.S. Department of Labour, n.d.-s) US Department of Labour (n.d.) provided a detailed overview of essential competencies for various jobs, such as a marketing manager. The needed competency set can be applied to a marketing manager working in the sport sector. Regarding other characteristics, work values and styles were indicated (U.S. Department of Labour, n.d.-s). Desk research identified for each of the five selected

sub-sectors of the sport industry jobs and their competency profiles. These will be introduced exemplarily to get an overview of core competencies needed in the five sub-sectors.<sup>1</sup>

#### 2.2.2.1 Information and communication technologies

For the information and communication technologies sub-sector, profiles for 1) fitness and wellness coordinators, 2) exercise trainers and group fitness instructors, 3) recreation workers, and 4) community health workers were identified (see Table 2).

**Marketing managers.** Individuals in this role plan, direct, or coordinate marketing policies and programmes, such as determining the demand for products and services offered by a firm and its competitors and identifying potential customers. They also develop pricing strategies to maximise the firm's profits or market share while ensuring its customers are satisfied. Marketing managers oversee product development or monitor trends that indicate the need for new products and services. They identify, develop, or evaluate marketing strategy based on knowledge of establishment objectives, market characteristics, and cost and markup factors. Other tasks include formulating, directing, or coordinating marketing activities or policies to promote products or services, and working with advertising or promotion managers (U.S. Department of Labour, n.d.-r).

**Information technology project managers.** Information technology project managers plan, initiate, and manage information technology (IT) projects. The tasks include leading, guiding the work of technical staff and serving as a liaison between business and technical aspects of projects. They also plan project stages and assess business implications for each stage. Other tasks are related to monitoring progress to assure deadlines, standards, and cost targets are met. Information technology project managers manage project execution to ensure budget, schedule, and scope adherence. Besides, they confer with project personnel to identify and resolve problems. They monitor or track project milestones and deliverables. Other areas of project management are also essential. Thus, they submit project deliverables, ensuring adherence to quality standards. Moreover, assessing current or future customer needs and priorities by communicating directly with customers, conducting surveys, or other methods is part of their job. They also initiate, review, or approve modifications to project plans (U.S. Department of Labour, n.d.-o).

**Health informatics specialists.** The tasks that health informatics specialists pursue are manifold. They apply knowledge of nursing and informatics to assist in the design, development, and ongoing modification of computerised health care systems. They may educate staff and assist in problem-solving to promote the implementation of the health care system. They also translate nursing practise information between nurses and systems engineers, analysts, or designers using object-oriented models or other techniques. Moreover, health informatics specialists apply knowledge of computer science, information science, nursing, and informatics theory to nursing practise, education, administration, or research, in collaboration with other health informatics specialists. They design, develop, select, test, implement, and evaluate new or modified informatics solutions, data structures, and decision-support mechanisms to support patients, health care professionals, and their information management and human-computer and human-technology interactions within health care contexts (U.S. Department of Labour, n.d.-n).

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<sup>1</sup> All information presented in the following sections was derived from the U.S. Department of Labour (n.d.).

Table 2. Key job indicators for the three selected jobs of the information and communication technology sub-sector

Job title	Key job indicators
Marketing managers	Sales and marketing, initiative, national language
Information technology project managers	Leadership, integrity, initiative
Health informatics specialists	Attention to detail, cooperation, analytical thinking

### 2.2.2.2 Education

For the education sub-sector, profiles for 1) coaches and scouts, 2) recreation and fitness studies teachers, and 3) secondary school teachers were retrieved (see Table 3).

**Coaches and scouts.** Core tasks of coaches and scouts include instructing or coaching groups or individuals in the fundamentals of sports for the primary purpose of competition. They demonstrate techniques and methods of participation. They may also evaluate athletes' strengths and weaknesses as possible recruits or to improve the athletes' technique to prepare them for competition. Those required to hold teaching certifications should be reported in the appropriate teaching category. Coaches and scouts plan, organise, and conduct practise sessions. They provide training direction, encouragement, motivation, and nutritional advice to prepare athletes for games, competitive events, or tours. Good coaches and scouts adjust coaching techniques based on the strengths and weaknesses of athletes (U.S. Department of Labour, n.d.-j).

**Recreation and fitness studies teachers.** In this role, individuals teach courses pertaining to recreation, leisure, and fitness studies, including exercise physiology and facilities management. This profile includes teachers primarily engaged in teaching and those who do a combination of teaching and research. They initiate, facilitate, and moderate classroom discussions. Moreover, they prepare course materials, such as syllabi, home-work assignments, and handouts. They also maintain student attendance records, grades, and other required records. Other core activities are evaluating and grading students' class work, assignments, and papers. Recreation and fitness studies teachers also prepare and deliver lectures to undergraduate or graduate students on topics such as anatomy, therapeutic recreation, and conditioning theory. Finally, they also plan, evaluate, and revise curricula, course content, course materials, and methods of instruction (U.S. Department of Labour, n.d.-t).

**Secondary school teachers.** Secondary school teachers teach one or more subjects to students at the secondary school level. They prepare materials and classrooms for class activities. Moreover, they instruct through lectures, discussions, and demonstrations in one or more subjects, such as English, mathematics, or social studies. Core activities are related to establishing clear objectives for all lessons, units, and projects and communicating those objectives to students. Secondary school teachers also establish and enforce rules for behaviour and procedures for maintaining order among students. They adapt teaching methods and instructional materials to meet students' varying needs and interests. A core area of their work is maintaining accurate and complete student records as required by laws, district policies, and administrative regulations. They also observe and evaluate students' performance, behaviour, social development, and physical health (U.S. Department of Labour, n.d.-w).

Table 3. Key job indicators for the three selected jobs of the education sub-sector

Job title	Key job indicators
Coaches and scouts	Instructing, oral expression, dependability
Recreation and fitness studies teachers	Education and training, dependability, initiative
Secondary school teachers	Relationships, integrity, adaptability/flexibility

### 2.2.2.3 Fitness

Considering the fitness sub-sector, profiles for 1) fitness and wellness coordinators, 2) exercise trainers and group fitness instructors, 3) recreation workers, and 4) community health workers were extracted (see Table 4).

**Fitness and wellness coordinators.** Individuals manage or coordinate fitness and wellness programmes and services in this career. They manage and train staff of wellness specialists, health educators, or fitness instructors. They also manage or oversee fitness or recreation facilities, ensuring safe and clean facilities and equipment. However, fitness and wellness coordinators provide individual support or counselling for general wellness or nutrition. They supervise fitness or wellness specialists, such as fitness instructors, nutritionists, and health educators. A key activity is conducting needs assessments or surveys to determine interest in, or satisfaction with, wellness and fitness programmes, events, or services (U.S. Department of Labour, n.d.-m).

**Exercise trainers and group fitness instructors.** Individuals coach groups or individuals in exercise activities for the primary purpose of personal fitness. During their job, they demonstrate techniques and forms, observe participants, and explain the corrective measures necessary to improve their skills. They assist in developing and implementing individualised approaches to exercise. A key activity includes observing participants and informing them of corrective measures necessary for skill improvement. Thus, in brief, trainers and instructors evaluate individuals' abilities, needs, and physical conditions, and develop suitable training programmes to meet special requirements. Plan routines, choose appropriate music, and choose different movements for each set of muscles, depending on participants' capabilities and limitations (U.S. Department of Labour, n.d.-l).

**Recreation workers.** In this role, individuals conduct recreation activities with groups in public, private, or volunteer agencies or recreation facilities. Recreation workers organise and promote activities, such as arts and crafts, sports, games, music, dramatics, social recreation, camping, and hobbies, considering the needs and interests of individual members. They enforce rules and regulations of recreational facilities to maintain discipline and ensure safety. They also assess the needs and interests of individuals and groups and plan activities accordingly, given the available equipment or facilities (U.S. Department of Labour, n.d.-u).

**Community health workers.** This group promotes health within a community by assisting individuals to adopt healthy behaviours. They advocate for individuals' health needs by assisting community residents in effectively communicating with healthcare providers or social service agencies. They also act as liaison or advocate and implement programmes that promote, maintain, and improve individual and overall community health. Other important roles include delivering health-related preventive services such as blood pressure, glaucoma, or hearing screenings. Community health workers may collect data to help identify community health needs. They maintain updated client records with plans, notes, appropriate forms, or related information. Moreover, they advise clients



or community groups on issues related to improving general health, such as diet or exercise (U.S. Department of Labour, n.d.-k).

Table 4. Key job indicators for the four selected jobs of the fitness sub-sector

Job title	Key job indicators
Fitness and wellness coordinators	Integrity, cooperation, concern for others
Exercise trainers and group fitness instructors	Dependability, concern for others, relationships
Recreation workers	Self-control, cooperation, integrity
Community health workers	Relationships, dependability, integrity

#### 2.2.2.4 Retail

Within the retail sub-sector, profiles for 1) sales managers, 2) market research analysts and marketing specialists, and 3) business intelligence analysts (see Table 5).

**Sales managers.** Sales managers plan, direct, or coordinate the actual distribution or movement of a product or service to the customer. They also coordinate sales distribution by establishing sales territories, quotas, and goals and establishing training programmes for sales representatives. They analyse sales statistics gathered by staff to determine sales potential and inventory requirements and monitor customers' preferences. The direction and coordination of activities involving sales of manufactured products, services, commodities, real estate or other subjects of sale is also among their tasks. Sales managers resolve customer complaints regarding sales and service. They review operational records and reports to project sales and determine profitability. Some may also oversee regional and local sales managers and their staff (U.S. Department of Labour, n.d.-v).

**Market research analysts and marketing specialists.** This job role includes researching conditions in local, regional, national, or online markets. These analysts and specialists gather information to determine potential product or service sales or plan a marketing or advertising campaign. They may gather information on competitors, prizes, sales, and methods of marketing and distribution. They may also employ search marketing tactics, analyse web metrics, and develop recommendations to increase search engine ranking and visibility to target markets. Further tasks include preparing reports of findings, illustrating data graphically and translating complex findings into written text. They also collect and analyse data on customer demographics, preferences, needs, and buying habits to identify potential markets and factors affecting product demand (U.S. Department of Labour, n.d.-q).

**Business intelligence analysts.** Business intelligence analysts produce financial and market intelligence by querying data repositories and generating periodic reports. They devise methods for identifying data patterns and trends in available information sources. Moreover, they generate standard or custom reports summarising business, financial, or economic data for review by executives, managers, clients, and other stakeholders. Other tasks include synthesising current business intelligence or trend data to support recommendations for action. Business intelligence analysts also maintain a library of model documents, templates, or other reusable knowledge assets. They create business intelligence tools or systems, including the design of related databases, spreadsheets, or outputs. They manage the timely flow of business intelligence information (U.S. Department of Labour, n.d.-i).

Table 5. Key job indicators for the four selected jobs of the retail sub-sector

Job title	Key job indicators
Sales manager	Initiative, sales and marketing, integrity
Market research analysts and marketing specialists	Analytical thinking, attention to detail, dependability
Business intelligence analysts	Analytical thinking, attention to detail, dependability

#### 2.2.2.5 Tourism

For the tourism sub-sector profiles for 1) amusement and recreation attendants, 2) agents and business managers of artists, performers, and athletes, and 3) lifeguards, ski patrol, and other recreational protective service workers were identified (see Table 6).

**Amusement and recreation attendants.** They perform a variety of attending duties at amusement or recreation facilities. For instance, they may schedule the use of recreation facilities, maintain and provide equipment to participants of sporting events or recreational pursuits, or operate amusement concessions and rides. Besides, they also sell tickets and collect fees from customers. Moreover, they provide information about facilities, entertainment options, and rules and regulations. It is important that they keep informed of shut-down and emergency evacuation procedures. They also direct patrons to rides, seats, or attractions. Finally, they monitor activities to ensure adherence to rules and safety procedures, or arrange for the removal of unruly patrons (U.S. Department of Labour, n.d.-b).

**Agents and business managers of artists, performers, and athletes.** Core job duties are comprised of representing and promoting artists, performers, and athletes in dealings with current or prospective employers. They may handle contract negotiations and other business matters for clients. They also collect fees, commissions, or other payments, according to contract terms. Besides, this group of people are responsible for sending samples of clients' work and other promotional material to potential employers to obtain auditions, sponsorships, or endorsement deals. They should be kept themselves informed of industry trends and deals. They may also conduct auditions or interviews to evaluate potential clients. Another area covers the negotiations with managers, promoters, union officials, and other persons regarding clients' contractual rights and obligations (U.S. Department of Labour, n.d.-a).

**Lifeguards, ski patrol, and other recreational protective service workers.** Individuals pursuing jobs in this area monitor recreational areas, such as pools, beaches, or ski slopes, to provide assistance and protection to participants. Their duties include patrolling or monitoring recreational areas, such as trails, slopes, or swimming areas, on foot, in vehicles, or from towers. They rescue distressed persons using rescue techniques and equipment. They are also responsible for contacting emergency medical personnel in case of serious injury. However, their duties include examining injured persons and administering first aid or cardiopulmonary resuscitation, if necessary, using training, medical supplies, and equipment. They warn recreational participants of inclement weather, unsafe areas, or illegal conduct (U.S. Department of Labour, n.d.-p).



*Table 6. Key job indicators for the three selected jobs of the tourism sub-sector*

<b>Job title</b>	<b>Key job indicators</b>
Amusement and recreation attendants	Customer & personal, cooperation, concern for others
Agents and business managers of artists, performers, and athletes	Persistence, achievement, independence
Lifeguards, ski patrol, and other recreational protective service workers	Dependability, cooperation, concern for others

## 3 Methodology

The study objectives guided the methodological approach. A mixed methods approach was chosen. It consisted of accumulating knowledge through primary and secondary sources<sup>2</sup> and quantitative and qualitative methods. Table 7 provides an overview of the mixed methods approach and the outcomes to be delivered within this report.

Table 7. Mixed methods approach and outcomes

Outcome	Objective	Source	Method
Desk Research results on economic data	#3	Secondary data	Desk Research
Scoping Review	#3	Secondary data	Desk Research
Competency profiles for sport sector jobs	#5	Secondary data	Desk Research
Country profile	#1-5	Primary and secondary data	Desk Research, Survey
Sport system overview	#1, #3-5	Secondary data	Desk Research
Interview results	#1, #3-5	Primary data	Interview

### 3.1 Survey

#### 3.1.1 Measurement

The survey collected qualitative and quantitative data on different areas of interest. After collecting general information about the survey participants, current sport sector trends were queried. Beyond this, current challenges were explored, and several items examined employment aspects of the sport sector. Following this, questions concerning past and upcoming events and investments into sport infrastructure were asked. To conclude the survey, information regarding key players (i.e., individuals and organisations) and future projects in the sport sector were collected. Table 24 provides an overview of the questions used in the survey.

#### 3.1.2 Data collection

Data were collected through an online survey. The generated link was sent to sport sector experts in the selected countries. While the survey was only available in English, an accompanying document provided the questions in French to aid understanding in French-speaking countries. The mean distribution varied between countries. For instance, in Colombia, the country expert contacted potential survey candidates via LinkedIn. At the same time, the research team sent individual e-mails to the sport sector experts in India. Each country expert was tasked to answer the survey as well. Beyond this, the GIZ provided a list of individuals working for the GIZ in the selected countries. These individuals were contacted by the research team and invited to participate in the survey. The survey was online from 24 June to 5 September. The final sample size was equal to  $n = 76$ . Table 8 provides an overview of the number of participants per country and the average years of work experience in the sport sector.

<sup>2</sup> The availability of secondary data determined the extent to which qualified assumptions about the economic importance of the sport sector could be made.

Table 8. Overview of sample characteristics per country

Country	Participants	Average years of experience in the sport sector
Bosnia and Herzegovina	6	6.0
Colombia	10	16.0
India	8	11.1
Ivory Coast	9	13.8
Jordan	8	3.5
Kenya	10	14.6
Pakistan	10	8.17
Senegal	4	13.0
Serbia	2	11.0
Tunisia	9	15.7

Some information was obtained through desk research to complement the primary data collection. The desk research primarily focused on finding information describing the various countries' economic situations. To ensure comparability between the economic indicators, all information was obtained through the World Bank data catalogue (The World Bank, 2022b). The World Bank is a platform that collaborates with international agencies, regional development banks and other partners to build a consensus and define internationally agreed indicators<sup>3</sup>. Table 9 presents the definitions that underlie the indicators in the subsequent chapters.

Table 9. Definitions of the utilised indicators

Indicator	Definition
Inhabitants	Total population is based on the de facto definition of population, which counts all residents regardless of legal status or citizenship. The values shown are midyear estimates.
Population Density	Population density is midyear population divided by land area in square kilometres. Population is based on the de facto definition of population, which counts all residents regardless of legal status or citizenship – except for refugees not permanently settled in the country of asylum, who are generally considered part of the population of their country of origin. Land area is a country's total area, excluding area under inland water bodies, national claims to continental shelf, and exclusive economic zones. In most cases the definition of inland water bodies includes major rivers and lakes.
Gross Domestic Product (GDP)	GDP at purchaser's prices is the sum of gross value added by all resident producers in the economy plus any product taxes and minus any subsidies not included in the value of the products. It is calculated without making deductions for depreciation of fabricated assets or for depletion and degradation of natural resources. Data are in current U.S. dollars. Dollar figures for GDP are converted from domestic currencies using single year official exchange rates. For a few countries where the official exchange rate does not reflect the rate effectively applied to actual foreign exchange transactions, an alternative conversion factor is used.
GDP per capita	GDP per capita is gross domestic product divided by midyear population. GDP is the sum of gross value added by all resident producers in the economy plus any product taxes and minus any subsidies not included in the value of the products. It is calculated without making deductions for depreciation of fabricated assets or for depletion and degradation of natural resources. Data are in current U.S. dollars.
Gini-Index	Gini index measures the extent to which the distribution of income (or, in some cases, consumption expenditure) among individuals or households within an economy deviates from a perfectly equal distribution. A Lorenz

<sup>3</sup> The use of a single data sources ensures comparability within this project. However, different platforms of institutes might report figures that drastically differentiate from the numbers presented in this report.

	curve plots the cumulative percentages of total income received against the cumulative number of recipients, starting with the poorest individual or household. The Gini index measures the area between the Lorenz curve and a hypothetical line of absolute equality, expressed as a percentage of the maximum area under the line. Thus, a Gini index of 0 represents perfect equality, while an index of 100 implies perfect inequality.
Unemployment	Unemployment refers to the share of the labour force that is without work but available for and seeking employment.
Share of youth not in education, employment or training (NEET)	Share of youth not in education, employment or training (NEET) is the proportion of young people who are not in education, employment, or training to the population of the corresponding age group: youth (ages 15 to 24); persons ages 15 to 29; or both age groups.
Educational attainment	The percentage of the population age 25 and over that attained or completed primary education.

*Note.* All definitions were obtained from The World Bank (2022b)

### 3.1.3 Data analysis

The analysis of the quantitative data that was obtained through the survey was primarily descriptive. Hence, mean values and data ranges are presented on the country info sheets in chapter 5. The text, which accompanies the country info sheets, utilises the qualitative data obtained through the survey. Thus, the obtained qualitative information was consolidated and put into writing.

## 3.2 Interviews

### 3.2.1 Measurement

For each country, the aim was to conduct three interviews with recognised leaders from the sport sector to get qualitative information on employment opportunities and national sport sector trends. The country experts provided a list of 5-10 potential interview partners, along with short CVs or online profiles. The research team decided which individuals to contact via email or phone based on the information provided. The aim was also to balance interviewees from the public, voluntary, and for-profit areas. The semi-structured interview was divided into six parts, namely (1) housekeeping, (2) introduction question, (3) social and cultural relevance of sport, (4) economic potential & trends, (5) skills, education and employment, and (6) closing question about the future of the sport sector. The questions were provided to the interviewees in advance (see accompanying material), along with the Vilnius definition of sport.

### 3.2.2 Data collection

The interviews were conducted between 22 June and 9 September 2022 through voice and video calls (Webex, googlemeet, zoom, WhatsApp, etc.). Overall, 30 people from 10 countries were interviewed in 27 interviews<sup>4</sup>. The average length of an interview was 53 minutes. French was the main interview language for the Ivory Coast, Senegal, and Tunisia. In contrast, the main language for the other countries was English. Some exceptions applied where experts were translating into Arabic or English. After obtaining verbal consent, the interviews were recorded, transcribed, and coded. Table 10 provides an overview of the number of interviews conducted per country.

<sup>4</sup> In India, Pakistan, and Senegal one interview was conducted with two people.

Table 10. Overview of the interviews conducted per country

Country	Number of interviews
Bosnia and Herzegovina	1
Colombia	3
India	4
Ivory Coast	3
Jordan	2
Kenya	3
Pakistan	3
Senegal	3
Serbia	1
Tunisia	4
<b>Total</b>	<b>27</b>

The interviewees represented the three sectors. Nine interviewees worked in the public sector, 11 in the voluntary sector, and nine in the for-profit sector. To guarantee the anonymity of the interviewees, no names and organisational affiliations are disclosed. When the results are reported, a code is used as a pseudonym for reference purposes. Table 11 provides an overview of this information and includes the interview's date and duration.

Table 11. Overview of all interviews

Country	Sector	Pseudonym	Date	Duration
Bosnia and Herzegovina	Voluntary	BIH1VOL	08/08/2022	00:30:08
Colombia	Public/Education	COL1PUB	22/06/2022	00:58:36
Colombia	For-profit	COL2FPR	11/07/2022	00:39:09
Colombia	For-profit	COL3FPR	28/07/2022	00:48:17
India	For-profit	IND1FPR	30/06/2022	00:43:52
India	For-profit	IND2FPR	06/07/2022	00:28:00
India	For-profit (but also familiar with voluntary)	IND3FPR	07/07/2022	00:45:37
India	Public/Education	IND4PUB & IND5PUB	04/07/2022	00:41:38
Ivory Coast	Voluntary	CIV1VAR	21/07/2022	01:33:54
Ivory Coast	Voluntary	CIV2VOL	28/07/2022	01:08:12
Ivory Coast	Voluntary	CIV3VOL	25/08/2022	01:10:46
Jordan	Voluntary	JOR1VOL	07/07/2022	00:50:58
Jordan	For-profit	JOR2FPR	24/06/2022	01:37:44
Kenya	Public	KEN1PUB	26/07/2022	00:35:08
Kenya	Private	KEN2FPR	27/07/2022	00:46:55
Kenya	Public	KEN3PUB	02/08/2022	00:55:04
Pakistan	Voluntary	PAK1VOL	30/06/2022	00:58:13
Pakistan	Commercial	PAK2FPR	04/07/2022	01:37:09
Pakistan	Voluntary	PAK3VOL & PAK4VOL	04/07/2022	01:06:08
Senegal	Voluntary & Public	SEN1VOL & SEN2VOL	28/06/2022	00:59:57
Senegal	Public	SEN3PUB	24/06/2022	01:00:00
Senegal	Public/Education	SEN4PUB	29/06/2022	01:22:20
Serbia	Voluntary	SRB1VOL	09/09/2022	00:23:28
Tunisia	Education	TUN1PUB	03/08/2022	00:29:50
Tunisia	Public/Education	TUN2PUB	27/07/2022	00:53:05
Tunisia	Private	TUN3FPR	20/07/2022	00:33:45
Tunisia	Private	TUN4FPR	29/07/2022	00:32:14



### 3.2.3 Data analysis

A mixture of deductive and inductive coding was applied. An iterative process was employed. First, one researcher coded one interview. All researchers discussed the codes. As a result, a few changes were made to the code book. Afterwards, the coding was an iterative process. The first 10% of interviews were re-viewed after the last interview had been coded to ensure consistency. The interviews were coded with MAXQDA. The data and codes were then summarised in a descriptive analysis for each country as part of Chapter 5 (Sport sector Analysis) and Chapter 6 (Discussion and Implications).



## 4 Scoping Review

This chapter presents the review purpose, a brief overview of its methodology and core results in light of the project.<sup>5</sup>

### 4.1 Introduction

Competencies – knowledge, skills, abilities and other characteristics – are at the core of employability (Moreland, 2006). Competencies are needed to succeed in the job market (Finch et al., 2022). Sport-for-development projects strive to increase their participant's competencies in various areas. For instance, education and social cohesion – both help increase one's competencies – are already well researched within SFD contexts (Schulenkorf et al., 2016). However, Schulenkorf et al. (2016) also highlighted that research on livelihood-related matters was under-developed. Employability can help facilitate and secure livelihoods. In an SFD context, livelihoods mostly refer to financial independence (Schulenkorf et al., 2016), which is crucial for individuals. Hence, this chapter seeks to provide an overview of the available literature, focusing particularly on employability and competencies for the sport industry (through SFD projects). Three research questions were developed:

- 1) What is the relationship between employability and sport-for-development projects?
- 2) Which skills and competencies are delivered through sport-for-development projects?
- 3) Which skills and competencies are demanded by the sport industry?

### 4.2 Methodology

The review protocol for this scoping review was registered with the Open Science Framework<sup>6</sup>. Several eligibility criteria were set up in advance. These included:

- Published journal article in peer-reviewed journals
- English language
- Published 2000-2022
- Reported primary data
- Focus on sport-for-development or the sport industry
- Thematic relevance

Several exclusion criteria were determined concerning thematic relevance. For instance, the article was excluded if the focus was entirely on elite athletes, athletic skills, medical training, general youth development or curriculum development. Web of Knowledge and SportDiscuss were utilised as information sources. The search string was as follows: Skills OR Competencies OR Employability AND sport-for-development AND sport management OR sport industry. The inclusion criteria were agreed upon after independently evaluating the first ten titles. Calibration exercises were also executed.

<sup>5</sup> More details can be obtained from the authors.

<sup>6</sup> <https://osf.io/bfcxg/>

## 4.3 Results

The initial search identified 330 articles (304 through Web of Knowledge and 26 through SportDiscuss). Duplicates, unavailable records, and records not in English were removed, leaving 300 articles. These were screened for thematic relevance. Ten articles remained. Additional records were identified through reference lists and manual searches. To conclude, the review identified 26 journal articles.

### 4.3.1 Bibliographic information

The 26 journal articles were published from 2010-2022 by a total of 103 authors (three authors contributed to two articles). In most years, one or two articles were published. Peaks were identified for 2017 with four articles, 2020 with five articles and 2022 with four articles (at the end of July 2022). Most papers were published in management-related journals ( $n=14$ ), followed by education journals ( $n=5$ ), sport science journals ( $n=4$ ), policy and politics journals ( $n=2$ ), and sociology journals ( $n=1$ ). Appendix 8.2 provides an overview of all identified articles. Nine articles which reported results from research had received funding. The majority of studies originated from Europe ( $n=13$ ), followed by North America ( $n=5$ ), Oceania ( $n=4$ ), Asia ( $n=1$ ) and Africa ( $n=1$ ) as well as South America ( $n=1$ ).

### 4.3.2 Theoretical and methodological approaches

Ten of 16 articles were based on a theory or theoretical framework. Every article employing a theoretical perspective used a different underpinning. These varied from psychological needs theory to career decision-making theory, the competing values framework, critical reflection, dynamic capabilities perspective, human capital, programme theory, SFD theory, and three-factor theory.

Half of the identified studies employed a qualitative research paradigm, followed by seven studies using a quantitative approach and six studies applying mixed methods. Only one study used a longitudinal design, whereas 25 studies utilised a cross-sectional research design. The survey was the preferred method in the 26 identified studies. Table 12 provides an overview of the employed methods' frequency.

Table 12. Frequency of employed methods

Method	Frequency*
Survey	14
Interview	12
Delphi Method	4
Focus group	3
Autoethnography	1
Document analysis	1

Note. The total number exceeds the number of studies, as several employed a mixed-method design using more than one method.

The studies sampled employers and industry experts ( $n=13$ ), sport organisation representatives ( $n=4$ ), students ( $n=5$ ), graduates ( $n=2$ ), participants of SFD projects ( $n=2$ ), researchers ( $n=2$ ), and also coaches ( $n=1$ ) and SFD experts ( $n=1$ ). One study looked into job postings. Sample sizes varied from 4 to 6037 respondents. Most studies employed a qualitative research paradigm. Thus, the-

matic analysis dominated ( $n=14$ ) the data analysis procedures, followed by various types of bivariate analyses ( $n=8$ ) and summary statistics ( $n=7$ ). Other studies applied multivariate analysis of variance, exploratory factor analysis, confirmatory factor analysis, or regression analysis.

### 4.3.3 Thematic analysis

#### 4.3.3.1 Employability

Half of the identified studies related to employability. The themes in this regard varied. In some studies, employability was only mentioned. For instance, competencies could lead to employability or that employability gaps have been observed among graduates. Finch et al. (2022) referred to the dynamic capabilities perspective. They highlighted that education resources (i.e., formal educational qualifications), experience resources (role and years in the job), and competency resources (meta-skills and task-specific skills) contribute to employability (Finch et al., 2022). In contrast, Walker (2018) focused on work readiness. This could be considered a synonym for employability – though this is not discussed in her study. A sports-based intervention helped participants to increase their autonomy, relatedness and competencies (Walker, 2018). These elements can increase employability.

#### 4.3.3.2 Competencies

Twenty-five studies looked into different competencies<sup>7</sup>. All studies integrated their own set of competencies, and the interviews also provided a range of competencies. In the analysis, they were clustered into knowledge, skills, abilities, and other characteristics, which included work ethics.

**Knowledge.** Eleven essential knowledge areas were identified in the journal articles. These included subject-specific knowledge, psychology, medicine & dentistry, sales & marketing, communication & media, computer & electronics, customer & personal service, economics & accounting, personnel & human resources, administration & management, languages, and engineering & technology. Table 13 provides an overview of all knowledge areas and their appearance. The 11 different knowledge areas demonstrate the heterogeneity of competencies needed for specific jobs in the broad sports business sector – accounting for the different focus areas of the journal articles. However, the overview also acknowledges that classical management skills related to leadership (here summarised under the headings ‘psychology’ and personnel & human resources), marketing, communication, and administration & management are needed to be employable. Moreover, Table 13 clearly suggests that subject-specific knowledge is essential for almost any job. This was also portrayed by the journal articles – although not every single article included a reference to subject-specific skills.

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<sup>7</sup> These are based on information from the U.S. Department of Labour (n.d.).

Table 13. Overview of knowledge areas

	SSK	Ps	SM	CM	CE	CPS	EA	PHR	AM	La	ET
Baker et al. (2017)	2										
Bruce et al. (2021)	10	1									
Campos-Izquierdo et al. (2016)											
Coalter et al. (2020)											
Crisp (2020)											
Croxford et al. (2022)	2		1	1							
de Schepper et al. (2021)											
Dinning (2017)											
Finch et al. (2022)			14								
Griffiths et al. (2017)											
Freitas et al. (2017)					1	1					
Hall et al. (2019)			1		1		1				
Koenigsfeld et al. (2012)	5		1				1	1	1		
Ku & Hsieh (2020)	12	1	1	3						1	
Lambert et al. (2014)			1			2			1		1
Mallen et al. (2010)	2						2				1
Marshall & Barry (2015)	3										
Nachmias & Walmsley (2015)											
Nayar et al. (2013)											
Pierce & Irwin (2016)			3								
Raven (2018)											
Sato et al. (2021)	1						3				
Stewart-Withers & Hapeta (2020)	4	1		2							
Walker (2018)											
Wohlfahrt et al. (2020)	2		1						1	1	
Wohlfahrt et al. (2022)	9		4	2	1		1	1	3		

Note. SSK = Subject Specific Knowledge, Ps = Psychology, SM = Sales & Marketing, CM = Communication & Media, CE = Computer & Electronics, CP = Customer & Personal Service, EA = Economics & Accounting, PHR = Personnel & Human Resources, AM = Administration & Management, La= Language, ET = Engineering & Technology.

**Skills.** Considering a good skill set, the identified journal articles revealed 22 different skills (see Table 14). These skills included active learning, active listening, complex problem solving, coordination, critical thinking, instructing, judgement & decision-making, learning strategies, management of financial resources, management of material resources, management of personnel resources, mathematics, monitoring, negotiation, operations analysis, persuasion, reading comprehension, service orientation, social perceptiveness, speaking, system analysis, system evaluation, time management, and writing. Links to knowledge areas can be made.

Table 14. Overview of specific skills

	AL	ALi	CPS	Co	CT	In	JDM	LS	MFR	MMR	MPR	Ma	Mo	Ne	OA	SO	SP	Spe	SA	SE	TM	Wr
Baker et al. (2017)	1		1	1																		
Bruce et al. (2021)			1			3	1		1	1	1		2		3	2	1		2	8		
Campos-Izquierdo et al. (2016)				1		9																
Coalter et al. (2020)			2	1													1			1		
Crisp (2020)																						
Croxford et al. (2022)	1	1		2					2	2	2		1									1
de Schepper et al. (2021)					1													1				
Dinning (2017)			1	1														1			1	
Finch et al. (2022)		1	1						1	1	1							1			1	1
Griffiths et al. (2017)		1	1	2									1								1	
Freitas et al. (2017)				1						1	3		1								1	
Hall et al. (2019)				2	1		2		1	1	1	1		1							1	
Koenigsfeld et al. (2012)																						
Ku & Hsieh (2020)	1					1		2		1										1		
Lambert et al. (2014)	1																					
Mallen et al. (2010)																						
Marshall & Barry (2015)													1		1							
Nachmias & Walmsley (2015)																						
Nayar et al. (2013)								1		1	1											
Pierce & Irwin (2016)			1	1		1									1	9	2	1	1			
Raven (2018)			1					1										1				
Sato et al. (2021)														1						1		
Stewart-Withers & Hapeta (2020)		1	2															1	1			1
Walker (2018)																						
Wohlfahrt et al. (2020)																						
Wohlfahrt et al. (2022)	1	1	1	2	1		1		1	1	1		2		1		1	1	2	1		1

Note. AL = Active Learning, ALi = Active Listening, CPS = Complex Problem Solving, Co = Coordination, CT = Critical Thinking, In = Instructing, JDM = Judgement & Decision Making, LS = Learning Strategies, MFR = Management of Financial Resources, MMR = Management of Material Resources, MPR = Management of Personnel Resources, Ma = Mathematics, Mo = Monitoring, Ne = Negotiation, OA = Operations Analysis, Pe = Persuasion, RC = Reading Comprehension, SO = Service Orientation, SP = Social Perceptiveness, Spe = Speaking, SA = System Analysis, SE = System Evaluation, TM = Time Management, Wr = Writing.

The various skills identified in a single article and across all articles emphasised, that several skills were needed to be considered employable. It is the combination of various skills which makes an individual employable. As the journal articles covered various sport industry professions, no counts were compared.

**Abilities.** The journal articles discussed 10 different abilities relevant for employability in the sport business sector (see Table 15). These abilities included deductive reasoning, fluency of ideas, inductive reasoning, information ordering, oral comprehension, originality, selective attention, written comprehension, and written expression. Links to knowledge areas and skills were prevalent.

Table 15. Overview of specific abilities

	DR	Fol	IR	IO	OC	OE	Or	SA	WC	WE
Baker et al. (2017)	1					1				1
Bruce et al. (2021)	1		2			1	1			1
Campos-Izquierdo et al. (2016)										
Coalter et al. (2020)						8		2		8
Crisp (2020)										
Croxford et al. (2022)	1									
de Schepper et al. (2021)										
Dinning (2017)		1					2			
Finch et al. (2022)										
Griffiths et al. (2017)						1		2	3	
Freitas et al. (2017)		1								
Hall et al. (2019)	1		1			1	1			1
Koenigsfeld et al. (2012)										
Ku & Hsieh (2020)										
Lambert et al. (2014)										
Mallen et al. (2010)				2						
Marshall & Barry (2015)										
Nachmias & Walmsley (2015)										
Nayar et al. (2013)						1				1
Pierce & Irwin (2016)			4	5	2	8				
Raven (2018)	1									
Sato et al. (2021)										
Stewart-Withers & Hapeta (2020)						1	1		1	
Walker (2018)										
Wohlfahrt et al. (2020)	1		2							
Wohlfahrt et al. (2022)						2				

Note. DR = Deductive Reasoning, Fol = Fluency of Ideas, IR = Inductive Reasoning, IO = Information Ordering, OC = Oral Comprehension, OE = Oral Expression, Or = Originality, SA = Selective Attention, WC = Written Comprehension, WE = Written Expression.

**Other characteristics.** The other characteristics were differentiated in work values and work styles. Both are important when being employed. However, these can be commonly learned on the job. Therefore, some prior experience before the first job is recommended. Seventeen other characteristics were identified in the journal articles. These other characteristics included relationships, working conditions, achievement/effort, adaptability/flexibility, analytical thinking, concern for others, cooperation, dependability, independence, initiative, innovation, integrity, leadership, persistence, self-control, social orientation, stress tolerance. Table 16 provides an overview.

Table 16. Overview of other characteristics

	Re	WC	A/E	A/F	AT	CfO	Co	De	In	Ini	Inn	Int	Le	Pe	SC	SO	ST
Baker et al. (2017)	1		1	1	1		1		1	1							
Bruce et al. (2021)	1			1	1								1				
Campos-Izquierdo et al. (2016)																	
Coalter et al. (2020)			13		1				1	2			1	5		6	
Crisp (2020)	1															4	
Croxford et al. (2022)								1					3	3			
de Schepper et al. (2021)			1				1			1	1	1					
Dinning (2017)										1			1			1	
Finch et al. (2022)	1									1			1	1			1
Griffiths et al. (2017)			7	2					1	1	1		3	4	1	5	1
Freitas et al. (2017)			2			1					1		1				
Hall et al. (2019)		1	1	1				1		3			1	1		3	
Koenigsfeld et al. (2012)													1				
Ku & Hsieh (2020)			1														2
Lambert et al. (2014)	1		1							1			1				
Mallen et al. (2010)													1				
Marshall & Barry (2015)	1															1	
Nachmias & Walmsley (2015)																	
Nayar et al. (2013)			1			1						1					
Pierce & Irwin (2016)			1														
Raven (2018)																	2
Sato et al. (2021)			3			1					1	2				4	
Stewart-Withers & Hapeta (2020)	2														1	3	
Walker (2018)																	
Wohlfahrt et al. (2020)	1																
Wohlfahrt et al. (2022)	1		2	1									1			2	

Note. Re = Relationships, WC = Working Conditions, A/E = Achievement/Effort, A/F = Adaptability/Flexibility, AT = Analytical Thinking, CfO = Concern for Others, Co = Cooperation, De = Dependability, In = Independence, Ini = Initiative, Inn = Innovation, Int = Integrity, Le = Leadership, Pe = Persistence, SC = Self-Control, SO = Social Orientation, ST = Stress Tolerance.

The results suggested that achievement/effort, leadership, and social orientation were among the most cited qualities for the other characteristics. These qualities could be applied to various jobs in the heterogeneous sport business sector.

#### 4.4 Conclusion

The results' overview indicated that there is still a dearth of research on how SFD projects facilitate employability. Only one of the identified studies looked at employability through SFD and one at job competencies through SFD. The other studies focused more on employability and competencies within the sport business industry. Nonetheless, these insights are helpful when considering what competencies are needed to be successful in a professional setting and how to increase the economic growth of a given country's sport industry.

Knowledge of classical management skills is needed. However, applying this knowledge as behavioural anchors manifested in a skills and abilities set became evident. For instance, in the journal articles knowledge of communication and, as skills, active listening, reading comprehension, speaking, and writing were mentioned. This highlighted the linkages between the various competencies, here, between knowledge and skills. The results also outlined that other characteristics –often learned on the job – should not be underestimated as they have been considered important for being employable. However, these cover areas which might be more often overlooked. Therefore, it is recommended to help young individuals develop these competencies.

Summing up, the results retrieved from Table 13-Table 16 are very useful when preparing future sport sector professionals for their careers. They are also congruent with competencies needed for the selected jobs in the five sub-sectors of tourism, fitness, education, retail, and information- and communication technologies. Exemplarily, jobs per sub-sector and related tasks were outlined in Chapter 2.2. This underlines the importance of competency modelling for better career construction and development.



## 5 Sport Sector Analysis

This chapter is the core of this report. It contains the country chapters with 1) an overview of the national sport system, 2) the country profile containing information of the desk research on economic data and sport events and information from the survey, 3) an evaluation of the social and cultural relevance of sport based on the interviews, 4) a description of the economic potential and trends in the sport sector based on the interviews and the survey, 5) a brief information on education and employment based on the interview, and 6) an overview of competency profiles based on the jobs identified in the country's sport sector.

### 5.1 Bosnia and Herzegovina

#### 5.1.1 National sport system of Bosnia and Herzegovina (Author: Tarik Ajanovic)

##### 5.1.1.1 Political and economic background

Located in Southeast Europe, Bosnia and Herzegovina is a developing country (International Monetary Fund, 2022) characterised by ethnic and religious diversity stemming from its rich history and various cultural and political influences, both from the West and the East. With its specific internal system of organisation, Bosnia and Herzegovina stands out as one of the countries with the most complex internal organisations in Europe and beyond, characterised by high levels of sub-national autonomy. After gaining its independence from Yugoslavia in early 1992, the current constitutional framework was brought upon by the Dayton Peace Agreement in 1995 (OSCE, 1995). This ended the international conflict known as, inter alia, the Bosnian War. The Dayton Peace Agreement introduced a new national constitution still in force. As a consequence of the constitutional changes, the country of Bosnia and Herzegovina has been internally organised into three political entities with high levels of internal autonomy:

- 1) Entity: Federation of Bosnia and Herzegovina ('FBiH')<sup>8</sup>;
- 2) Entity: Republika Srpska ('RS')<sup>9</sup>; and
- 3) District: Brčko District of Bosnia and Herzegovina ('BD')<sup>10</sup>.

All three political entities retain high levels of autonomy in legislative and economic policies, which greatly influence the development of sport policies and investment opportunities. Further, the country is plagued by high levels of public corruption, affecting the development of all public and private sectors, including sport. According to Transparency International's CPI index, Bosnia and Herzegovina ranks 110<sup>th</sup> on the list of 180 countries and territories, with one of the worst results in Europe (Transparency International, 2022a).

The country is yet to achieve candidate status within the European Union and NATO, the former being strongly supported by most major political groups. It is also a member of all major international organisations, including full membership in the relevant sport-related organisations such as the International Olympic Committee (IOC) since 1993 (IOC, 2022a).

<sup>8</sup> FBiH is further split in 10 cantons, each one being responsible for, inter alia, its own policy concerning education and sport.

<sup>9</sup> Without cantons or internal demographic diversity, RS is very centralised.

<sup>10</sup> Following a later decision of the international Brčko Arbitration Tribunal for Dispute over Inter-Entity Boundary in the Brčko area in 1999.

According to the highly-politicised 2013 census (Statistika.ba, 2016), Bosnia and Herzegovina has a population of 3.5 million, including non-permanent Bosnian residents living abroad. The key national question is the ethnic/national division of its major groups – Bosniaks (50.1%, predominantly Muslim), Croats (15.4% predominantly Catholic) and Serbs (30.8%, predominantly Orthodox Christian; Statistika.ba, 2016). The remaining population is grouped into a non-ethnic category of others, including, but not limited to, individuals self-declaring into any other ethnic-neutral category such as Bosnians or religious or ethnic minority such as Jews, Roma etc.

Although the objective of this chapter is not to discuss the political organisation of Bosnia and Herzegovina as a state, it should be noted that the internal cohesion of the Bosnian society remains challenged due to the institutional tribalisation between the main ethnocentric political parties which have been in power since the Bosnian independence. In such circumstances, sports and its mobilisation in a political context have become, inter alia, a tool for continued political opposition and advancement of various ideas. This resulted in a lack of common policies on a national level which include the organisation and financing of sport. In essence, the Bosnian society remains a European society entrenched in its constitutional and political framework, resulting in mass emigrations. According to UNFPA research, Bosnia and Herzegovina tops the world list with the “lowest low” fertility in the world and is losing up to 1.5% of its population annually (N1 Sarajevo, 2022).

The Bosnian diaspora, believed to be around 1.8 million people in size, mostly resides in neighbouring Croatia and Serbia, with significant populations in Germany, Austria, Slovenia, United States, Sweden, and Switzerland (Ministry of Security - Sector for Immigration, 2021). Most migrations occurred as a consequence of the Bosnian War, with a sharp increase in economic migration to Germany in recent years.

With a GDP per capita of USD 6,916.4 (2021; The World Bank, 2022b) and annual GDP growth of 7.1% (The World Bank, 2022b) Bosnia and Herzegovina remains one of the least economically developed countries in Europe, with an estimated rate of 32.9% of youth unemployment (2021; The World Bank, 2022b).

#### 5.1.1.2 The sport system and structure of organised sport

Figure 2 provides an overview of Bosnia and Herzegovina’s sport system. The distinction between the two entities and the district is included.

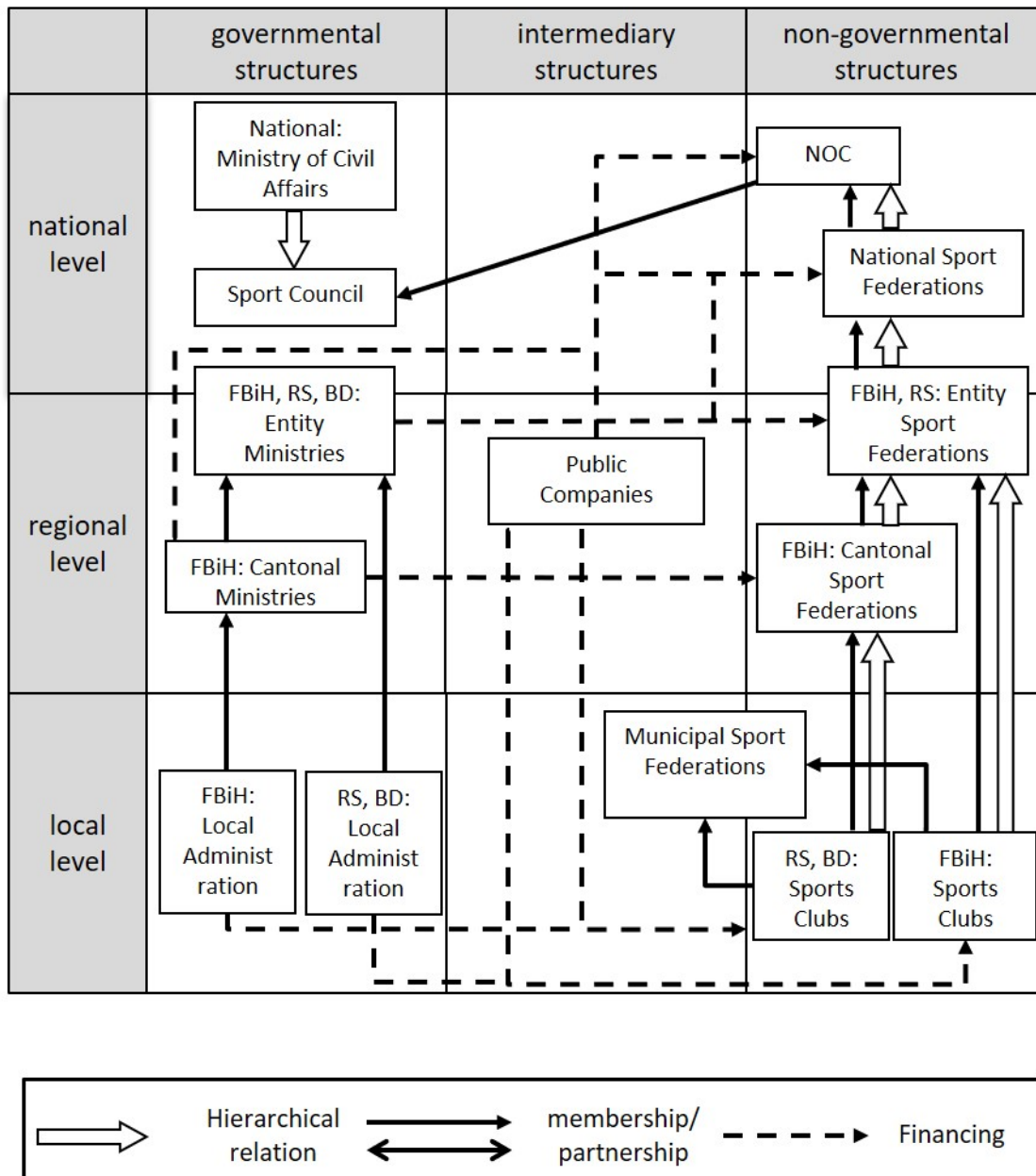


Figure 2. Structure of the national sport system of Bosnia and Herzegovina

#### 5.1.1.2.1 History of sport

Sporting participation has a long history in Bosnia and Herzegovina. It is a popular activity, for spectators and those who fully participate in various levels of organised sport. However, the sport sector's development (or lack of it) has often resulted from limited state-sponsored projects rather than private initiatives. This led to a heavy dependency on state aid and regulation, which are currently lacking and/or not achieving their goals, if any.

Starting in the late 19th century and shifting from traditional but unorganised popular activities of horseback riding, wrestling, and bullfighting, the first major development of organised sports started following the 1878 Berlin Congress when the Austrian-Hungarian Empire obtained the mandate to occupy Bosnia and Herzegovina, then a province of the Ottoman Empire. This cultural shift of mindset from East to West, brought upon by the rapid industrialisation of the country and the many different internal migrations from other parts of the Austrian-Hungarian Empire, exposed the

domestic population to some new customs and activities during the time leading up to the First World War such as skiing, mountaineering and motor racing. Further, some existing practises, such as military training and folk dancing, saw modernisation through the introduction of advanced training regimes and the creation of the first public associations nurturing the ethnic diversity of the country.

In the interwar period, Bosnia and Herzegovina became a part of the Kingdom of Yugoslavia<sup>11</sup>, promoting large-scale national projects such as gymnastics through entities associated with the pan-Slavic Sokol movement, with its own internal political challenges. The private sector slowly started looking for its place in the new political and economic reality. This shift of mindset once again changed the social realities, resulting in the creation of some of the country's oldest sports clubs, which survived to this day. However, such endeavours often came with a political undertone through workers' unions or national/ethnic heritage organisations (Mills, 2018). During this period, the ethnic tensions between the regions which are today Croatia and Serbia started paralysing the sports sector for the first time, which have been especially evident in football<sup>12</sup>.

However, the second and most important major wave of sports development occurred post-1945, i.e. after the Second World War. Yugoslavia's communist/socialist authorities saw sports as a useful propaganda tool with favourable side effects such as the development of social life and public health<sup>13</sup>. During this period, some of the biggest highlights of Bosnian sport were achieved. For example, KK Bosna Sarajevo won the FIBA European Champions Cup<sup>14</sup> in basketball in 1979, and Sarajevo hosted the 1984 Winter Olympics.

Following the Bosnian independence in 1992, the 1992-1995 Bosnian War brought losses of lives, including athletes who died as civilians or military personnel. At the same time, the war resulted in heavy destruction of public infrastructure and sports venues were not spared (Garfield, 2018). In some instances, they were used as frontline positions or war crime sites (Mills, 2016) and forceful evictions (Wabl, 2018). In light of that, membership rates for the Bosnian Paralympic teams increased post-war through individuals affected by injuries sustained in war and public financial support. For instance, the men's national sitting volleyball team became one of the best teams in the world.

Today, Bosnia and Herzegovina is considered an underachiever in organised sports but a breeding ground for talented individuals who often achieve their full potential abroad. Due to the old and failing infrastructure, lack of public and/or private investments in sports and overwhelming corruption, the only consistent highlight remains the Bosnian national football team. It qualified for the 2014 FIFA World Cup in Brazil for the first time. However, even that has not helped much with expanding its fanbase across the nation because most Bosnian Croats and Serbs rarely support it. They prefer supporting the national teams of Croatia and Serbia, respectively. The Bosnian team

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<sup>11</sup> Kingdom of Yugoslavia for the sake of brevity as the state had been known initially as the Kingdom of Serbs, Croats and Slovenes between 1918 and 1929.

<sup>12</sup> As a way of example, Croatian players and teams refused to participate in the national representative team of the Kingdom of Yugoslavia for the 1930 FIFA World Cup. This resulted in a team which de iure represented the Kingdom of Yugoslavia but de facto was a team consisting of players and coaches from Serbia.

<sup>13</sup> This had been a well-known phenomenon across the socialist and communist world at the time. For a more in-depth look, publications such as the following can provide more context: Brentin, D., & Zec, D. (2020). *Sport in Socialist Yugoslavia* (1 ed.). Routledge.

<sup>14</sup> Known today as EuroLeague.

often consists of players born or brought up abroad, which does not reflect the quality, or the lack of it, domestically.

However, certain successes of other teams and individuals bring light to the undisputed levels of talent found within Bosnia and Herzegovina such as Lana Pudar in swimming, Amel Tuka in athletics and the Bosnian national basketball team. To illustrate this point, the authorities approved the building of an Olympic-sized pool in Mostar only after Lana Pudar, a native of Mostar herself, had won the gold medal in the 2022 European Championship (N1, 2022).

#### 5.1.1.2.2 *The organisation of sport*

**Legal Framework.** The political and social realities of Bosnia and Herzegovina permeate all of its aspects, including the (dis)organisation of its sports sector. Mainly due to its post-socialist reality, the post-transitional society of Bosnia and Herzegovina still retains a degree of collectivist and obsolete economic and social patterns causing the whole country to severely fall behind its neighbouring countries in the development of the sports sector. Further, due to its internal political divisions, the sport sector is heavily interconnected with the sport sectors of the neighbouring countries of Croatia and Serbia. Thus, it acts as a feeder to their national sports systems. Many prospective athletes switch their sporting allegiance to those countries in hopes of obtaining better opportunities (Klix, 2019).

The Sports Law of Bosnia and Herzegovina (Government of Bosnia and Herzegovina, 2008; 'National Sports Law') was adopted nationally in 2008. It had the objective to define the sports activity and establish the main principles of its organisation by creating a legislative framework for its further development on a sub-national level. Indeed, art. 5, par. 1 of the National Sports Law defines sports as a decentralised activity:

“Sport in Bosnia and Herzegovina is organised in a decentralised manner with rights and competencies of Bosnia and Herzegovina, the entities, Brčko District of Bosnia and Herzegovina and other levels of administrative organisation. Sport-related matters which this Law does not regulate are to be regulated in accordance with the constitutions of the entities and other levels of administrative organisation.”

However, the National Sports Law has largely remained underutilised and unsynchronised with the realities of sub-national entities: FBiH, RS and BD. While RS has had its own Sports Law of RS ('RS Sports Law') since 2002, which therefore even precedes the National Sports Law, and which has been updated in 2020 (Republika Srpska, 2020) coming into force in 2022, FBiH has not yet adopted its own Sports Law of FBiH ('FBiH Sports Law'). Even BD, which sits somewhere between a municipality and a canton in terms of legislative and sporting capacity, has had its own Sports Law of BD since 2011 (Brčko District of Bosnia and Herzegovina, 2011).

It should be noted that there are limited legislative efforts within FBiH to adopt legislation which should be a part of the FBiH Sports Law. Yet, they are mostly oriented towards the professionalisation and privatisation of sports clubs (FBiH, 2019), particularly in football. Moreover, they focus on financing national representative teams (FBiH, n.d.). This highlights that no sustainable sports policy is on a national and sub-national level. It is very indicative that the sub-national entity of FBiH is the political entity where some interest exists to finance (inter)national activities of the state of Bosnia and Herzegovina as no political consensus exists on a national level (Sport Centar, 2021).

Speaking of these inconsistencies between a national and sub-national level, a professional sports club is defined as a for-profit business entity in the National Sports Law. In reality, such clubs still exist as associations in accordance with the relevant laws on a FBiH and RS level. A good example of sub-national resolution to public issues is a well-known legislative solution allowing FBiH<sup>15</sup> and RS clubs to repay their public tax debts for up to 10 years without paying the relevant interests. Despite this leading to some clubs operating with blocked bank accounts, that is completely in cash, the years of non-transparent mismanagement of sports clubs has contributed to the fact that many of them have tax debts which are several times over their annual budgets.

**Strategy and Financing.** The National Sports Law has designated the Ministry of Civil Affairs of Bosnia and Herzegovina ('Ministry of Civil Affairs') as the competent authority to manage sport nationally. However, the National Sports Law and the overarching constitutional realities in Bosnia and Herzegovina have still left most of the sports activity on sub-national levels. Therefore, legislative changes are very slow to come into effect due to the lack of a common sports policy. For example, the 2016 legislative changes to the National Sports Law introduced equal gender representation in the Sports Council of Bosnia and Herzegovina. However, several years after those changes, the positions in that body have remained vacant (Sarajevski Otvoreni Centar, 2018). Further, political blockades on the national level affect sports as well. Due to the lack of consensus concerning the national budget of Bosnia and Herzegovina for 2021, no funds were awarded for co-financing sporting events during that year (Klix, 2021).

The strategy for sport development in Bosnia and Herzegovina ('National Sports Strategy') is seemingly also a formality. It is not publicly available, the latest available for the 2010-2014 period (Ministry of Civil Affairs of Bosnia and Herzegovina - Section for Sport, 2018). According to Amel Mekić, an ex-Olympian and member of the General Assembly of Sarajevo Canton, the Bosnian standard of financing sport with 0.05% of the national budget is extremely below the European average with of 1.5-2%, particularly since it is mainly financed from sub-national levels without a unified strategy (StartBiH.ba, 2022a).

This gap is often filled by non-privatised public companies from the utility/for-profit sector<sup>16</sup> where FBiH and RS are either sole or majority shareholders ('Public Companies'). As such, they often act as sponsors of national sport federations or individual clubs. However, this practise is extremely susceptible to corruption as the Public Companies' policies are highly dependent on which political group is "in control" of them. This is often seen as a vital political and financial resource where such sponsorship/financing agreements are carefully tailored to target certain sports clubs and their agendas.

As stated, the segmentation is even more complex as FBiH cantons have their own sets of sport laws of a general and specific manner where there is no clear strategy. Some cantons will finance the national representative teams, mostly through emergency transfers, to fill the policy and/or financial void left by higher levels of government. In contrast, others will opt for conservative options under the guise of public safety at sports facilities such as banning the selling of alcoholic drinks at sports venues severely limiting sports clubs' revenue streams. However, an hour's drive in

<sup>15</sup> For example the law concerning payment and partial write-off debts of sport entities: Government of Bosnia and Herzegovina. (2021). *O naplati i djelimičnom otpisu dugovanja sportskim kolektivima („Službene novine Federacije BiH“, broj: 37/14)* [Law concerning payment and partial write-off of debts of sports entities ("Official gazette of FBiH" no.37/14)]. Retrieved 1 August from <http://www.pufbih.ba/v1/public/upload/zakoni/23bfc-zakon-o-naplati-i-djel-otpisu-dugovanja-sportskim-kolektivima.pdf>

<sup>16</sup> e.g., power production or telecommunications.

the direction of a different FBiH canton will introduce a completely different set of laws. For example, selling and consuming beer during football matches is legal and attractive for spectators and alcoholic beverage sponsors in one area. However, it is illegal in other areas due to different policies in the context of public safety and prevention of sports-related incidents.

In the context of the National Sports Strategy, the Olympic Committee of Bosnia and Herzegovina (NOC) takes part in its creation. However, even those efforts are challenged by the lack of political will to timely adopt a National Sports Strategy. Perhaps the best illustration of this paradox is the following statement from the NOC: “The Strategy for Sports Development in Bosnia and Herzegovina 2022-2030 is completed, we are waiting for the political mercy for it to be adopted” (StartBiH.ba, 2022b).

To illustrate that point, RS has been paying sports pensions to elite qualifying sportspersons since 2011 of EUR 1,000 monthly. However, such a model is not adopted on the FBiH or national level, creating another asymmetric solution (Jazić, 2020) and favouring talent drain in favour of Croatia and Serbia (Klix, 2022). Therefore, in such circumstances, it is not surprising that the financing of sport remains largely on an ad hoc basis. The lack of systemic solutions prevents the development of a viable and completely self-sustainable revenue-generating sport sector. For example, although the participation of state national teams in international competitions is rarely an issue in Europe, sports federations in Bosnia and Herzegovina often have to request state aid to cover such costs, which very often come at a last minute from sub-national levels (Čaušević, 2022; Vlada Kantona Sarajevo, 2022).

**Participation.** The NOC comprises 40 national sports federations as members, 31 of whom are from Olympic sports (Olympic Committee of Bosnia and Herzegovina, n.d.). In the context of actual numbers of participants, there is no national register or all sports entities and their memberships, with the sole exception of the Ministry of Civil Affairs’ 2020 Register of Sports Organisations (Ministry of Civil Affairs of Bosnia and Herzegovina - Section for Sport, 2020). This register merely lists 26 different national federations, which is less than the NOC’s membership.

Further, national and sub-national statistics agencies do not track sports participation nor the economic value of sport, despite having the relevant ministries dealing with sport policy on those levels. The only exception is the Agency for Statistics of Bosnia and Herzegovina’s annual report *Bosnia and Herzegovina*, which reported sport-relevant values for 2021 (Agency for Statistics of Bosnia and Herzegovina, 2021)<sup>17</sup>:

- online purchases for clothes and footwear (including sports apparel) amounted to 59.5%
- of the broadcasted radio programme hours, 2% were related to sport
- of the broadcasted TV programme hours, 8% were related to sport

However, some specialised thematic reports, such as the 2021 Women and Men in Bosnia and Herzegovina Report (Agency for Statistics of Bosnia and Herzegovina, 2022) stated that there are no

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<sup>17</sup> Note. Other annual reports are available in English while the 2021 report is wrongly linked to the version in Serbian. Other versions in English are available at: Agency for Statistics of Bosnia and Herzegovina. (2021). *Bosna i Hercegovina u brojkama 2021 [Bosnia and Herzegovina in figures 2021]* Retrieved 1 August from <https://bhas.gov.ba/Calendar/Category?id=30&page=2&statGroup=30&tabId=1>

women in chairperson/president positions in any of the top ten most funded Olympic sports federations (European Institute for Gender Equality, n.d.). To be precise, only one in 17 (5.6%) vice-chairpersons/vice-presidents is female, which is well below the European average (cf. Figure 3).



Figure 3. Participation of women in top decision-making roles of sports federations (Source: Agency for Statistics of Bosnia and Herzegovina, 2022, p. 118)

It is indicative that other thematic reports, such as Bosnia and Herzegovina Statistics for Sustainable Development Goals do not even reference sport. This also applies to the context of public health and wellbeing or education. In the context of club and sport specific-participation, it is not surprising that such data is very often not publicly available. This relates to manipulated data to potentially serve various agendas, either to show the numbers as sufficiently low to hide the amount of the actual cashflow, or inflated to reflect the (simulated) size of a sports club when applying for certain funding, such as those of the relevant Public Companies<sup>18</sup>. Some of the national sports federations publish their own statistics. However, their methodologies are not comparable, which makes such reports used only internally. Even when the public sector creates development goals, such as the Development Programming Institute of FBiH, both the start and target values show no data and simply provide plain solutions such as to ‘digitise’ the sport sector through data collection (Government of Bosnia and Herzegovina, 2020).

**Identified issues and negative trends.** The most prominent observable trends in the sports system in Bosnia and Herzegovina can be classified into the following categories:

- 1) lack of proper infrastructure for public or organised sport; the existent infrastructure is often badly maintained, increasing the level of deterioration even for new developments;
- 2) unregulated public access to infrastructure, i.e., inefficient public transport to sporting venues;

<sup>18</sup> The endemic corruption in a non-sport context often permeates the sports context as well and is widely reported upon. For example, the established practises of partly paying out professional players in cash in order to pay less social contributions have not been the subject of any major investigations. For more see articles such as Kaloper, K. (2017, 22 January). (BH. PREMIERSHIP) Transparentnost i profitabilni klubovi, endemi koji ne stanuju u BiH [(BH PREMIERSHIP) Transparency and profitable clubs, endems not found in B&H] *Sport1 Oslobodjenje*. <https://sport1.oslobodjenje.ba/s1/fudbal/premijer-liga-bih/bh-premiership-transparentnost-i-profitabilni-klubovi-endemi-koji-ne-stanuju-u-bih-74557>



- 3) lack of private investment into elite sport<sup>19</sup> as clubs are organised as associations<sup>20</sup>;
- 4) membership in clubs is almost always influenced by (lack of) sporting success and/or availability of private capital through hybrid investment models<sup>21</sup>;
- 5) lack of operational and financial transparency in the sport sector is limiting volunteering at the grassroots level, and beyond, that is clubs are rarely seen as centres of their communities beyond their on-pitch successes;
- 6) obsolete principles in public funding through Public Companies and governmental structures on a local and regional level are prone to corruption;
- 7) lack of know-how in modern sports management limits organic growth;
- 8) lack of social cohesion where some groups will favour sports federations from neighbouring countries<sup>22</sup>; and
- 9) malign influence of sports betting practises has become a major social problem without proper regulation and/or support (market share of 1.6 billion KM and ca. 50.000 compulsive gamblers; Brljavac, 2022).

In the above context, the public opinion within Bosnia and Herzegovina often focuses on the need for more private sector sports investment. It could potentially help its commercial and infrastructural development as the pretext for further legislative action. This is partly true since sports clubs are organised as non-profit associations and any ‘investments’ are very limited. However, the true cause for such market failures is much larger, even outside the context of sport where political instability and inefficient internal systems drive away private investments from other sectors.

With a small and declining population and limited disposable income of the general population, the prospect of revamping the whole sport sector through privatising a handful of professional clubs and/or public venues is an oversimplified and inefficient solution to a much more complex problem.

In the sense of the above, any reform of the sport sector first needs to be preceded by a fundamental reform of the public and judicial sectors which would serve as its bedrock through the public and private sectors.

**Summary.** Therefore, some of the main aspects of the Bosnian sports sector can be marked as follows:

- lack of unified national sport strategy and the related policies;
- unregulated private investment into organised sport and sports facilities; and
- drain of sports talent to other countries (participants and coaches).

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<sup>19</sup> With a very few exceptions, sports clubs in Bosnia and Herzegovina still follow an association model inherited from socialist Yugoslavia. Although the access of private capital is not a guarantee for success, some limited investment opportunities would jump-start some initiatives, e.g. the German 50+1 model. However, direct privatisation of historical clubs would most likely lead to their collapse as the national and sub-national non-sports structures are not robust or corruption-proof enough to enforce a sufficient level of financial and legal oversight.

<sup>20</sup> Although formally everyone can become a club member and take part in its decision making, only one club is democratically organised – NK Čelik Zenica. More information (in Bosnian) at: Nogometni Klub Čelik Zenica. (2022). *Članstvo [Membership]*. Retrieved 1 August from <https://nkcelik.ba/clanstvo/>

<sup>21</sup> Associations are non-profit organisations. Therefore, all profits to so-called “investors” and “strategic partners” are distributed in various illegal ways which are rarely prosecuted.

<sup>22</sup> E.g. A (Bosnian) Croatian youth coach from a club with a Bosnian Croatian majority is likely to recommend a talented young sports person to a Croatian sport federation and not a Bosnian sport federation directly undermining the whole sports system. Therefore, non-Bosniak sports people see the representative teams of Bosnia and Herzegovina only as a secondary option, if any, either due to political reasons or reasons of lack of institutional, infrastructural or financial support.

Coupled with the concerning emigration trend from Bosnia and Herzegovina leading to the decline in population, these issues are expected to increase in the following period unless a systemic legal and political solution is reached for the entire country.

### 5.1.2 Country profile

The Balkan country of Bosnia and Herzegovina is located in Europe's southeast. The economy generates a gross domestic product of 22.5 billion USD annually (The World Bank, 2022b). With 3.3 million inhabitants, this equates to a GDP per capita of 6,916 USD. In 2019, 18% of the Bosnian workforce was employed in the agricultural sector. Hence, they were involved in agriculture, hunting, forestry, or fishing (The World Bank, 2022b). The overall share of unemployment was 15.2 %. The percentage of individuals ages 15-24 without work but available for and seeking employment lies lower at 9.4 % (The World Bank, 2022b). The share of youth not in education, employment, or training is relatively high in Bosnia at 34.6%. In 2019, the rate of individuals above 25 years that completed at least primary school was 49.5% (The World Bank, 2022b). Figure 4 provides an overview of the economic importance of sport in Bosnia and Herzegovina.

## Info sheet on the economic importance of the sport sector and the employment situation

### BOSNIA AND HERZEGOVINA

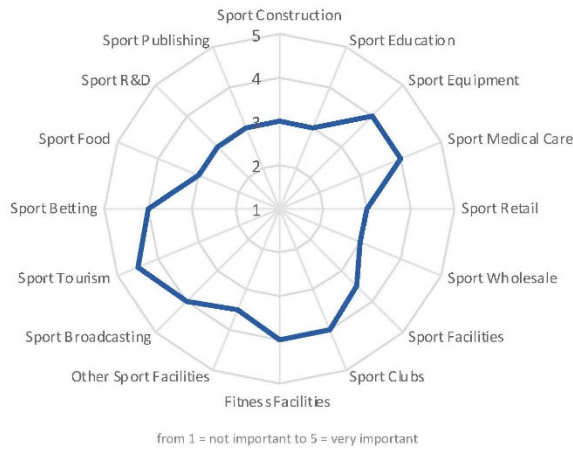


Figure C1-1. Importance of the sport sub-sectors for the economy



Figure C1-2. Country information

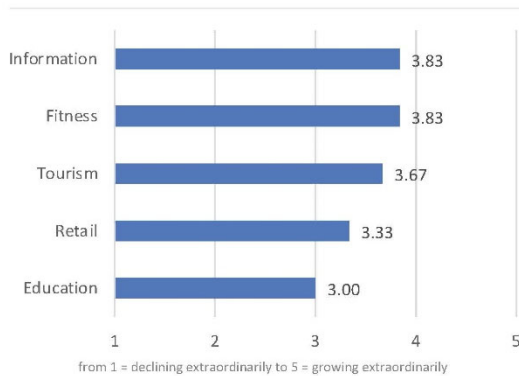


Figure C1-3. Growth potential of the sport sub-sectors



Figure C1-4. Ranked growth potential of sport sub-sectors



Figure C1-5. Ø number of qualified applicants per job opening



Figure C1-6. Difficulty to find qualified employees



Figure C1-7. Importance of the sport sector as an employer

n = 6; Average years of professional involvement in the sport sector (M = 6.0 years)

Figure 4. Economic importance of and employment situation in the sport sector of Bosnia and Herzegovina

The experts described a range of sports sector investments with heterogeneous objectives. Investments in winter sports served primarily commercial goals. Investments of some Bosnian football clubs were geared to increase the quality of their training infrastructure and stadia. Furthermore, one expert stated that more investment goes into developing public sport parks for informal participation. Beyond this, the eSports sector seems to receive substantial investments and has considerable income potential for many individuals. It has been noted that the Bosnian Football Federation is co-financing investments in local community clubs. These investments are used for stadium lighting or the reconstruction of pitches. In addition, 3.5 million KM (approximately 1.8 million USD) were invested in the sports facility in Mostar, and eight million KM (approximately 4.1 million

USD) were invested in an Olympic swimming pool. It appears that the sport retail industry is emerging in Bosnia. One expert described the construction of a new sportswear factory in Jablanica. At the same time, another expert noted that sport equipment has become more prominent.

A range of difficulties in developing Bosnia's sport sector were outlined. Most notably, legal restrictions were mentioned that hinder the development of the sport sector. Closely connected is a lack of government officials and decision-makers who fail to understand sport's importance for the economy and society. Moreover, the lack of funding from public and private organisations was highlighted. Consequently, convincing policymakers and investors to host multi-sport events or fund elite programmes appears challenging.

The lack of government funding and support is an overwhelming challenge across all five sport sub-sectors. Beyond this, the sport tourism sector is confronted with a limited number of available sporting infrastructure and the dire condition of existing infrastructure. A lack of private investments challenges the fitness sub-sector. Moreover, the fitness sub-sector does not find adequately skilled employees. Similarly, the sports education sub-sector requires more private investment and lacks qualified employees. The same challenges can be found in the sport information sub-sector, where private funding and adequate skilled employees are scarce.

The sport sector in Bosnia demands individuals that are trained and employable. One expert claimed that the need for skilled workers is especially prominent in the IT sector, for social media experts and coaches. Moreover, it has been pointed to a decline in employment in the sport sector that results from insufficient government funding. Finally, one expert noted that international collaboration and learning from other countries would benefit Bosnia's sport sector.

The experts outlined a range of large (more than 10,000) sport events hosted in Bosnia during the last five years. Football games are the sport events that most frequently attract large crowds. Beyond this, the European Youth Olympic Festival Sarajevo, some combat sport events or basketball competitions fascinate large audiences. Especially the football match between FC Željezničar and FC Sarajevo seems to be a reoccurring crowd favourite. In the coming years, no major sport events seem to be planned in Bosnia. The experts reported that they are unaware of large-scale sport events, except football games (i.e., champions league matches and national team matches), that will be hosted in the near future (see Figure 5).

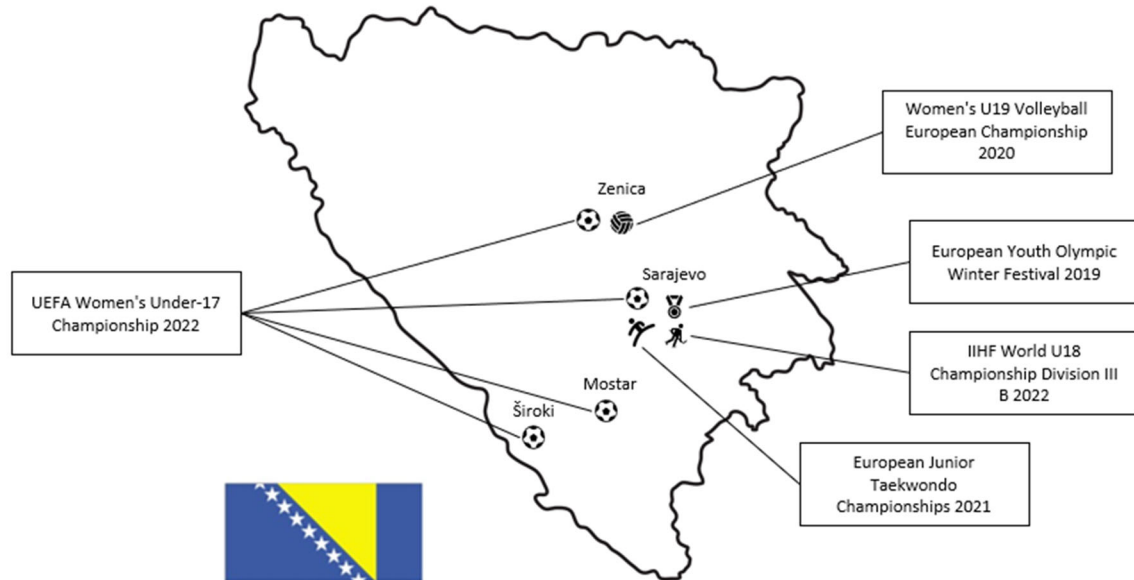


Figure 5. Past and upcoming large-scale sporting events in Bosnia and Herzegovina

### 5.1.3 Social and cultural relevance of sport

According to the interviewee from the voluntary sector, young people in Bosnia and Herzegovina love doing sports. They like traditional sports like football and volleyball, but also like to try other sports, like korfbal and teqball. Combat sports like taekwondo, boxing, and kickboxing are also popular. However, the membership fees for sports clubs can be a factor that discourages many families from letting their children participate in organised sports.

In addition, there is a clear separation between sports practised by males and females. While men play football and basketball, women practise volleyball and athletics. The most promising sports for females are individual sports, such as athletics, swimming, and – to some extent – football. The most dominant female club, SFK 2000 in Sarajevo, benefitted from private investments. According to the interviewee, there seems to be little focus or strategy from the government and sport governing bodies to increase participation and inclusion at the grassroots level. In 2021, Bosnia and Herzegovina hosted the world championships for sitting volleyball. This sport is played at a very high level in the country.

According to the interviewee, physical education in BiH is not up to standard. Furthermore, financing and infrastructure are often lacking, even for elite athletes. For example, the young swimming prodigy Lana Pudar, had no access to an Olympic swimming pool in her hometown Mostar and had to travel two hours to Sarajevo to train at the country's only Olympic pool. Athletes receive little financial support from sports authorities.

### 5.1.4 Economic potential and trends in the sport sector

According to the interviewee, the responsible authorities in charge of sport in Bosnia and Herzegovina do not fully capture the potential of the sport sector and therefore, investment is limited. Between the Ministry of Sport on national, federal, and cantonal level, budgets are scattered and

not aligned to strategic policy. Sport infrastructure is very limited and often derelict. Individual athletes need to support themselves through private means. Even though Bosnia and Herzegovina is a skiing nation, ski and bobsleigh facilities are decayed and are not suitable to attract any tourism at the moment. However, there is potential.

*“But in sport tourism, we can bring a lot because we don’t need to dig more for nature. We have it and we just need to use opportunities” (BIH1VOL).*

As brief desk research has revealed this potential, too. Niche travel agencies offered, for instance, hiking trips to Bosnia and Herzegovina. Almost 40,000 people worked in 2020 in the tourism industry, as outlined by the World Tourism Organisation (2022).

There are currently no Bosnian clubs competing in the UEFA Champions League, which could significantly lift the national football landscape. Overall, the mentality in the sport sector was described as oriented towards short-term goals rather than a strategic investment. More significant investments are often coming from outside Bosnia and Herzegovina, also in the form of EU projects and funding.

On a positive note, there are a growing number of start-ups in Bosnia and Herzegovina. The development started around five years ago, and the Covid-19 lockdowns provided a spring board, as many people were searching for alternative ways to exercise. New technologies, apps and simulators were developed, and people were doing sports from home, for example, riding their home trainers on virtual bicycle tours.

#### 5.1.5 Education and employment

According to the interviewee, there is one good physical education faculty in Sarajevo, which is a public institution. However, education relies heavily on theoretical knowledge and lacks practical sessions due to an absence of facilities. Many PE-teachers and coaches end up unemployed after finishing their university degree, as there are not enough schools and clubs to provide opportunities. This seems to be at odds with schools’ need for more formal physical education.

*“Because our professors and teachers are not people who are coming from the sport. They’re teachers who are finishing faculty for being teachers. There is no division between being a teacher in a sports sector or being a teacher of English. Most of this problem is because the country has no strict curriculum. Once or twice a year, they’re checking the body of the kids, how they’re developing, are they healthy or not?” (BIH1VOL)*

The employment situation in the sport sector is difficult. One factor could be that connections are sometimes more important than skills. Overall, around 80% of sport graduates work outside the sport sector. Some NGOs try to step in and organise workshops and courses for coaches or develop sport diplomacy programmes.

#### 5.1.6 Competencies for the sport sector

An adequate individual competencies profile aids the chances of a successful job application. Ten job ads were analysed to identify which competencies profile is sought after by employers in Bosnia and Herzegovina’s sport sector. Hence, a range of knowledge attributes, skills, abilities, and other competencies was identified (see Figure 6).

## Central competencies for sport sector jobs in

### BOSNIA AND HERZEGOVINA

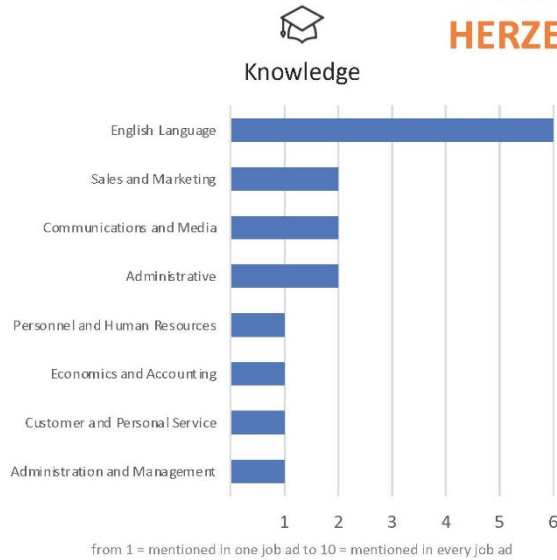


Figure P1-1. Frequency of knowledge attributes in sport sector job offers



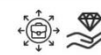
Figure P1-2. Frequency of skill attributes in sport sector job offers



Abilities



Figure P1-3. Number of mentions of abilities sport sector job offers



Other Competencies



Larger font is equivalent to higher frequency

Figure P1-4. Representation of other competencies in sport sector job offers

Ten current (2<sup>nd</sup> quarter 2022) job offers were analysed to assess the required competencies in the national sport sector. The frequencies result from matching the job offers with a set of defined competencies. Job titles of the analysed job offers: Programming director; Retail salesperson; Betsshop attendant; Betsshop attendant; Sports journalist; General secretary; Marketing manager; Youth academy director; CEO of FK Željezničar; Commercial & marketing manager

Figure 6. Central competencies for sport sector jobs in Bosnia and Herzegovina

The analysis convincingly showed that knowledge of the English language is a vital competency employers seek. Six of ten job ads specified that knowledge of the English language's structure and content, including the meaning and spelling of words, rules of composition, and grammar, is required. The analysis did not yield further patterns regarding the knowledge attributes. This might indicate that knowledge attributes are specific to the position or role.

Analysing the required skills for sport sector jobs in Bosnia and Herzegovina indicated diverse requirements. Coordination, the skill to adjust actions in relation to others' actions, was mentioned three times. The remaining skill attributes were either mentioned less frequently or not at all.

The analysis of the abilities indicated that two of the analysed job postings were seeking candidates able to communicate information and ideas in writing so others would understand. The analysis further showed that candidates should be capable of cooperation. Seven of the ten analysed job offers specified that applicants should be pleasant with others on the job and display a good-natured, cooperative attitude.

The country expert reported that job advertisements in Bosnia are still quite old-fashioned and relatively short. This implies that employers do not have to work hard to find potential employees due to high unemployment. In addition, formal requirements are generally valued higher by employers than skills. In other words, a degree may be more critical than skills.

Moreover, the organisational values of employers are rarely shared in job advertisements. It seems that only companies from highly competitive industries like IT include them in hopes that they will gain an edge over their competitors regarding hiring. Due to high levels of the grey economy (i.e., workers are not insured and paid on time) certain work conditions are sometimes advertised as perks (e.g., full reported status or regular salary). A sport industry does not exist per se. Only a handful of other industries active in sport (e.g., retail) are hiring – this results in a limited number of job adverts. Betting companies are huge and tend to exploit their workers. A single worker functions as a betting operator receiving bets, managing administration and stockpiles, serving drinks to patrons and cleaning the premises. Internships or volunteering opportunities are rarely advertised publicly by sports entities.

## 5.2 Colombia

### 5.2.1 National sport system of Colombia (Author: Alvaro Llorente Carreño)

The Colombian sport sector is also known as the Sistema Nacional del Deporte (SND, National Sport System). Law 181 of 1995 introduced the SND and its constituents. Today, the SND comprises several public and non-governmental constituents operating nationwide, regionally, and locally (see Figure 7).



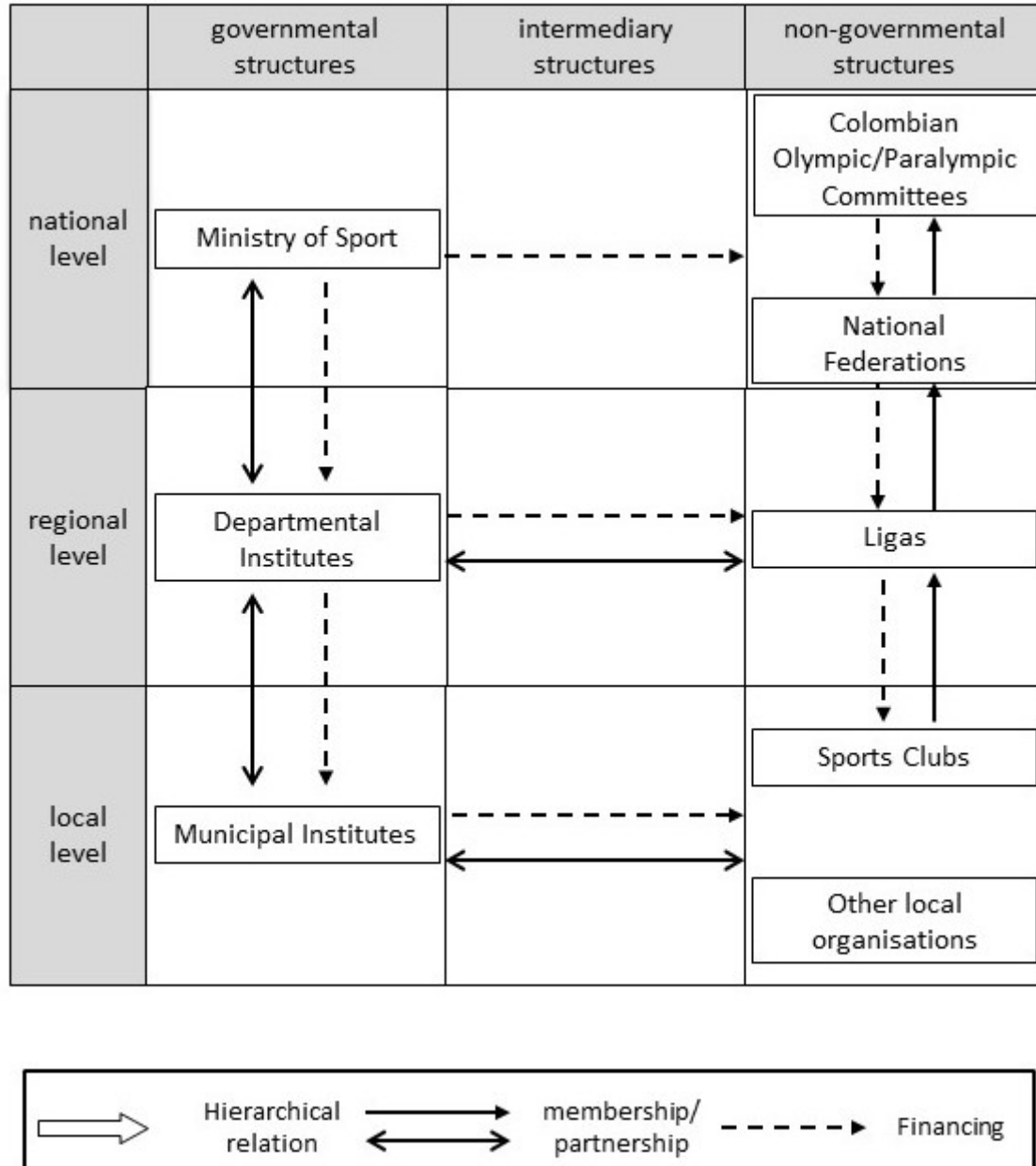


Figure 7. Structure of the national sport system of Colombia

### 5.2.1.1 Public constituents

**Ministry of Sport.** The Ministry of Sport, created under Law 1967 of 2019, is the central government’s supreme body that rules sport in Colombia. Law 1967 of 2019 says that the Ministry of Sport’s mission is to “chart, implement and oversee public policies, plans, programmes, and projects related to sport, leisure, and physical education. The Ministry of Sport’s mission intertwines with public health, education, culture, social cohesion, and foreign relations, allowing for continuous interaction with all public and private stakeholders” (Government of Colombia, 2019). Among its functions, the Ministry of Sport plays a leading role in policymaking of sport and advancing programmes and projects with SND constituents such as the Colombian Olympic Committee, the Colombian Paralympic Committee, the departmental and municipal institutes, the national federations, the departmental & Capital District federations (i.e., Ligas), and the professional clubs.

It is important to highlight that the Ministry of Sport is responsible for managing the ONAD Colombia (Colombia's National Antidoping Organisation) in compliance with WADA's mandates. Additionally, the Ministry of Sport owns a high-performance centre in Bogotá that caters to elite athletes in high-altitude training. Last but not least, the Ministry of Sport oversees the planning, execution and evaluation of various sport events in the country, more notably, the National Games (Juegos Nacionales), in collaboration with regional authorities and with departmental and municipal institutes.

**Departmental institutes (*Institutos Departamentales*).** The departmental institutes are responsible for laying out sport policies in every department of Colombia. Each departmental institute works hand in hand with its respective departmental governors' offices, municipal institutes, and Ligas. The departmental institutes receive assistance (funding, know-how, etc.) from the Ministry of Sport. The Capital District of Bogotá's institute acts as a departmental and municipal institute. Today, there are 33 departmental institutes (including the Capital District of Bogotá's institute) in Colombia (Ministerio del Deporte, 2021b).

**Municipal institutes.** The municipal institutes oversee sport policies and programmes within the jurisdiction of their respective cities or towns. Each municipal institute works in unison with its respective departmental institute on a unified sport management strategy. Locally, the municipal institutes liaise with home-based clubs (both professional and amateur), sport academies, family compensation funds (i.e., Cajas de Compensación Familiar), social clubs, schools, and universities. Meanwhile, the Ministry of Sport is in a position to help municipal institutes advance their sport programmes. It is worth noting that the municipal institutes are instrumental in managing public sport venues in their respective cities or towns.

#### 5.2.1.2 Non-governmental constituents

**Colombian Olympic Committee.** The Colombian Olympic Committee is the highest body that works in the best interest of the organised sport community, namely the national sport federations. Likewise, the Colombian Olympic Committee is the local touchpoint with the IOC and other associations of the Olympic Movement. Most of the Colombian Olympic Committee's revenue comes from the Ministry of Sport. Other revenue streams of the Colombian Olympic Committee are realised through sponsorships (cash and value in kind) and financial assistance from the IOC and other organisations of the Olympic Movement.

**Colombian Paralympic Committee.** The Colombian Paralympic Committee plays a similar role as the Colombian Olympic Committee. The Colombian Paralympic Committee works closely with the International Paralympic Committee and other organisations of the Paralympic Movement, as well as with the national federations that belong to the Paralympic community in Colombia. Similarly, the Colombian Paralympic Committee relies largely on the Ministry of Sport to make it through financially.

**National federations.** The national federations promote and develop their respective sports across the country. Except for the Colombian Football Federation and a few others, most national federations remain tethered to the Ministry of Sport, the Colombian Olympic Committee, and the Colombian Paralympic Committee. While the Ministry of Sport bankrolls directly or indirectly the national federations (through the Colombian Olympic Committee and the Colombian Paralympic Committee), the Colombian Football Federation manages multiple revenue streams. These streams include

sponsorships, media rights, ticketing, and financial aid from FIFA and Conmebol. Today, there are 59 national federations recognised by the Colombian Olympic Committee (Comité Olímpico Colombiano, 2022) and five national federations recognised by the Colombian Paralympic Committee (Comité Paralímpico Colombiano, 2022).

Lastly, nine national youth and leisure associations are not part of the orbit of either the Colombian Olympic Committee or the Colombian Paralympic Committee (Ministerio del Deporte, 2021a). The role of these national youth and leisure associations is to foster well-being and a healthy lifestyle through sport. Some of these associations are the Colombian Association of Mixed Martial Arts, the Colombian Association of Senior Master Cycling, the Colombian Association of Scouts, and the Colombian Association of Tactical Paintball, among others.

**Departmental & Capital District of Bogotá's Federations (i.e., Ligas).** The Ligas run a given sport the same way as the national federations. Unlike the national federations, the Ligas' scope is regional. The Ligas and the national federations are deeply connected, as in most cases, the former constitutes the legislative body or the general assembly of the latter. The Ligas are governed by their general assemblies, comprised of member clubs established in the same region. By nature, the Ligas are formed by a group of amateur clubs involved in elite, competitive and formative sport. While the Ligas get technical assistance from their respective national federations, they land financial support from the departmental institutes.

**Local sports organisations.** The local organisations are at the bottom of the SND's pyramid. These organisations participate in sport at different levels: elite sport, competitive sport, formative sport, and recreational sport. Table 17 shows different sports organisations in a given city or town at different sport levels.

Table 17. Types of sports organisations at different sport levels

Local sport organisation	Elite level	Competitive level	Formative level	Recreational level
Professional clubs	X	X	X	
Amateur clubs	X	X	X	
Academies		X	X	
Family compensation funds		X	X	X
Social/country clubs		X	X	X
Universities		X	X	X
Schools		X	X	X
Health & fitness clubs				X

Outside of the SND, there are other key constituents with a keen interest in sport, including but not limited to sporting goods suppliers, other suppliers, sponsors, media, tourism, professional services (marketing, law, IT, architecture, etc.), NGOs, and other governmental bodies (education, health, culture, labour, finance, industry & tourism, etc.).

### 5.2.1.3 Funding of the SND

There are two types of funding in the Colombian SND: public funding and private funding.

Public funding comes through own resources, budget allocations from central, regional, and local governments and taxes. The Ministry of Sport's annual budget rose from 733 billion COP in 2021

(Ministerio del Deporte, 2021c) to 882 billion COP in 2022 (Ministerio del Deporte, 2022) due to the central government's budget allocations for each year. There are different taxes:

- *Mobile tax.* A 3.5% tax is charged on mobile consumption (before VAT). The central government collects the 3,0% share while the departments and the Capital District of Bogotá collect the 0,5% share.
- *Tobacco tax.* Thirty per cent of the tobacco tax is collected by the departments and goes to the departmental institutes. The current tobacco tax value for a 20-cigarette pack is 2.800 COP.
- *Alcohol tax.* Between 3% and 12% of the alcohol tax collected by the departments and Capital District of Bogotá is awarded to the departmental institutes and the Capital District of Bogotá's institute.
- *Tasa Pro-Deporte (Pro-Sport Rate).* Cities and towns are allowed to withhold up to 2.5% of the value of deals between municipal bodies and contractors. The proceeds go to the respective municipal institutes to fund local sport programmes.

Private funding in the Colombian SND occurs with mainstream revenue sources: ticketing, sponsorship, media rights, licensing, dues, memberships, and donations. However, only professional football clubs can capitalise on a wide array of revenue streams. Not to mention that they can seize more revenue thanks to the transfer fee market. Table 18 provides an overview of revenues.

Table 18. Overview of football clubs' revenues between 2018 to 2020.

2018	2019	2020
570,400,000,000 COP	648,000,000,000 COP	414,400,000,000 COP

Note. The figures for 2018 and 2019 are derived from Superintendencia de Sociedades (2020), the ones for 2020 from Superintendencia de Sociedades (2021).

Aside from professional football, there are no sources that group the amount of private funding in the Colombian SND.

#### 5.2.1.4 Legal framework

Some of the following underpin the Colombian sport sector's legal framework.

**Law 181 of 1995.** The Law 181 of 1995 sets forth the foundations of the Colombian sport sector and defines policies for administering sport with grassroots, schools, the Colombia Olympic Committee clubs, departmental institutes, and municipal institutes (Government of Colombia, 1995). Coldeportes, founded in 1968, was still the central government's highest sporting body and used to report directly, first to the Ministry of Education and then to the Ministry of Culture. Furthermore, Law 181 of 1995 set sports clubs' public financing and governance rules. Not a single sport organisation was eligible to be a for-profit corporation. Several amendments or changes to Law 181 of 1995 have been put in place through other laws or acts.

**Law 1967 of 2019.** On 3 November 2011, Juan Manuel Santos' administration enacted an order (Decreto 4183 de 2011), whereby Coldeportes moved on from the Ministry of Culture Law and became a bureau of the president's office. Afterwards, under Ivan Duque's administration, Law 1967 of 2019 transformed Coldeportes into the Ministry of Sport (Government of Colombia, 2019). With this move, the central government's top sport body gained more political clout with the opportunity to marshalling more financial resources.

**Law 1445 of 2011.** With Law 1445 of 2011, professional clubs, especially professional football clubs, became eligible to operate as public limited companies or corporations (Government of Colombia, 2011). Most professional football clubs saw Law 1445 of 2011 as a milestone for raising more capital and improving internal governance.

**Order 1085 of 2015.** The Order 1085 of 2015, which remains in place and subject to changes, is the executive code that enforces the principles derived from Law 181 of 1995 (Government of Colombia, 2015). Order 1085 of 2015 introduced measures that correspond with the current sport environment in the country. Below are some of the most remarkable features in Order 1085 of 1995:

- Club governance
- Children sport
- Inspection and oversight within the SND
- Paralympic sport
- Ministry of Sport and ONA Colombia's competencies in tackling doping
- Ministry of Sport's mandate to further advance women's sport
- Elite sport management
- Aid programme for retired elite athletes aged 50 years and older

#### 5.2.1.5 Statistics

This section concludes the overview of the Colombia sport sector and is divided into parts: Colombia's satellite account and some sport statistics.

The National Bureau of Statistics (DANE) is set to launch a satellite sport account (DANE, 2022). The project consists of eight main stages:

- Needs analysis
- Design
- Construction
- Data collection
- Data processing
- Data analysis
- Dissemination
- Evaluation

As of today, DANE has completed the first two main stages of the project. Through these two DANE has identified three categories of data that measure the economic activity within the Colombian satellite account:

- Statistic-based sport activities related to sport venue management, sports clubs, and sport learning.
- Supply-based sport activities related to producing sporting goods and other products necessary for playing sport.
- Extended sport activities related to products and services indirectly connected to sport but not indispensable for sport participation.

Elsewhere, the sport satellite account is expected to feed on the following information sources:

- Annual manufacturing survey
- Annual trade and commerce survey
- Civil infrastructure index
- National Bureau of Tax and Customs (DIAN)
- Construction census
- Superintendence of companies (Superintendencia de Sociedades)

The availability of economic data on sports is sparse. Official statistics reveal that sporting goods' impact on national production is also rather small (see Table 19).

Table 19. Overview of the impact of the production of sporting goods on Colombia's economy

	2018	2019	2020
Production of sporting goods in billions	3.806 COP	3.980 COP	2.590 COP
Share of production of sporting goods in the national production	0.22%	0.21%	0.15%

Note. The figures are derived from (DANE, 2021a).

Considering sport participation<sup>23</sup> in Colombia, 11.5% of the overall population exercise daily. Thereby, more men (14.8%) than women (8.4%) are physically active daily (DANE, 2021c). Looking at younger people, a similar proportion is physically active. Considering adolescents aged 5-17 years, the statistics reveal that among those who go to school, 11.8% attend sport sessions after school hours (DANE, 2021b). In this regard, an urban-rural divide is observable. In urban areas, more adolescents practise sports (14.0%) compared to adolescents in rural areas (5.9%).

### 5.2.2 Country profile

The South American country of Colombia is the second-largest country on the continent by population (The World Bank, 2022b). Colombia's 51 million inhabitants generate a yearly gross domestic product (GDP) of approximately 314.3 billion USD. According to the DTUDA (2020) (Danish Trade Union Development Agency, 2020), Colombia has been among the fastest-growing economies in Latin America. In 2019, 15.8% of the Colombian workforce was employed in the agricultural sector. Hence, they were involved in agriculture, hunting, forestry, and fishing (The World Bank, 2022b). The Gini-Index of 54.2 indicates a medium level of economic equality (The World Bank, 2022b). The share of youth not in education, employment or training equates to 27.3% in Colombia. The educational attainment for men is equal to 80.9% and for women, 82.0%. Figure 8 provides an overview of the economic importance of and employment situation in Colombia's sport sector.

<sup>23</sup> The sources quoted in this report regarding sport participation say nothing about the time active sport participants spend every day. However, it was found that a DANE multi-survey in Bogotá and the department of Cundinamarca in 2021 defined 30 minutes a day as the right amount of time for people who actively exercise (DANE, 2021d).

## Info sheet on the economic importance of the sport sector and the employment situation

### COLOMBIA

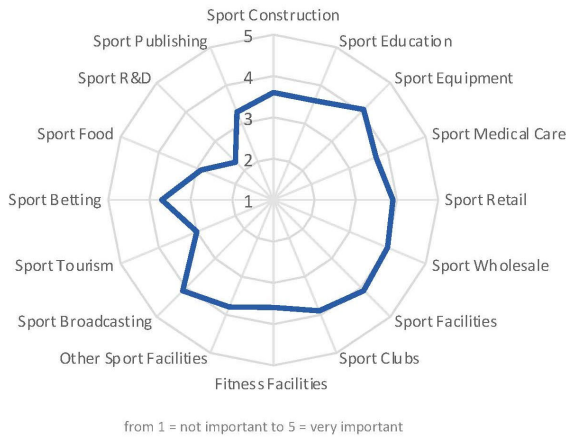


Figure C1-1. Importance of the sport sub-sectors for the economy

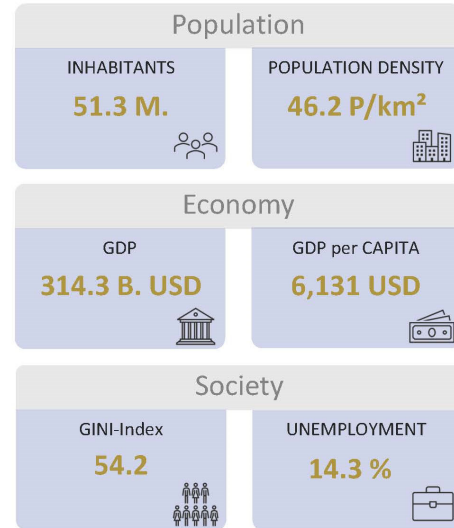


Figure C1-2. Country information

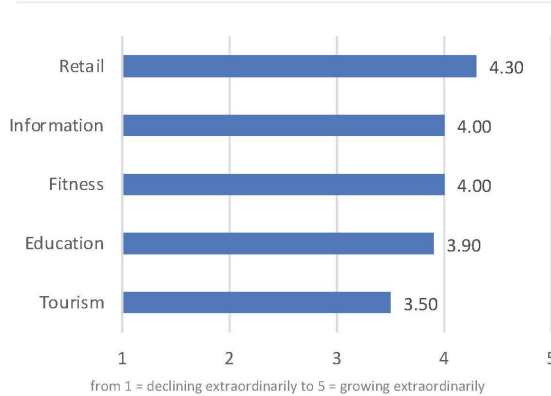


Figure C1-3. Growth potential of the sport sub-sectors

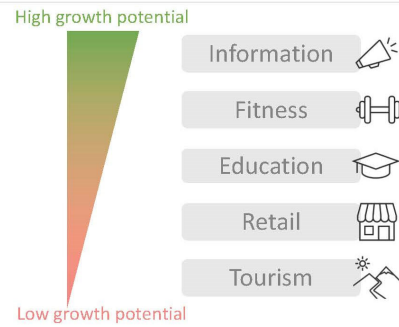


Figure C1-4. Ranked growth potential of sport sub-sectors



Figure C1-5. Ø number of qualified applicants per job opening



Figure C1-6. Difficulty to find qualified employees



Figure C1-7. Importance of the sport sector as an employer

n = 10; Average years of professional involvement in the sport sector (M = 16.0 years)

Figure 8. Economic importance of and employment situation in the sport sector of Colombia

Determining the economic contribution of sport to the overall economy is complex (c.f., Chapter 2). The National Administrative Department of Statistics (DANE) has been working with the Ministry of Sport to design and develop a satellite account to determine the contribution of this sector to the country's economy (DANE, 2022). The project was presented at an event on 13 June 2022, to have a first approach to the statistical operation that will be input for public policy decision-making.

The DANE report estimated the percentage share of production of sports-related products in national output to be 0.21% in 2019. The most prominent contributors are sport construction (26.2 %) and civil engineering (19.9 %; DANE, 2022).

The DANE report further stated that, on average, 11.5 % of Colombians are physically active daily. The share of men that exercise daily is 14.8 %, and the percentage of women is 8.4 %. Moreover, the statistics showed that sport participation is higher in (across gender) urban areas. While 12.5% of men in urban areas are active daily, only 7.9% of men from rural areas exercise daily. A similar pattern can be observed with women (9.4% in urban areas vs 4.3% in rural areas). A comparison between regions in Colombia shows that 43% of individuals in Armenia are physically active during a typical week. In contrast, only 0.3% of individuals from Riohacha are physically active during the week.

The survey participants mentioned that the investments in Colombia's sport sector are stagnant or declining due to the devaluation of the Colombian Peso. Yet, over the last years, a range of investments into the sport sector have been made. For instance, eSport was reported to receive growing support from investors. Furthermore, the management of elite sports teams are professionalising their efforts by investing in the clubs. Similarly, grassroots sports structures are growing through public and private investment. For example, more wellness and fitness clubs have been launched in Colombia. The government invests in local and regional sporting infrastructure, such as multi-purpose sport fields or playgrounds.

The survey participants were asked to identify current trends in Colombia's sport sector. The answers indicated that the importance of personal fitness and the associated health benefits become more apparent to the population. Furthermore, in Norte de Santander, some sport venues have been built. Public-private actions have been implemented to foster cohesion, sustainability, and the involvement of children and adolescents in the sport sector. Additionally, sport betting seems to be on the rise. The sport betting industry can capitalise on the high demand for professional sport in Colombia. It is conceivable that this trend is linked to the influence of significant sport broadcasting channels and the generally high interest in professional sports.

When asked how the development of Colombia's sport sector could be approached, the survey participants revealed a range of ideas. The proposed steps range from large national initiatives, such as combating currency devaluation, to smaller regional infrastructure projects. A lack of transparency in the sport sector and a limited understanding of the sport industry was criticised. This closely relates to the statement that decision-makers fail to understand the complexity of the sport sector. Finally, the fight against corruption is mentioned. Political actors are asked to combat crime to ensure adequate use of funding in the sport sector.

Furthermore, the survey explored the challenges the five sport sub-sectors currently face. Overwhelmingly and across all sectors, the lack of government funding and support poses a challenge to sport development. Beyond this the sport tourism sub-sector is challenged by the bad condition of sport infrastructure. The lack of skilled employees impacts the education sector. At the same time, the information sub-sector deals with a deficiency of private investments.

Finding the right employees in the sport sector is a recurring task that sports organisations face. The survey asked the participants what employment trends they are currently observing in the sport industry. One participant stated that there are very few opportunities for individuals to find



jobs in Colombia's sport sector. In addition, it was noted that open positions are frequently filled through a personal network and not through an official application process. Yet, there appears to be a need for qualified individuals in managerial or administrative positions. One answer stated that postgraduate education heavily relies on study programmes from abroad and that individuals cannot implement the international experience into the Colombian sport sector. Also, increasing demand for tech-savvy individuals was mentioned. The eSports and retailer industry seeks employees capable of systems administration and programming to build their businesses.

Hosting major sport events can positively influence various aspects of a country. Over the last five years, Colombia hosted a range of large-scale (more than 10,000 spectators) sporting events. For instance, Colombia hosted the Copa America Femenina in 2022 in three venues across the country.

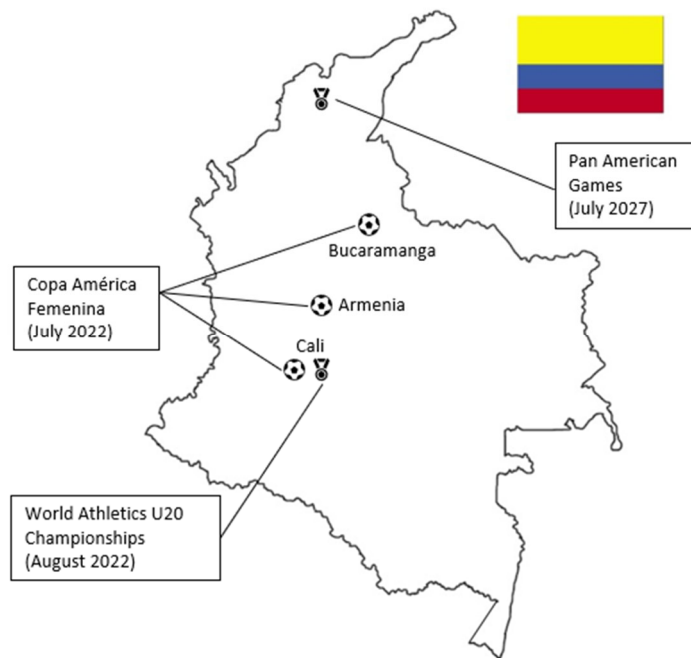


Figure 9. Past and upcoming large-scale sporting events in Colombia

Moreover, the national football league (Categoría Primera A) regularly hosts matches that have high attendance numbers. Other competitions like the world athletic championships or the Central American & Caribbean Games have been hosted in Colombia during the last five years. In the future, the 2027 Pan American Games will be hosted in Colombia. Thus, the sport event sector – closely related to the tourism sub-sector – has good potential (see Figure 9).

### 5.2.3 Social and cultural relevance of sport

Colombia is a sporting nation, with athletes being idols for many young people. All three interviewees confirmed this. Colombians feel proud when their athletes represent their country on the world stage, and young people aspire to emulate them. Football was identified as the most prevalent sport in Colombia. At the same time, cycling has become increasingly popular, partly due to the recent successes of Colombian athletes like Nairo Quintana or Egan Bernall. Baseball also has many supporters in the coastal regions.

While many people will say they are active, participation in sport varies greatly and depends on several factors. For one, there is a divide between urban and rural areas. Interviewees admitted that sport infrastructure in rural areas is often derelict or missing.

While infrastructure is better in urban areas, the second challenge is the high cost preventing people from accessing organised sport in private clubs or gyms. The big income gap in Colombia represents a big challenge to participation in sports such as swimming, cycling, or basketball, as most activities are private and commercial. The interviewee from a private fitness company estimated that around 1.5 million people train in 2,000 private gyms in the whole country. There are initiatives from public authorities to facilitate participation in sport. For example, many Colombian cities close main roads for traffic on Sundays to allow citizens to practise activities, such as cycling, jogging, running, or walking on those public roads. Football is also played in many public places, whether on five-a-side pitches or even on public roads, in parks, and in informal spaces. The role of the government in physical education was critically viewed by some interviewees, as the amount of PE in public schools was reduced in recent years. Moreover, the government closed many sporting facilities during the Covid-19 lockdowns in 2020 and 2021, which led to more criticism.

The third factor in sport participation is gender. For example, the participation rate in football was estimated to be 80% male and 20% female. However, recent developments have seen a professionalisation in football for females, with a domestic league being created and the introduction of a continental elite competition (Copa Libertadores). Lastly, age is another factor for participation. The interviewees described how participation in sport declines sharply after school. For example, many football schools and clubs are available for children and youth. However, there is a lack of offerings for adults.

*“So if you see, we have a lot of participation in football when you are under 15, but after that, no, I don't think that we are very active [...] When you ask people if they are active 50% of the population say that they are active. But when you go deeper in that answer, they say once a month” (COL3FPR)*

Summing up, there is a gap between Colombia seeing itself as a sporting nation and being an actual active nation. For now, passive participation in sport (spectating, watching, following) seems bigger than active participation in sport and physical activity. This gap was also described as an opportunity and potential for growth.

#### 5.2.4 Economic potential and trends in the sport sector

The political framework in Colombia is such, that the Ministry of Sport is a very young ministry. According to one interviewee from the private sector, the government has not been investing much in grassroots sports so far. However, by establishing the Ministry of Sport (formerly known as Coldeportes) in 2019, the government raised the importance of sport on the national agenda. It introduced targets for elite and grassroots development. Another interviewee stated that local politicians are involved in developing sport. The interviewee referred to the example of Bogota, where local politicians attempt to make the city the leading sports city in Colombia and Latin America. Recently, a law was passed to give tax breaks to individuals or organisations who financially support athletes.

Several challenges to the sport sector were mentioned. These referred to the current macroeconomic environment. The inflation, devaluation, and recession made sporting goods' imports significantly more expensive. It gave people less disposable income to spend on sports-related activities. Another challenge identified was corruption, especially concerning the rapidly growing sub-sector of sports betting. In addition to the success of sport betting, the current trends and developments in the Colombian sport sector were identified as follows.

The professionalisation of the football market is continuing rapidly, with the close involvement of broadcasters and sponsors working with the leagues and event organisers. According to one interviewee, the Colombian men's league is now in the TOP 10 of the world's football leagues. The women's game is also starting to become more organised and professional. Thus talented players will be incentivised to stay in the domestic league rather than leaving to play in other American or European leagues.

Sport equipment was an area that saw a rise in sales during the Covid-19 pandemic in 2020 and 2021. However, with the end of lockdowns, these numbers went down to pre-pandemic levels, representing around 100 million USD per year. A similar development was registered in sport retail. Private and public-private joint ventures are developing sport infrastructure and facilities. Especially in Bogota, new facilities are built. One interviewee pointed out the considerable potential of the fitness industry, currently estimated at one billion USD per year. The current level of gym membership penetration in Colombia is 3%. At the same time, other countries in the region, such as Mexico, Brazil, or Argentina, have a penetration rate of 6%, leaving the potential for significant growth in this sub-sector. Another interviewee from the public sector pointed out the potential of sport tourism. Colombia has mountains and coastlines that allow for sports such as paragliding, kite surfing, cycling, and hiking. They pointed out that the Ministry of Tourism is working on promoting sport and eco-tourism.

*“And there is for me there the most important thing that Colombia can do in the next ten years has to do with sport tourism” (COL1PUB).*

Based on brief desk research, anecdotal evidence revealed that several travel agencies in Germany and Austria offer hiking trips to Colombia. Another outdoor sport offered for tourists is surfing. Thus, these examples emphasise the importance of the tourism sector – although the survey respondents did not consider it to have high growth potential.

Another strong sub-sector in Colombia mentioned was sport medicine. Colombia owns one of only three anti-doping laboratories in South America, run by the Universidad Nacional. Two interviewees mentioned broadcasting as a strong sub-sector with potential for further growth.

### 5.2.5 Education and employment

On the one hand, the government cut physical education from three hours per week to one hour per week in public schools. On the other hand, there is a plan to develop “Escuelas Deportivas”, meaning public sport schools where children practise different sports disciplines from a young age. Most degrees in higher education focus on physical or sport education, sometimes called physical culture. While private fitness instructors did not have formal certification for a long time, a new law was passed recently. It outlined that fitness instructors will have to obtain official certification to practise their profession. The private university PRIME Business School - Escuela de Negocios de la

Universidad Sergio Arboleda started a sport management degree, which was the first of its kind in Colombia. So far, it has remained the only one.

The interviewees describe the sport sector in Colombia as a relatively closed sector. Employment opportunities at sport federations or leagues are not easily accessible without the right network. In organised sport, player agencies, and sponsors of football clubs and leagues were mentioned as potential employers for young graduates. Required skills for working in the sport sector were mostly listed as soft skills. Interviewees mentioned a positive attitude, service mentality, passion, good leadership, networking, social skills, and communication skills.

*“I think most basic of all would be to be really passionate about the sports and they have to want to build on the sport [...] as I mentioned to you, it is a very close sector. So you have to be good at networking [...] have to be good with social skills, good at communicating yourself” (COL2FPR)*

Other qualifications were related to knowledge such as accounting, marketing, or IT skills. In recent years, health and fitness clubs have struggled to retain personal trainers and other staff such as designers and advertisers, since the market is quite competitive. Besides, opportunities to work independently or from home have grown through the Covid-19 pandemic. The biggest challenges in the current job market for employers were identified not so much as a lack of specific skills but mostly the high bargaining power of employees. Private sector employers mentioned a lack of long-term commitment from candidates, expectations for the home office, and a high turnover of staff.



### 5.2.6 Competencies for the sport sector

Adequate individual competencies can enhance the chances of success when applying for a job in the sport sector. Competencies combine knowledge, skills, abilities, and other competencies. In Colombia, various job offers were analysed to identify the leading competencies employers in the national sport sector seek. Nearly half of the analysed jobs required knowledge of sales and marketing, English, and administration and management. Expertise in sales and marketing can be further specified as the ability to show, promote, and sell products or services. Hence, applicants should know how marketing strategies, tactics, product demonstration, and sales techniques work and how to evaluate them (see Figure 10).

## Central competencies for sport sector jobs in

### COLOMBIA

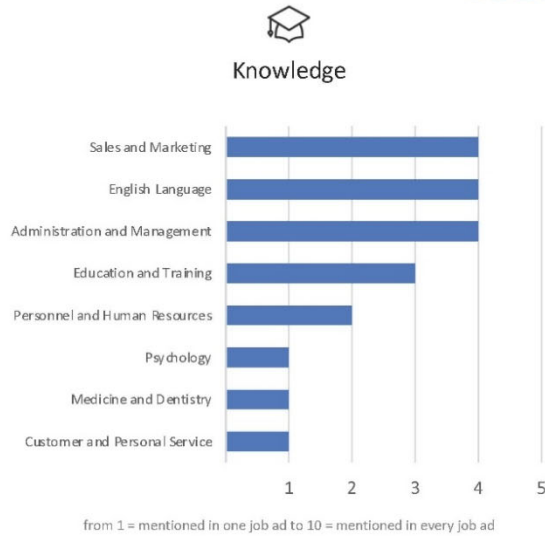


Figure P1-1. Frequency of knowledge attributes in sport sector job offers

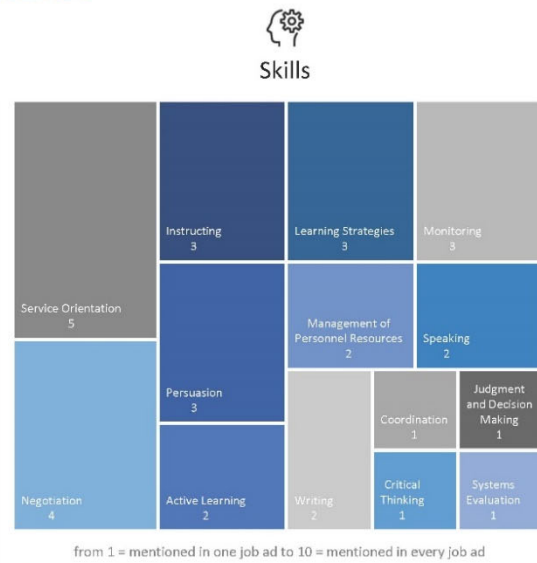


Figure P1-2. Frequency of skill attributes in sport sector job offers

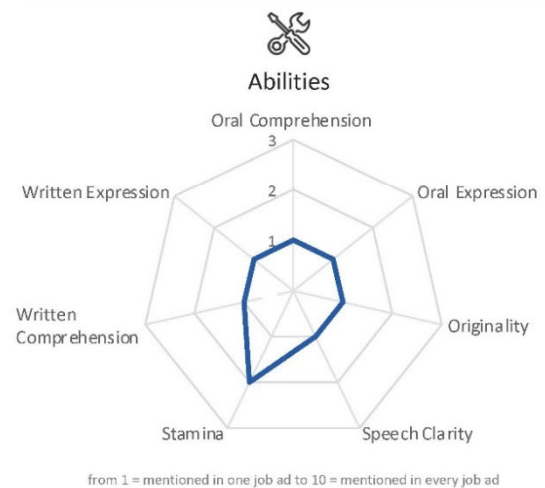


Figure P1-3. Frequency of ability attributes in sport sector job offers



Figure P1-4. Representation of other competencies in sport sector job offers

Ten current (2<sup>nd</sup> quarter 2022) job offers were analysed to assess the required competencies in the national sport sector. The frequencies result from matching the job offers with a set of defined competencies. Job titles of the analysed job offers: Manager Learning & Development; Bodytech Specialised Trainer; Sport Coordinator; Head of Business Development – Programmatic and Media Sales; Basketball Coach; Sales Assistant; Procurement Manager Sport and Outdoors Category; Lead Football Manager; Fitness Instructor; Business Executive

Figure 10. Central competencies for sport sector jobs in Colombia

Furthermore, knowing the English language with its grammar, rules of composition, and spelling aids the successful application in the Colombian sport sector. Finally, knowledge of administration and management is required. In other words, potential job candidates should know business and management principles and have insights into strategic planning, resource allocation, human resources, leadership, production methods, and the coordination of people.

Service orientation and negotiation skills appear vital in Colombia's sport sector. Half of the analysed job ads seek employees actively looking for ways to help people. Furthermore, 40% of the

analysed job ads specifically required employees who can bring others together and try to reconcile differences.

No clear pattern of individual abilities emerged. Two of the analysed jobs were looking for candidates with stamina. However, this is unlikely an ability that promotes successful applications across the Colombian sport sector. Other wanted competencies were relationships and achievements. Hence, candidates should be capable of teamwork and building and maintaining a friendly, non-competitive environment. Occupations that satisfy this work value are results oriented and allow employees to use their strongest abilities, giving them a feeling of accomplishment.

## 5.3 India

### 5.3.1 National sport system of India (Author: Mridul Kataria)

India's sport system has gone through various processes that have culminated into what it is today. From 1947 to 1982, the governance structure was not well-defined. It was only after 1982 when India hosted the Asian Games, that a specific department on sports was founded (Mallikarjun & Vijakumar, 2016). The Department of Sports later evolved into an established Ministry, labelled the Ministry of Youth Affairs and Sports (MYAS) in 2000 (see Figure 11). A Department of Sports was established under it to separate the Youth Affairs section. Further, the Department of Sports is now divided into two sections – Sports Bureau (handling all the programmes) and the International Sports Division (handling infrastructure; Chelladurai et al., 2013). The MYAS focuses on enabling the growth of the sport system as a whole, empowering intermediary and autonomous bodies in multiple ways.

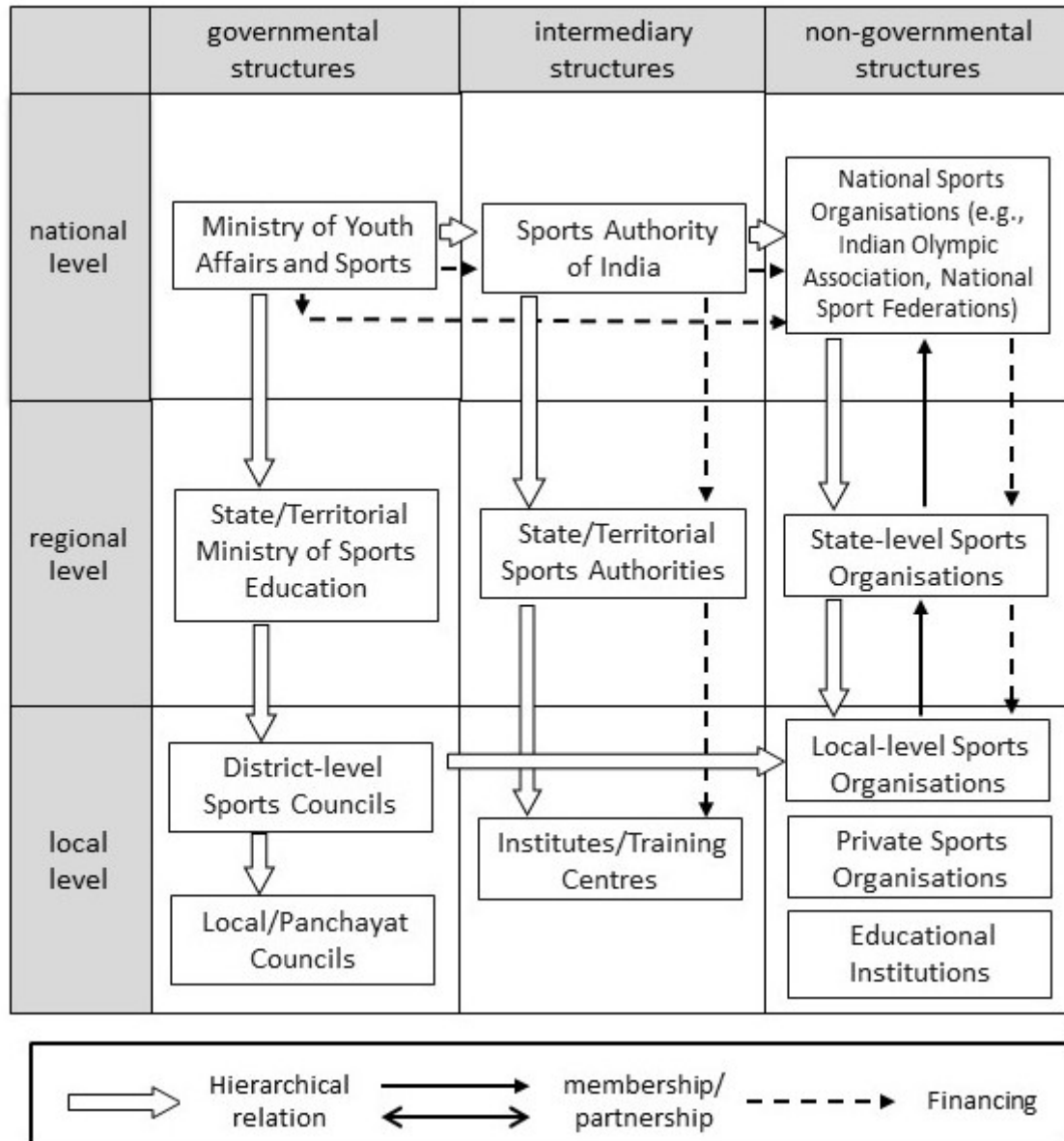


Figure 11. Structure of the national sport system of India (adopted from Chelladurai et al., 2013)

Besides, the Sports Authority of India (SAI), established under the Department of Sports in 1984, was inaugurated. SAI is an autonomous body under the MYAS that works towards sports development and achieving sporting excellence (Sports Authority of India, 2022). The SAI runs its training centres and academies. It also collaborates with private sports organisations on multiple training programmes for athletes, like the Target Olympic Podium Scheme (Sports Authority of India, 2022). Simultaneously, it also grants recognition, support, and funding to National Sport Federations (NSF) as recognised by the Olympic Charter. However, the Indian Olympic Association (IOA) funding comes directly from the MYAS (Government of India, 2011). The SAI is a key player in supporting the growth of sport programmes from the grassroots to the elite level while working in consonance with sports organisations to ensure the sustenance of all sports and supporting indigenous, non-organisation-led sports.

At the national level, the IOA and all the NSFs function as non-governmental bodies, as defined by the IOC charter. However, they have politicians in leading positions, which has been cited as a



source of inefficiency and corruption (Kumar & Sabu, 2015). While numerous Olympic-recognised sports receive government support, a unique exception to this rule is Cricket. The Board of Control for Cricket in India (BCCI) functions as a wholly private body, organising its funding and revenue (Krishna, 2019). The IOA and NSFs are further responsible for sports promotion and development within the country, as well as recognising athletes to send for international competitions (Indian Olympic Association, 2022). They further coordinate the activity at the state and local levels with the respective state sports organisations (Indian Olympic Association, 2022). Subsequently, they coordinate all district and local-level sports events and competitions.

The country also has a thriving culture of educational institutions involved in sports, preparing students for local, regional, and national sports events. While some government schools receive this support, numerous private schools and universities also engage students in organised sports alongside private academies. These are all unified under sporting codes formed by education boards like the Central Board of Secondary Education (PricewaterhouseCoopers, 2019).

This top-down approach has multiple shifts along the same hierarchical levels. Nevertheless, in general, the sporting ecosystem in India is heavily guided by the government, with more recent developments allowing for the private sector to be involved in the process.

### 5.3.2 Country profile

The Republic of India is located in South Asia. India is the seventh-largest country by area and the second most populated place. With over 1.4 billion inhabitants, India generates an annual GDP of 3,173 billion USD. India is not only one of the largest economies but also one of the largest growing economies in the world (Nayak et al., 2010). The gross domestic product per capita is 2,277 USD (The World Bank, 2022b). In 2019, 42.6% of the India workforce was employed in the agricultural sector. Hence, they were involved in agriculture, hunting, forestry, or fishing (The World Bank, 2022b). The service sector makes up 26.3% of the country's GDP (Nayak et al., 2010). The Gini-Index of 35.7 indicates a relatively equal level of income distribution. India's sport sector is estimated to be between 480-620 billion USD. This estimation stipulates that the sport sector contributes between 1 to 5% of India's GDP (The Diplomat, 2016). However, sport is not generally recognised as an economic sector in India. Figure 12 gives an overview of the economic importance of sport in India.

## Info sheet on the economic importance of the sport sector and the employment situation

### INDIA

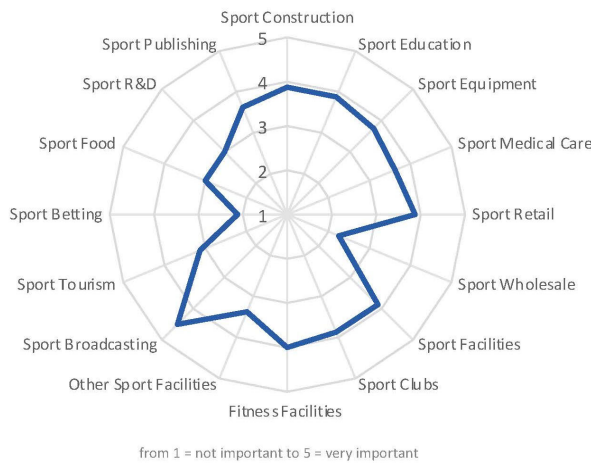


Figure C1-1. Importance of the sport sub-sectors for the economy

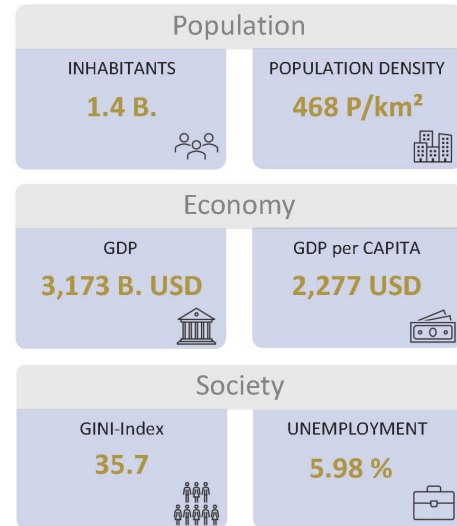


Figure C1-2. Country information

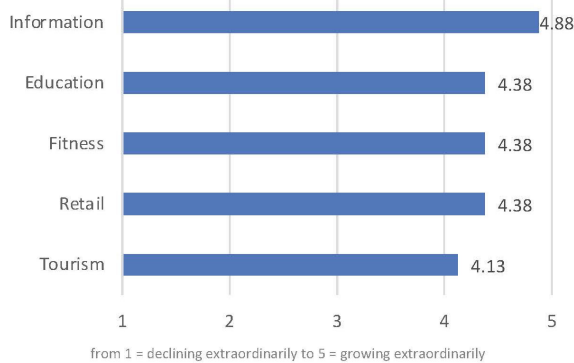


Figure C1-3. Growth potential of the sport sub-sectors

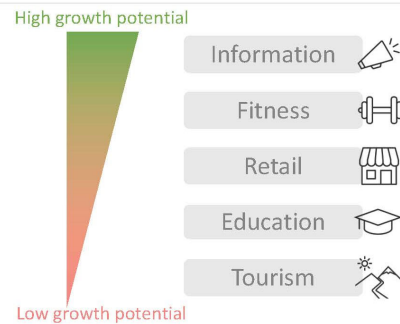


Figure C1-4. Ranked growth potential of sport sub-sectors



Figure C1-5. Ø number of qualified applicants per job opening



Figure C1-6. Difficulty to find qualified employees



Figure C1-7. Importance of the sport sector as an employer

n = 8; Average years of professional involvement in the sport sector (M = 11.1 years)

Figure 12. Economic importance of and employment situation in the sport sector of India

The survey participants described a range of trends that they can observe in India's sport sector. First and foremost is the observation that other sports (next to cricket) are gaining popularity. This increased popularity of other sports is further linked to growing participation among men and women. Moreover, private investments in the sport sector boost the professionalisation and the diversification of India's sport landscape. For instance, the success in the last decade has enabled

sports like volleyball, football, or kabaddi to develop professional structures. Investments from private institutions or individuals enable sports organisations to rely less on government funding and public policy. Overall, the experts reported that the magnitude of private investments is growing significantly. In particular, fantasy sports/gaming and eSports have received huge private investments over the last few years. India has been trying to overcome the robust and outdated policies in government investments in sports by encouraging the private sector to invest in it. Beyond this, government funding has also increased over the last few years. One expert stated that government spending on sport will increase by approximately 20% in the coming years.

However, the experts outlined a range of difficulties that limit the development of India's sport sector. For one, the government's lack of a systematic and structured approach was mentioned. This appears to be closely linked to a lack of a structured approach to developing grassroots sport. One expert noted that the sport federations' administrators and leaders lack the required qualifications. Hence, the government is heavily involved in federation procedures. The sport investments are predominantly aimed at highly-visible, event-centric, and high-performance sports. Consequently, grassroots sport is underfunded. Grassroots sports further struggle with a lack of infrastructure or poorly maintained sporting facilities.

Looking at the challenges of the sport sub-sectors, it becomes apparent that the tourism sector lacks government support and funding. Moreover, the bad condition of the existing infrastructure limits the potential of sport tourism. Similarly, the sport education sub-sector severely lacks skilled employees and government support, as the experts pointed out.

Regarding employment in the sport sector in India, the experts noted that many young individuals are trying to obtain full-time positions through volunteering. One expert noted that introducing professional leagues attracts more graduates to seek employment in the sport sector. Moreover, sport management and journalism degrees are becoming increasingly popular in urban areas. Nevertheless, many entry-level positions in the sport sector are low-paid, and mid-level positions are predominantly filled internally.

A range of large-scale sport events (more than 10,000 spectators) will be hosted in India. Most notably, the annual final of the Indian Premier League in cricket. Yet, also regular-season cricket games frequently attract many spectators. Beyond this, the FIFA U-17 Men's World Cup 2017 and the Men's Hockey World Cup 2018 were hosted in India (see Figure 13).

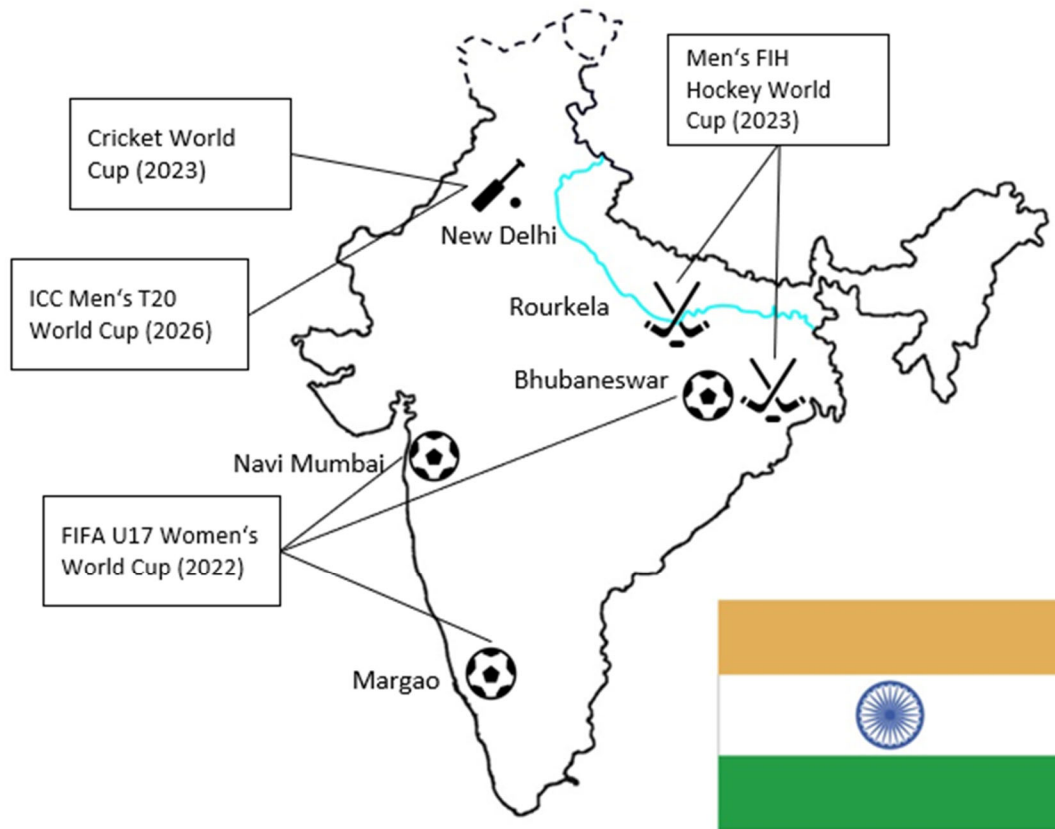


Figure 13. Past and upcoming large-scale sporting events in India

The survey participants outlined some projects which they believe have the potential to gain track in the following years. For instance, establishing more professional sport leagues allows for more fan engagement. Beyond this, sports betting, fantasy sports, and broadcasting are high-potential sectors. Moreover, the fitness sector receives substantial private investments, which could amplify its development in the future. This growth taps into a growing urban market with more health and fitness concise individuals. Also, the use of personal fitness and exercise equipment increases. Finally, one expert mentioned that women's cricket and the upcoming world cup in women's cricket promise to be a success.

### 5.3.3 Social and cultural relevance of sport

The five interviewees from various areas of the sport sector confirmed that India is a cricket-crazy country. Cricket is by far the most played, watched, followed, and commercialised sport in India, with the Indian Premier League as the sport's flagship since 2008. Other popular sports include football, badminton, tennis, kabbadi, hockey, and golf, with different levels of participation and popularity. The sport of kabbadi has seen a big increase in popularity and commercialisation, with the top athletes becoming well-known celebrities. Especially during the Covid-19 lockdowns, the digital consumption of sports programmes played an immense role.

While in the past, sport was mainly viewed as a pastime or luxury to engage in, the interviewees described a recent shift in mindset amongst Indian society. For many years, there was a strong focus on academic excellence for youth. Therefore, only the most outstanding athletes pursued sporting

excellence. However, in recent years, sport participation has been given more importance to children's development, and parents are more supportive of their children taking up sports. The last 20 years have seen a rise in recreational participation, with the opening of clubs and gyms all over the country.

Participation of women in sport has also been increasing. However, there is still a lack of infrastructure and safe spaces for women and girls to participate. Public authorities offer different campaigns encouraging girls' participation in various sports. For example, Maharashtra, one of the largest states in India, has run a campaign called 'Go Girl'.

*“So that's something in terms of safe spaces that also exist in India, but yes, there is a lot more improvement from what used to be, say 10 years back to what it is now, but is it enough? No, a lot more needs to be done.” (IND3VAR)*

Over the last 10 years, the government has made sport a national priority. It has initiated various programmes for talent development, such as the Target Olympic Podium Scheme. The state of Odisha uses sport as a tool to promote social goals, fitness, and physical literacy. Overall, India seems to be steadily shifting from a spectating to a participating sport nation, with government bodies, NGOs, and private companies investing heavily at different levels of the sporting pyramid. In summary, there seems to be a cultural shift from a single sporting nation to a multi sporting nation, extending the mindset of excellence and performance to a broader vision of sport.

#### 5.3.4 Economic potential and trends in the sport sector

While venue construction has been growing for major events, such as the FIFA U-17 Men's World Cup, infrastructure is a challenge in terms of and access to quality public facilities. Private investors such as the corporations JWS Sport and GMR Group play a major role in financing and running professional sports. Again, cricket attracts the most significant deals in the sport sector, up to 100 times that of other sports.

Broadcasting plays a significant role in the growth of many sports, as they are closely linked to setting up new leagues and formats. This means they not only come in as broadcasters but also as equity holders who drive the model and marketing of the leagues. This has been the case for cricket and football, for example. After a long period of a duopoly in Indian broadcasting, there are now more players in the broadcasting market, such as STAR (owned by Disney), Sony, and Reliance – some of whom have launched sports channels.

*“At the end of the day, sort of BCCI, everyone else is the governance layer, but the real commercial layer, the money is coming from broadcasters who are predicting advertising rates, markets consumption, digital growth, other things like that. So I think no story would be finished without the history of broadcasting in India” (IND4PUB)*

The interviewees pointed out that sports equipment manufacturing was a sub-sector with potential, as it could be done at an industrial scale in India. With India being a technology hub, interviewees saw natural advantages for digital consumption and virtualisation of sports, sports analytics and measurements. Esports, fantasy leagues, and gaming were also mentioned as interesting growth markets. According to one interviewee, the entrepreneurship and start-up culture is very prominent in India and represents an enormous potential for the sport sector.

Sport tourism also offers some potential – for active and passive sport tourists. Cricket events could be better promoted to foreign sport tourists. Concerning active sport tourism, Ladakh is well-known for hiking, and many travel agencies offer tours there, as desk research revealed. Moreover, running events are also popular, particularly the marathon in Mumbai. However, considering the size of India, more opportunities could be promoted.

While it is very difficult to make blanket statements about a country as vast and populous as India, the overall sport sector seems lively and growing in several sub-sectors. There seems to be a lot of activity from public and corporate actors.

### 5.3.5 Education and employment

In theory, all schools must offer physical education at least 30 minutes twice a week as a basic standard. However, reality often differs from theory. According to one interviewee, surveys like the AIC and RIS report showed that the state of sport facilities at schools is quite bleak. The existence and quality of playgrounds, the capacity in terms of equipment, and the knowledge capacity of PE teachers is something to be improved, according to interviewees. Also, the ongoing education and support of talented athletes between the ages of 13 and 20 is something that was pointed out as lacking, as it is mostly left to private academies to do this work.

At the university level, more sport management programmes have been established in recent years, as well as sports law courses. The Global Institute of Sports Business India (GISB) in Mumbai calls itself India's Premier Sports Management Institute. It offers courses in Sport Management, Sport Education, and Sport Management Education. Also, collaborations with foreign institutes have been established, for example, the AISTS from Switzerland and the University of Birmingham have created Master's programmes in India.

*"I think of late, there are a lot more Master's programmes, there are some degree courses that allow you to really graduate with a fair amount of knowledge and exposure to the sports industry before you can get your first job or whether you can upskill and get into a higher position. So, there are lot more opportunities now than there were four or five years ago" (IND2FPR).*

One interviewee pointed out that specific education is still the exception, as many leaders in the sector come from non-sport backgrounds. Another interviewee mentioned that modules need to be more structured, with specialisations in management, event management, sports science, sports law, and finances and accounting as generic sport management courses are insufficient. The overall trend seems to be that sports organisations require more specialised competencies, combined with a knowledge of the sport environment. These can be experts from other fields coming into sport, or former athletes training to acquire suitable skill sets for a specific role. International exposure was also mentioned as an important factor for potential employers. One interviewee stated the importance of major sport events and leagues as a catalyst for employment in the sector.

*"[...] and we didn't have the kind of experience. Then the first Indian Premier League (IPL) happened, that was in India. We had 90% people who came from abroad; the second year went out, the third year again we had about 75%. Today, it's done completely in India." (IND1FPR)*



Employment opportunities for graduates are provided by broadcasters, government institutions, sport consulting firms, multinationals, sports agencies, public relations, and marketing companies. Moreover, sport events provide seasonal employment. However, the job market does not accommodate everyone who wishes to work in the sport sector. Passion for sport is insufficient to convince employers looking for specific competencies sets for their operations. Private providers like Sporjo are offering support in connecting candidates to appropriate job opportunities or taking part in upskilling programmes.

### 5.3.6 Competencies for the sport sector

Successfully applying for a job in the sport sector requires individual competencies that are specific to the job. Analysing ten job offers, a set of commonly requested knowledge attributes, skills, abilities, and other competencies were obtained. Thus, individuals seeking employment in India's sport sector can be advised to develop the following competencies (see Figure 14).

## Central competencies for sport sector jobs in

### INDIA

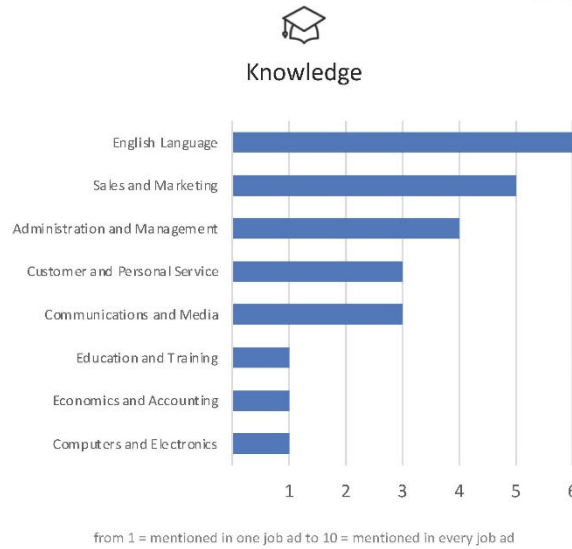


Figure P1-1. Frequency of knowledge attributes in sport sector job offers

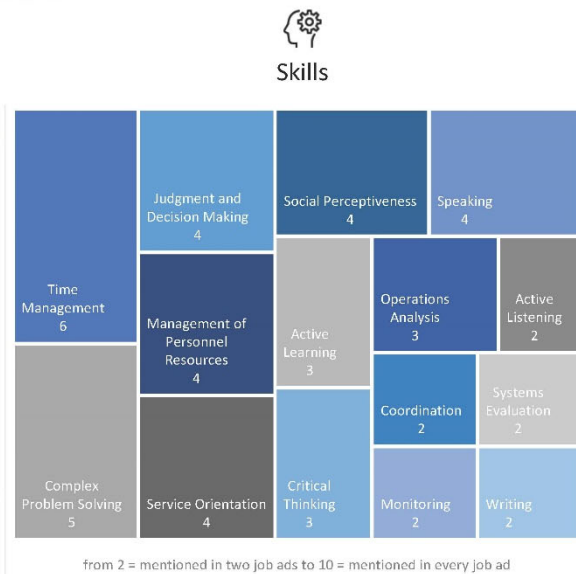


Figure P1-2. Frequency of skill attributes in sport sector job offers

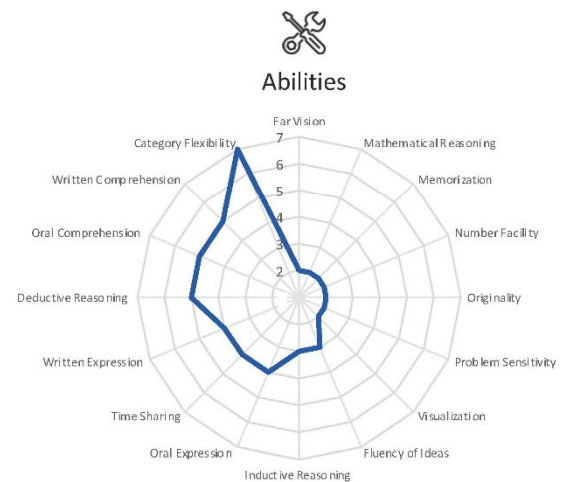


Figure P1-3. Frequency of ability attributes in sport sector job offers



Figure P1-4. Representation of other competencies in sport sector job offers

Ten current (2<sup>nd</sup> quarter 2022) job offers were analysed to assess the required competencies in the national sport sector. The frequencies result from matching the job offers with a set of defined competencies. Job titles of the analysed job offers: Manager, Sales Team sport, PUMA Group; Basketball Operations Lead - NBA India; Manager, Video Content Social Media Lead (Esports), Rooter; Sports Commentator, OneCricket; Management Trainee, AllSport; Sport Leader, Decathlon India; Sports and Performance Psychologist, Reliance Academy; Chief Technology Officer, upUgo; Associate- Public Relations (Sports), Zeno Group

Figure 14. Central competencies for sport sector jobs in India

Six of the ten analysed job offers stated that English was a key knowledge attribute for applicants. Hence, individuals ought to know the English language's structure and content, including the meaning and spelling of words, rules of composition, and grammar. Furthermore, half of the analysed job offers seek employees with expertise in sales and marketing. In other words, applicants should know the principles and methods for showing, promoting, and selling products or services. This includes marketing strategy and tactics, product demonstration, sales techniques, and control systems.



Regarding skills, job candidates in India are well advised to acquire time management skills, as more than half of the examined jobs require this. Moreover, according to the analysis, complex problem-solving is a valuable skill. Consequently, individuals should be able to identify complex problems and review related information to develop and evaluate options and implement solutions.

The individual ability of category flexibility stands out, as 70% of the inspected job ads are explicitly looking for individuals with this ability. Hence, job aspirants should be able to generate or use different rules for combining or grouping things differently. Moreover, half of the job postings expect individuals to be capable of deductive reasoning, oral comprehension and written comprehension. Consequently, individuals must apply general rules to specific problems to produce answers that make sense, listen to and understand information and ideas presented through spoken words and sentences, and read and understand information and ideas presented in writing.

The analysis further presented other relevant competencies. Most notably, individuals should value result-oriented work values while using their strongest abilities. Moreover, independence, attention to detail, and effort are valued competencies by employers in India's sport sector.

## 5.4 Ivory Coast

### 5.4.1 National sport system of the Ivory Coast (Author: N'dri Affre Dany Romaric)

The organisation of sports in the Ivory Coast is the government's responsibility through the Ministry of Sport. The government supports and supervises, in respect of the rules of autonomy and independence envisaged by the international sporting movement, the activity of the legal entities having for objective the practice of the sport, and the organisation of competitions with a national or international character. Figure 15 summarises the main actors in sports.

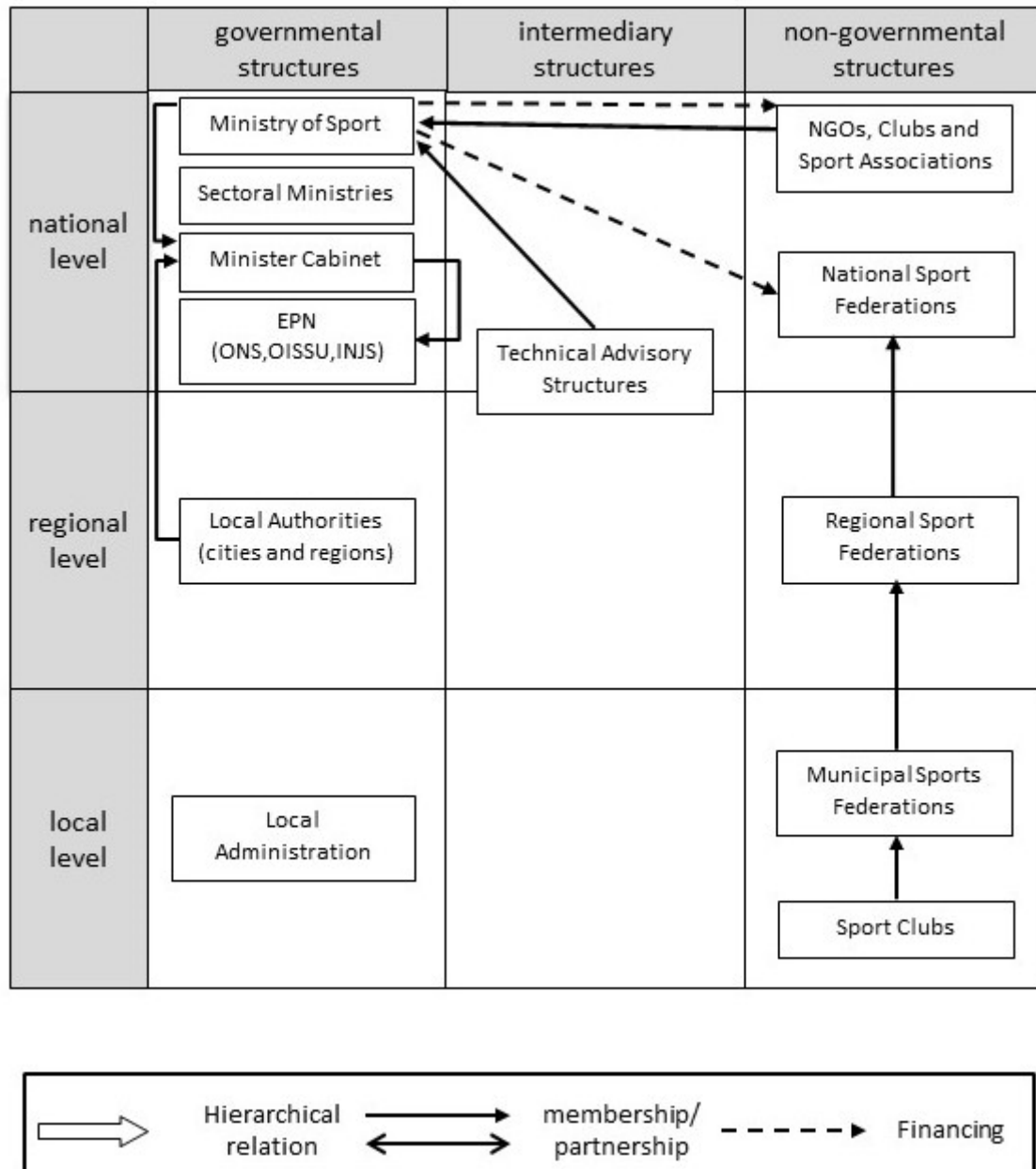


Figure 15. Structure of the national sport system of the Ivory Coast (adopted from PricewaterhouseCoopers, 2020)

In 2016, the Ministry of Sports adopted a National Sports Policy (NSP) for 2016-2020. This policy focused on sport as a socio-political, socio-economic, and socio-cultural issue. It aimed to improve the well-being of populations, professional integration, social cohesion, wealth creation and influence of the Ivory Coast (Government of the Ivory Coast, 2016).

The National Sport Policy is divided into six pillars which are composed of a total of 25 axes. The first pillar is concerned with strengthening the regulatory framework of sport by elaborating on the application texts of the law on sport, publishing and promoting the regulatory texts and enforcing the texts relating to recreational spaces in schools and in housing development. The second pillar aims to develop the sports infrastructure within the country. The five strategic axes a renovation of existing sports facilities and the creation of new local sports infrastructures. Pillar three, promoting and developing the practice of sport at all levels (mass sport, high performance sport, and school

sport), is, for example, supported by the strategic axis of promoting the organisation of sports events at the local, regional and national level. Establishing appropriate training systems for teaching and sports personnel (Pillar Four) is directed at sports teachers, supervisors and volunteers alike. Six strategic axes, including the initiation of fiscal incentives to encourage investment in the sports sector, are supposed to create the conditions for turning sport into a real source of socio-economic and financial opportunities (Pillar Five). Lastly, the development of institutional, structural and legal mechanisms for financing sport (Pillar Six) is aimed at strengthening of public-private partnership frameworks.

**Organisation of the sport sector.** The organisational structure of sport in the Ivory Coast can be presented in three levels (PricewaterhouseCoopers, 2020):

1. The public sector consists of international institutions (e.g., the UNESCO) and federations (e.g., the African Football Confederation) as well as ministries (e.g., the Ministry of Sport), National Public Establishments (e.g., the National Sports Office) and public agencies. At the municipal level, different cities and communities are responsible for sports in the country.
2. The voluntary sector encompasses many different actors, namely the national sports federations (e.g., the Ivorian Football Federation), the National Olympic Committee (NOC), the foundations (e.g., the Didier Drogba Foundation), and the NGOs, clubs and associations (e.g., the Association of Sports Journalists of the Ivory Coast).
3. The private sector comprises a wide range of companies, including energy suppliers, private gym chains, security and ticketing providers and even innovative companies such as start-ups.

**The financing of sport.** Out of the total 2016-2020 budget of the State of the Ivory Coast, 378 billion CFA francs (579 million EUR) were earmarked for implementing the National Sports Policy. The NSP is essentially financed from the state budget (90% of the budget) with little private sector involvement (10% of the budget; PricewaterhouseCoopers, 2020). The budget can be broken down into different areas, including the development of sports infrastructure and sports facilities (73%), promotion of sports for all (23%), strengthening the regulatory framework (1%), development of the training offer (1%), promotion of the sports industry (1%), financing of the sports sector (1%). Summing up, sports infrastructures and equipment and mass sports practice occupy an important place in the national sports policy: 96% of the budget is destined for the financing of infrastructures and the promotion of sport for all.

**Identification of sport and development initiatives.** After hosting the 8th Games of La Francophonie in 2017, the next major event planned in the Ivory Coast will be the 2023 African Cup of Nations (CAN). The Ivory Coast has agreed to host the African Cup of Nations in 2023 rather than 2021, confirming a shift in the calendar after withdrawing the 2019 edition to Cameroon. The organisation of this CAN is an opportunity for the Ivory Coast. It will allow to boost the economic sector of sport and provide adequate infrastructure for sport development at the local level. To this end, the Ivory Coast has launched the construction of four sports complexes in Abidjan (Ebimpé Olympic Stadium with 60,000 seats), Yamoussoukro (20,000 seats), San Pedro (20,000 seats) and Korhogo (20,000 seats). These works are almost all completed, especially in Abidjan (PricewaterhouseCoopers, 2020).

**Major sports in the Ivory Coast and some figures regarding sport participation.** Taekwondo is the leading sport federation in the Ivory Coast in terms of licensees<sup>24</sup> and titles in international sports events. Thanks to the performance of some Ivorian athletes and its educational values, taekwondo fascinates the country's middle class. The success of taekwondo is very important compared to other sports. In ten years, the number of licensees has increased from 16,000 to 46,203 people (18% of whom are women), making the martial art the second sport in the country, ahead of athletics and basketball. In 2020, we had more than 355 clubs in all country regions. The success of this federation is partly due to the numerous reforms of the professionalisation of the sector and democratisation of the practice of this martial art. Taekwondo is perceived as an educational tool in the Ivorian society to the point that a whole generation of senior Ivorian executives is active in taekwondo. Parents have gradually turned to this novelty and see this martial art as an educational tool. The Ivory Coast has two high-level athletes in this combat sport, namely Ruth Gbagbi, 2017 World Champion, and Cheick Cissé, 2016 Olympic Champion (PricewaterhouseCoopers, 2020).

Football is the first national sport and second federation in terms of licensees, represents a vector of social cohesion in the Ivory Coast. The practice of football has increased considerably in the Ivory Coast since its first participation in the 2006 World Cup in Germany. That same year, the national team was a finalist in the African Cup of Nations (CAN) in Egypt. Finalist of the CAN in 2012 and then winner of the 2015 edition, the Ivory Coast has seen a significant increase in the number of football licensees over the period 2015-2020. Twelve years after the 2008 Beijing Olympics, the U23 team of the Ivory Coast has qualified for the 2020 Tokyo Olympics. The national championship, organised by the Ivorian Football Federation and sponsored by the Orange company, has 16 clubs in Division 1, 24 in Division 2, 36 in Division 3 and 80 in Division 4. Soccer played an important role in national reconciliation during the years of the Ivorian political crisis (PricewaterhouseCoopers, 2020).

In 2019 when the study was conducted by PwC, the Ivory Coast officially had 184,280 licensees of which 40,726 were women, i.e. 22,1% of the total number of sports licensees. On average, 20% of combat sports licensees are women. Handball, walking, volleyball, badminton, wrestling and board sports are relatively balanced (between 40 and 60% are women; PricewaterhouseCoopers, 2020).

Apart from football (all disciplines combined), combat and pedestrian sports are the most practiced in the Ivory Coast with 61% of the licensees. An overview of the ten leading federations in terms of licensees can be found in Figure 16. In total there were 53 national sport federations in 2019. Apart from football (all disciplines combined), combat and pedestrian sports are the most practiced in the Ivory Coast with 61% of the licensees (PricewaterhouseCoopers, 2020).

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<sup>24</sup> A licensee is a sport participant. Sport participants obtain licenses to take part in sport activities of the federation (commonly for one year until the licence has to be renewed).

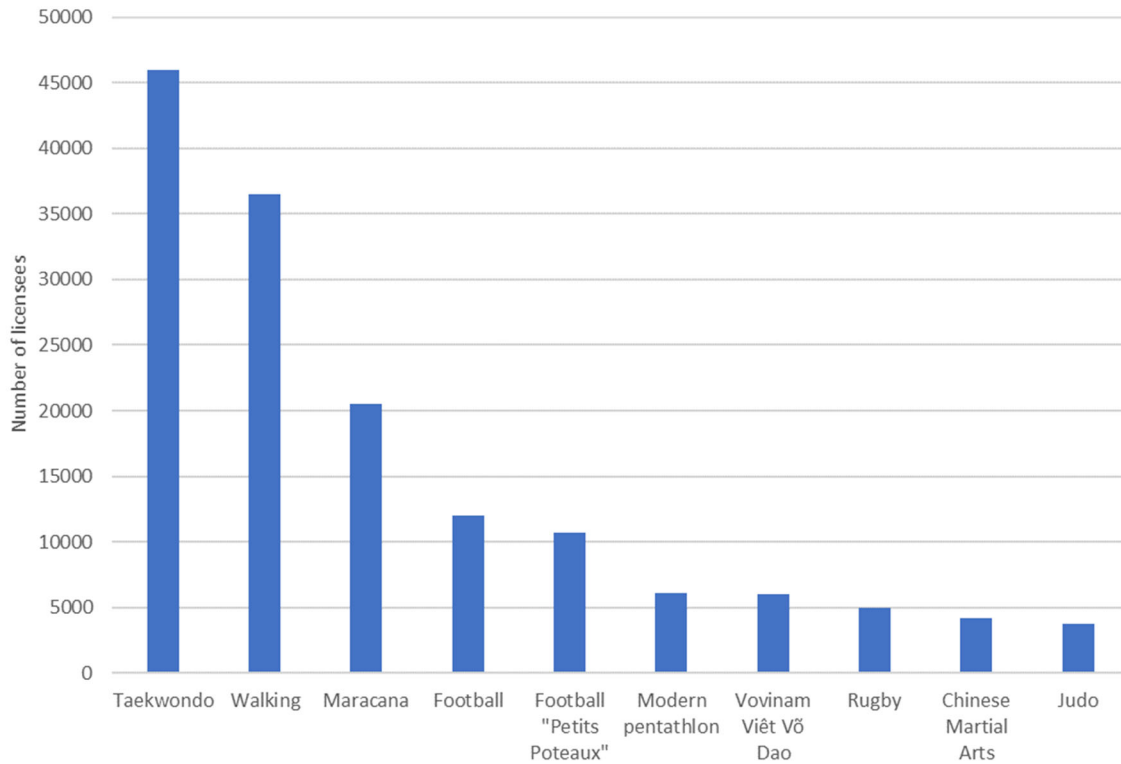


Figure 16. The ten leading federations in terms of licenses (adopted from PricewaterhouseCoopers, 2020, p. 12)

The contribution of sports to the Ivorian GDP is rather low compared to the countries of the West African sub-region: over the last ten years, it was estimated at an average of 0.04% of GDP compared to an average of 0.33% in West Africa. The national budget allocated to the sports sector in 2019 amounts to 10 billion CFA francs, or about 15 million EUR. This is a significant increase compared to previous years. Indeed, this is due to the organisation of the African Cup of Nations 2023, which will be held in the Ivory Coast from 1 June to 30 July 2023.

**Organisation of the Ministry of Sport.** The organisation of sports is the responsibility of the government through the Ministry of Sport. The government supports and supervises, in the respect of the rules of autonomy and independence provided for by the international sports movement, the activity of legal entities whose objective is the practice of sport, but also the organisation of competitions of a national or international nature. Sport in the Ivory Coast is headed by Minister Claude Paulin Danho since 6 April, 2021. The Ministry is composed of the Minister's Office and the National Public Establishments. The Minister's Office, in turn, comprises the Cabinet's members, the services and departments attached to it, and the General Directorate of Sports. The Services and Directions include various departments such as the General Inspection, the Department of Financial Affairs, the Department of Human Resources, the Department of Planning, Forecasting and Statistics, the Department of Communication, Information Technology and Documentation, and the Department of Legal Affairs, Litigation and International Affairs. Furthermore, the General Directorate of Sports comprises the Department of the Professionalisation and Economy of Sport, the Department of Mass and Gender Sports, the Department of Sport for All, and The Department of Federal Life and High-Performance Sport. The National Public Establishments include the National Office of Sports (ONS), the National Institute of Youth and Sports (INJS), and the Ivorian Office of School and University Sports (OISSU).

**Conclusion.** In summary, the Ivory Coast has a very good NSP and is trying to make the sports sector work, but with many difficulties. Efforts to improve the governance of the whole system, which is very dependent on the government budget through the Ministry of Sport, continue to be made. This includes a professionalization of the sports industry in the Ivory Coast and especially the development of the sport economy with very talented major players who are just waiting for it.

#### 5.4.2 Country profile

The Republic of Côte d'Ivoire (i.e. the Ivory Coast) is a country on the southern coast of West Africa. With its 27 million inhabitants, the republic generates an annual GDP of approximately 69.8 billion USD (The World Bank, 2022b). Consequently, the gross domestic product per capita equates to 2,579 USD. The agricultural sector is crucial for the Ivorian economy. In 2019, 40.2% of the Ivory Coast workforce was employed in the agricultural sector. Hence, they were involved in agriculture, hunting, forestry, and fishing (The World Bank, 2022b). The share of youth not in education, employment or training is approximately 10.81%. Figure 17 presents an overview of the economic importance of the sport sector.

## Info sheet on the economic importance of the sport sector and the employment situation

### IVORY COAST

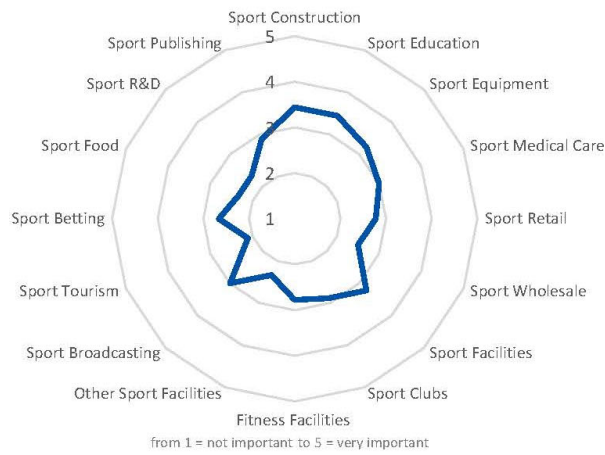


Figure C1-1. Importance of the sport sub-sectors for the economy



Figure C1-2. Country information

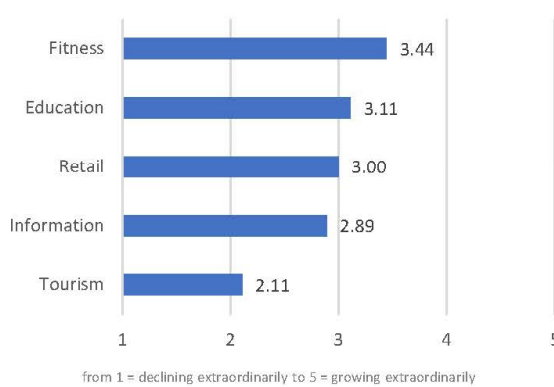


Figure C1-3. Growth potential of the sport sub-sectors

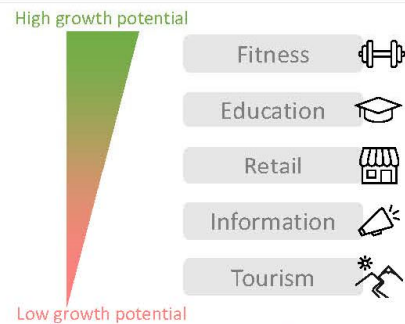


Figure C1-4. Ranked growth potential of sport sub-sectors



Figure C1-5. Ø number of qualified applicants per job opening



Figure C1-6. Difficulty to find qualified employees



Figure C1-7. Importance of the sport sector as an employer

n = 9; Average years of professional involvement in the sport sector (M = 13.8 years)

Figure 17. Economic importance of and employment situation in the Sport sector of the Ivory Coast

The experts described a range of investments that occurred in the sport sector. Multiple experts reported that considerable investments went into the fitness sub-sector. Hence, new fitness facilities were constructed, and employees were hired. Moreover, organisations in the fitness sector expanded their offers. In addition, the sport betting business and the e-cash sector have been growing considerably, according to experts. Investments from Didier Drogba helped develop organised football in the Ivory Coast. These investments help build or renovate football stadia to host the

upcoming African Cup of Nations. Finally, investments into hospitality infrastructure were mentioned.

The experts indicated a range of difficulties in developing the sport sector in the Ivory Coast. For instance, the financing of sport and its structures hinders the sector's development. More specifically, the financing of sporting infrastructure through public and private institutions is limited. The experts further noted that qualified employees are lacking. The lack of skilled individuals is said to hold back the professionalisation of the sector. Similarly, the Ivory Coast's digital infrastructure restricts for-profit organisations' opportunities. Finally, the informal structures in the sport sector were mentioned as a limiting factor in the development.

When asked about the most pressing challenges in the sport sector, a lack of governmental support and funding was marked as a serious challenge. Beyond this, the fitness sub-sector lacks skilled employees and has to deal with the bad condition of the existing infrastructure. Similarly, the sport education sub-sector is confronted with a lack of available infrastructure and the poor condition of the existing infrastructure. A lack of skilled employees challenges the sport information sub-sector. Finally, the sport retail sub-sector is confronted with the low-grade condition of the infrastructure.

The experts reported homogeneous employment trends in the Ivory Coast. More specifically, the experts noted a rise in coaches, fitness trainers, and P.E. teachers. One expert specified that personal trainers commonly work as entrepreneurs who run small business and as employees in fitness facilities simultaneously.

In recent years, a range of large-scale sport events (more than 10,000 spectators) have been hosted in the Ivory Coast. For instance, the annual marathon in Abidjan attracts a large crowd. Moreover, the presence of Didier Drogba at Champroux Stadium was a significant sporting event. Beyond this, the national football team matches frequently attract many spectators. In addition, the Jeux de la Francophonie in 2017 were an important sport event. Figure 18 highlights important sport events in the Ivory Coast.



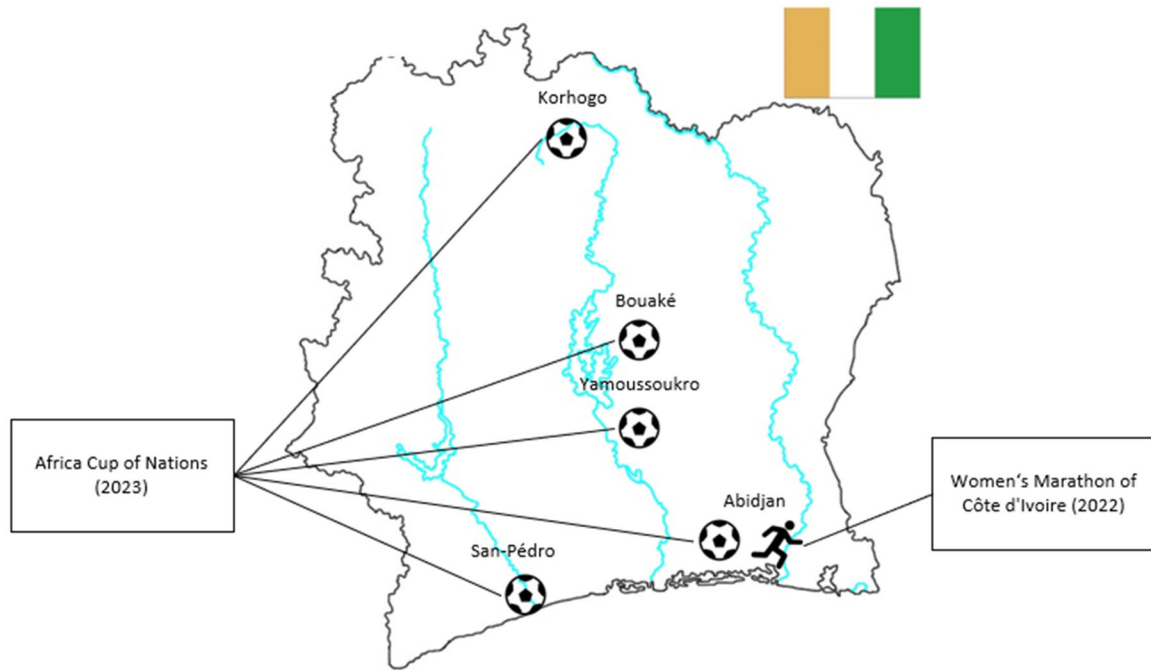


Figure 18. Past and upcoming large-scale sporting events in the Ivory Coast

### 5.4.3 Social and cultural relevance of sport

The three interviewees from the voluntary sector described Ivory Coast as a country where sport is seen as a leisure activity. Sport does not play a substantial role on a political or social level at the moment. While there is interest in certain sports, the level of organisation was not considered good.

*“Sport doesn’t have any particular meaning except that it keeps people busy. Maybe, when we need people not to bother us, we tell them to play sports and then well, we don’t care about it.”<sup>25</sup> (CIV3VOL)*

The dominating sport in Ivory Coast is football, with famous players like Didier Drogba, who also attempted – and failed – to become president of the Ivorian football federation in 2020. However, the national championship has declined for a while. There are often just a few hundred spectators at the local matches, even for the big derbies. While there used to be other popular sports like athletics, handball, basketball, volleyball, and rugby, the number of competitions and spectators has declined drastically. Also, school and university competitions have been halted.

Regarding participation, the most practised sports are football, martial arts like taekwondo and judo, basketball, and athletics. After a reduction in physical education hours in schools, several non-governmental organisations, like “Mouvement des Jeunes pour le Développement du Football et Sports associés” (Mojef) stepped up to boost grassroots participation in sport. Mojef, for example, has a presence in around 150 locations on the Ivory Coast. The interviewees saw the importance of sport as a social factor, describing how it could be used to address youth delinquency, drug use,

<sup>25</sup> „Le sport n'a pas de signification particulière à part qu'occuper des gens peut-être quand on n'a pas besoin, quand on a besoin que les gens ne nous gênent pas, on leur dit faire du sport et puis bon, on ne s'en occupe pas“

and other social ills. However, they saw little support or initiative from the government to take advantage of that potential.

In January 2024, the men's football African Cup of Nations will take place in Abidjan, Bouaké, Korhogo, San Pédro, and Yamoussoukro. This major event may potentially lift Ivorian's passive and active participation in sports.

#### 5.4.4 Economic potential and trends in the sport sector

The African Cup of Nations in January 2024 was described as a potential catalyst for the sport sector in Ivory Coast, both economically and socially. For one, there is the construction of three new stadia that will remain as a physical legacy. Moreover, interviewees hoped that the tournament would enhance economic activity and leave a sporting legacy for the youth as well.

*“If I take the political capital of the country, which has a stadium that will host some games for the African football cup next year, you can see around that city, a lot of businesses that will grow. In terms of hotels in terms of catering, restaurants, tourism, it'll create kind of business in this city and around. So, even after the African football championships, the youth will use these facilities.” (CIV1VAR)*

However, one interviewee pointed out that big stadia need to be maintained and made accessible to the general public. They hoped for the construction of more community sports facilities.

After Didier Drogba submitted his candidacy for the presidency of the football federation, it was noted that more private companies and philanthropists were starting to get involved in Ivorian football. Clubs were increasingly looking to professionalise their operations to attract better sponsorship deals and investments. Potential sponsors are oil and gas companies, sports betting companies, and telecommunication companies.

Despite receiving funding from the Ministry of Sport, many sport federations are struggling. Some of the challenges on the political and administrative levels of the sport sector were pointed out as corruption, cronyism, and a lack of qualified sport administrators. On the other hand, the Ivory Coast updated its national framework in 2014 from an outdated 1968 decree. It introduced a new sports law, named “loi n° 2014-856 du 22 décembre 2014 relative au sport”. This law provides a modern framework for managing and administering sport in the Ivory Coast.

So while the sector is not where it could be, some carefully hopeful voices point out the potential for certain sub-sectors, such as sport tourism. This relates to the events to be hosted which could generate income from passive sport tourists. However, anecdotal evidence based on desk research also indicated that there are at least some opportunities for active sport tourism, including hiking trails.

#### 5.4.5 Education and employment

The education system in schools and universities is not set up for athletic talent identification. While there are many talented athletes, the sport system is currently not conducive to detecting or supporting that talent. Most of the Ivorian talents tend to go abroad. At the same time, the national football team consists of players that have mostly grown up in other countries, like France, Belgium, or the UK.

There is only one national institute for sports, called “Institut National de la Jeunesse et des Sports” (INJS). It provides programmes in physical education and socio-educational animation. This results in a lack of qualified coaches and trainers in all disciplines. For example, the football federation is still the only federation with a technical department providing technical training to coaches and educators. There are also no specific sport management degrees, so there is a big gap between what employers need and the type of education currently offered in the Ivory Coast. Other missing competencies are sport marketing, human resources management, law, and event management.

*“Skills, there is the organisation and management of sports activities, competitions, programming, management, and organisation of sports activities. Well, we don’t have that. We try to do it by experience, [...], we have no training for that.”<sup>26</sup> (CIV2VOL)*

Opportunities exist in event organisation, facility management, coaching, and teaching. According to one expert, the job market is very informal, with jobs not being advertised but given to acquaintances rather than going through a professional recruitment process.

#### 5.4.6 Competencies for the sport sector<sup>27</sup>

Reflecting on the structure of Ivory Coasts’ sport sector (public, voluntary, and private), most jobs are located in the public sector. Arguably, this can be attributed to the high number of sport events the state hosts each year.

**Public sector.** Each year the state organises competitions in the civil service to recruit civil servants. Once recruited, they follow professional training from one to four years, depending on the speciality. Afterwards, the state assigns the new civil servants to public administrations on the Ivorian territory, and they become state employees. In addition, some civil servant students benefit from a scholarship to train outside the Ivory Coast in specialised sports institutions. They become executives who can work for the state in a sports institution in the Ivory Coast or abroad. The National Institute of Youth and Sports in Marcory (Abidjan) trains sports professionals focusing on PE and sports teaching or solely on sport teaching. After obtaining the baccalaureate, the candidates are selected after passing the civil service competition, which is done every year.

**Voluntary sector.** Generally speaking, the actors involved in sport do so out of passion. It is a function they perform voluntarily and therefore are not paid for the most part. Their mission is to train athletes, and their great satisfaction is to see them succeed. In return, they receive recognition from the athletes and the state. In other cases, the more professional ones receive commissions on their various transactions and their members’ fees. Given how they operate, finding job offers to recruit their members is very difficult.

**Private sector.** Each company recruits its personnel in the private sector according to the means at its disposal. There is no obligation to recruit its personnel via conventional recruitment methods through a recruitment agency. However, if the company is registered in a Quality Management System, it is required to respect recruitment procedures with traceability. Considering the strong potential of the private and voluntary sectors, a good organisation and curricula adapted to all the

<sup>26</sup> „Les compétences, il y a l'organisation et le management des activités sportives, les compétitions, la programmation, le management et organisation des activités sportives. Ça, nous n'avons pas ça. On essaie de faire par l'expérience, [...], on n'a pas de formation pour ça.”

<sup>27</sup> Text was written by N'dri Affre Dany Romaric; No competency profile could be created as no formal job advertisements could be obtained.

professions in the field of sport would be a very salutary initiative for developing the sports economy in the Ivory Coast.

## 5.5 Jordan

### 5.5.1 National sport system of Jordan (Author: Maria Barakat)

#### 5.5.1.1 Introduction

Sport in Jordan has developed over the years into a sector with a formal structure in various ways, culminating in its management transition to the Jordan Olympic Committee (JOC) in 2002. The JOC's mission is to serve as the governing body for the sport movement and within the kingdom's 45 Olympic and non-Olympic sports federations. Since then, the JOC has been working to establish the groundwork and pave the way for Jordanian sport to grow and advance.

However, sport is still seen as a marginal sector with a constrained future. In addition, many professionals have decided to pursue athletic careers and embark on a journey by competing in regional, national, and international sporting events. Yet, sporting accomplishments at various levels are typically only marginally taken into account by local media and non-sporting organisations. Jordan's perception of sport has undergone a paradigm shift since the country won its first gold Olympic medal at the 2016 Summer Olympics in Rio. This has been seen as a strategic shift in the sector's development, management, and shaping. In order to promote the country's sport sector and enable it with a wider aim toward creating an active sport nation by involving and forming future generations via sport and physical activities, the job of the JOC has become more important than ever at this time.

Since Jordan's sport sector is not formally represented at national decision-making levels or tables, it can only influence short-term changes in Jordanian institutions and society. The special transformative law passed in 2003 that the sector is based on has not been institutionalised or revised with national organisations, government entities, or stakeholders, and has further eroded the sector's legal status, according to the JOC. As there is no institutionalised law, the funding of the sport sector varies. This restrains the sector from seeing the developments hoped for. The financial aspect is a major constraint when pursuing new programmes and initiatives on the national, regional, and local levels for elite and grassroots sports.

#### 5.5.1.2 The sport system and the structure of organised sport

Figure 19 provides an overview of the most important actors in the Jordanian sport system.

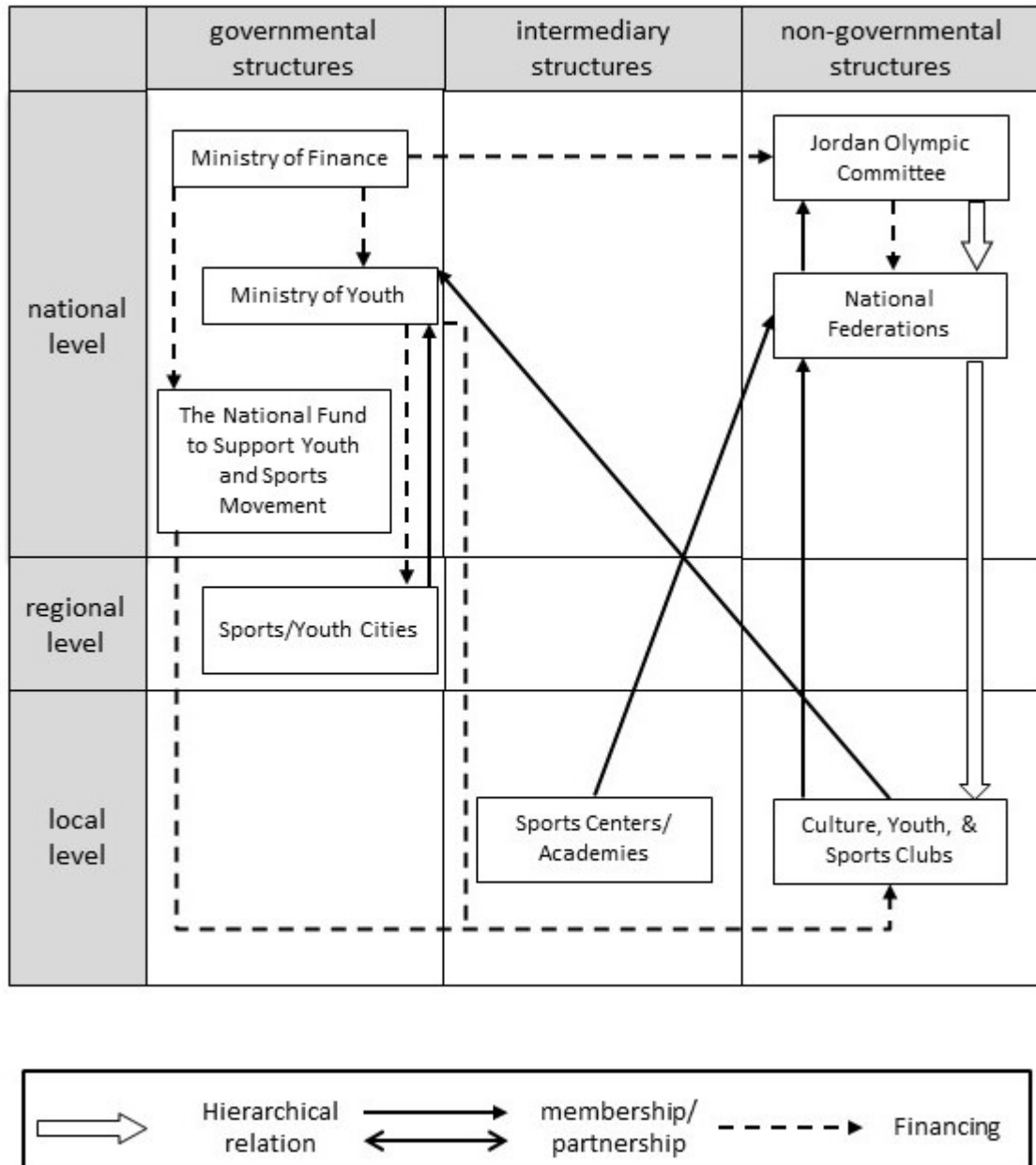


Figure 19. Structure of the national sport system of Jordan

**Ministry of Finance.** One of the Ministry of Finance programmes is the “Supporting Media, Religious, and Cultural Affairs Programme” (Jordan Ministry of Finance, 2022). The programme is geared to provide annual financial support to ministries, government institutions, and departments supervising cultural, religious, media, and sports affairs. Through this programme, the Ministry of Finance annually supports the Jordan Olympic Committee with 10.5 million JOD and the Jordan Football Federation with approximately 1.5 million JOD.

The National Fund for Sport and Youth Movement Support's goal is to support youth aspirations and current and future needs by increasing financial resources available to the youth and sports movement through the establishment of investment projects and contributions to youth and sports projects, and facilities (Jordan Ministry of Finance, 2017).

**Jordan Olympic Committee.** The Jordan Olympic Committee is a non-profit organisation that includes the Olympic and non-Olympic sport federations under its umbrella. The JOC supports these federations on a systematic basis to ensure the emergence of a generation of athletes capable of competing in various continental and international championships. Moreover, the JOC lays down the foundation and trail to develop and rise with the state of sports in Jordan.

Jordan provides a variety of sports gyms and fitness centres; sports centres, academies, clubs, and sports cities. Thirty-three per cent of these facilities exist in Amman. Occupants of other governorates have access to these facilities. The JOC and the Ministry of Youth are considered the main regulatory bodies for the abovementioned facilities (JOC, 2020).

**National Sport Federations.** The JOC has supported diverse types of national sports federations since its inception in 1957. The responsibilities and roles of these federations are essential for Jordanian sports. They were founded to govern the related-sport promotion and administration, to nurture the country's athletes, and to provide them with countless services and infinite support by delivering training and competition programmes of high standards. The number of these federations has increased over the years to 47 federations of Olympic and non-Olympic nature. The number of registered athletes at the federations and sports clubs exceeded 19,000 in 2019 (JOC, 2020). Empowering the sports federations is crucial to drive positive change and radical transformation in our sports community.

**Sports Clubs.** The Ministry of Youth, as the governing body for sports clubs in Jordan, has licensed and regulated the work of various sports clubs. Sports clubs are considered private associations, responsible for promoting one or more sports, participating in tournaments and championships, and supporting their teams. Over the years, nearly 291 sports clubs have been founded, with 23% of them located in Amman. The Al-Faisaly Club and its competitive Al-Wehdat Club are an example of professional football clubs. Although Al-Faisaly club is very well-known for its football team, the club has also focused on other sports, such as handball, basketball, volleyball, and boxing. Successful and professional sports clubs will, directly and indirectly, boost the local economy of the countries where they are located.

**Sports Centres and Sports Academies.** Sports centres and sports academies provide training and recreation services for their members, encouraging young people to practise to develop physical fitness and self-discipline. The Amman Chamber of Commerce licenses centres and academies, which the JOC regulates. In 2019, the number of sports centres and sports academies reached 2,861, with almost one-third of them located in Amman (874), or 31% of the total number in Jordan. Members of these centres have been estimated to be 214.5 thousand in the same year (JOC, 2020). These facilities are considered another driving factor for the economy.

**Sports Cities.** Sports Cities are the other types of sports complexes in Jordan, established to encourage people to do sports and host sport events. Five sports cities operate under the authority of the MOY. They belong to the municipalities and therefore serve the local community and international teams. In addition to sporting events, these cities have also hosted many important cultural and political events. The complexes accommodate several sports fields, halls, swimming pools, stadia, and other sports facilities. The number of seats available to attend football stadium events in the cities is 48,000, and the number of seats in the sports halls is 21,000. In 2019, the federations organised around 51 tournaments at the regional level. The sports centres and sports clubs organised

53 and 113 tournaments. These events influenced the economy. Thus efforts to continuously support these sports cities are needed.

Obviously, these sports facilities, in all their forms, are a driving force for the development and prosperity of the national economy. Further studies and statistical surveys are needed to tackle the trends and to provoke the discussion around attracting local and international visitors. Additionally, considering the world is becoming digitalised, efforts should be made to support electronic sports. Currently, three companies provide games and gaming experiences to around two million participants in the field of electronic sports. Table 20 represents the sports facilities in numbers for the year 2019.

*Table 20. Number of organisations in the sports industry in 2019 (adopted from IOC, 2020)*

Type of organisation	Number
Gym, health, fitness, and sport centres and sports academies	2861
Sports clubs	291
National sport federations	47
Sports cities	5

### 5.5.2 Country profile

The Hashemite Kingdom of Jordan is a country located in Western Asia. With its approximately 10 million inhabitants, the country generates an annual GDP of 45.2 billion USD. Consequently, the GDP per capita equates to 4,406 USD. The Gini index of 33.7 indicates a medium distribution of wealth within the country (The World Bank, 2022b). In 2019, 2.5% of the Jordanian workforce was employed in the agricultural sector. Hence, they were involved in agriculture, hunting, forestry, or fishing (The World Bank, 2022b). Overall the economy of Jordan is relatively diversified. The rate of unemployment in Jordan is approximately 19.25 %. The share of youth not in education, employment or training was roughly 35.38 % in 2020. The educational attainment in Jordan was 89.23 % in 2020 (The World Bank, 2022b). Figure 20 indicates the economic importance of sport in Jordan.

## Info sheet on the economic importance of the sport sector and the employment situation

### JORDAN

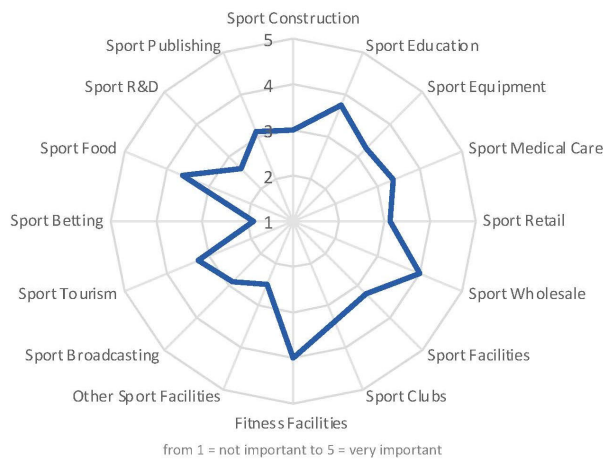


Figure C1-1. Importance of the sport sub-sectors for the economy

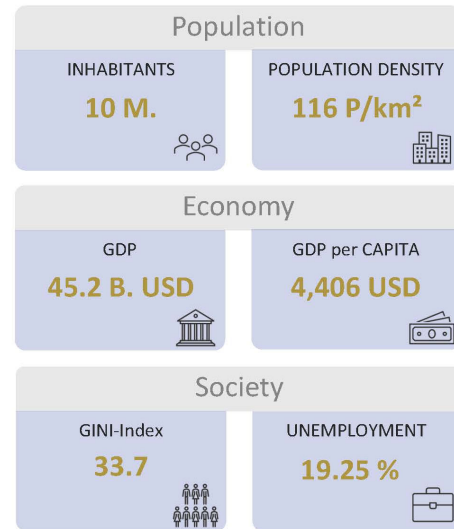


Figure C1-2. Country information

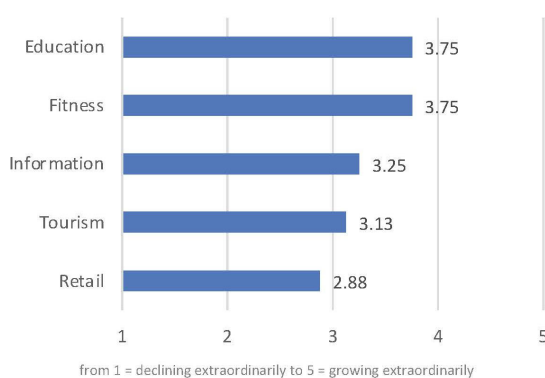


Figure C1-3. Growth potential of the sport sub-sectors

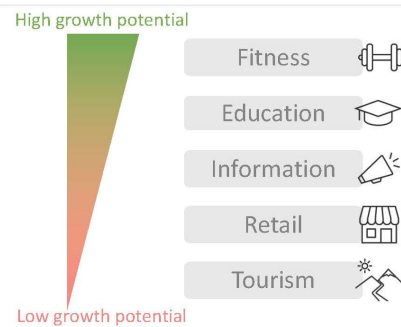


Figure C1-4. Ranked growth potential of sport sub-sectors



Figure C1-5. Average number of qualified applicants per job opening



Figure C1-6. Difficulty to find qualified employees



Figure C1-7. Importance of the sport sector as an employer

$n = 8$ ; Average years of professional involvement in the sport sector ( $M = 3.5$  years)

Figure 20. Economic importance of and employment situation in the sport sector of Jordan

The experts described a few investments in the sport sector in Jordan. For instance, one expert described that recreational sports and fitness clubs receive funding from private investors. However, it was further noted that sports activities strongly depend on foreign financial contributions. Moreover, the lack of investments in the sport sector was explained by a lack of a sports culture in Jordan. Hence, private and public investments in the sport sector are severely limited. Nevertheless, one expert noted that private investments predominantly go to fast-growing and high-potential sports like Padel, Pickleball, Rugby, and American Football. In addition, multi-purpose sports



facilities are constructed, which rent courts to the public for recreational use. One expert noted that the Olympic Preparation Centre was constructed recently.

The experts noted that sports funding in Jordan is a dominant difficulty in developing the sector. Moreover, it was pointed out that the government does not prioritise sports development, which limits government support. A lack of legislation and policy for developing the sport sector is closely associated with this. One expert noted that corruption limits sports ability to develop. Finally, it has been outlined that sport is considered a luxury good and is not incorporated into the lifestyle of the Jordanian population. Across all five sectors, the experts indicate that a lack of government funding and support is one of the significant challenges. In addition, the sports tourism sub-sector is seriously challenged by the lack of private investments. The sport fitness sub-sector has to deal with the bad condition of the existing sporting infrastructure. The sport education sub-sector lacks private investments and available infrastructure. The sport information sub-sector has a shortage of private investments, and the sport retail sub-sector faces a scarcity of skilled employees. Regarding the employment situation in Jordan's sport sector, the experts highlighted a lack of professionalism and missing capabilities in applicants. In addition, one expert indicated that unqualified individuals hold decision-making competencies in the sport sector.

Hosting sport events can have a multitude of advantages for a nation. In the last five years, predominantly football and basketball matches attracted larger crowds (more than 10,000 spectators) in Jordan. In Jordan's highest football league, the Jordan League, 12 teams are organised. In the upcoming years, a few sport events are scheduled to be hosted in Jordan (see Figure 21).

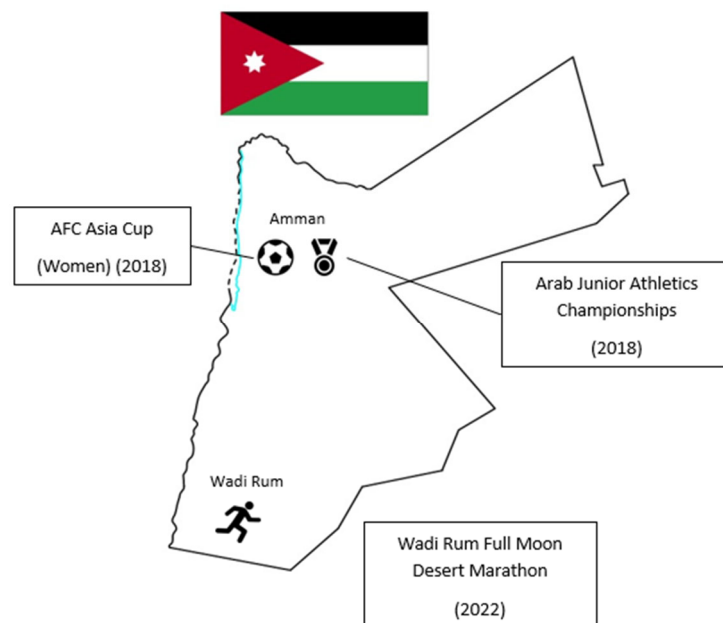


Figure 21. Past and upcoming large-scale sporting events in Jordan

### 5.5.3 Social and cultural relevance of sport

According to the two interviewees from the for-profit and voluntary sector, sport in Jordan is an important part of daily life and culture.

Regarding active participation in sport, the most popular sports were football, taekwondo and jiu-jitsu, gym and fitness, swimming, and walking. One interviewee pointed out eSports is becoming increasingly popular.

It was estimated by the interviewees that there are around 250,000 to 350,000 people active in 190 official non-profit sports clubs. Both also mentioned the increasing popularity of around 2,000 private gyms or sports centres in the country. One interviewee pointed to outdoor walking clubs. Through the Covid-19 pandemic, physical activity and sport were recognised by many people as vital to personal health and wellbeing.

*“But what Covid did to the societal development is the attachment to sport: People realised how important it is, how sport can prevent them from different types of illnesses” (JOR1FPR)*

In terms of passive participation (spectating and viewing), the most followed sports were identified as football, handball, volleyball, and basketball, as well as Olympic sports like gymnastics and swimming. Media outlets in Jordan usually have specific sport sections to report about sport, including newspapers, websites, broadcasters, TV channels, and radio stations. Many people also consume sports via social media platforms.

Women are actively involved in sport in Jordan. Depending on cultural upbringing, women may choose to train in facilities separate from men. However, there are also mixed gyms and facilities where men and women train together. Both men and women watch sports. Yet, one interviewee pointed out that men pay more for watching and spectating sport than actually practising it.

#### 5.5.1 Economic potential and trends in the sport sector

The responsible government organisation for sport is the Ministry of Youth. A tax law in Jordan exempts companies from paying certain taxes if they support sport organisations or athletes. This could present some opportunities for private investment and CSR-related projects. The Jordan Olympic Committee (JOC) is leading the sport federations, and indirectly the sports clubs. The JOC is developing a national strategy for sport. However, according to one interviewee, it has been difficult to get outside funding for organised sport, because the government has not made sport a priority on the national agenda. This resulted in reductions in investment from international aid and development agencies. Private sector activities are dominated by gyms and fitness centres and are a growing business.

The interviewees highlighted that construction was an important sport sub-sector. Especially over the last 20 years, since Jordan hosted certain events like Arab Games in 1999 and the FIFA U17 Women’s World Cup in 2016, new facilities have been built and older facilities were renovated. While both interviewees expressed wishes for Jordan to host more major events, there was some scepticism since maintenance and facility management were considered weak.

Sport tourism was pointed out as an active sub-sector. Jordan hosts many motorsports events, cross-country rallies (in the Wadi Rum desert), and equestrian rallies. Also, wakeboarding, kite surfing, and golf were mentioned as sports that draw tourism to the south of Jordan, in the province of Aqaba. Anecdotal evidence, based on desk research, supported the interviewee’s impressions in this regard. Several German and Austrian travel agencies offer a range of sport tourism activities in

Jordan. Commonly, they contract local agencies for operational management and the actual tours and activities.

Broadcasting is a potential growth market. However, there is room for improvement. Some specific sports were mentioned as growing rapidly or having considerable potential:

*“Padel tennis – major. Padel tennis and eSports can be put as the two most quickly growing sports. Mixed martial arts also, MMA. I would put those three as the top three in growth.”*  
(JOR2VOL)

The most important factor for both interviewees was for the government to make sport a national priority and implement a strategic plan for sport.

### 5.5.2 Education and employment

According to one interviewee, a recent study showed that 37.000 people work in the sport sector. Forty per cent work in fitness centres, 27% in sports clubs, 16% are coaches and trainers, 8% are in academies, 7% are elite athletes, and 2% are at national federations. Police and military sport federations support elite athletes by providing employment.

Jordan has multiple universities with sport faculties. However, there is no specific sport university. Since entry requirements for sports studies were considered as low, many students enrol because they cannot enter other subjects, and not because they are passionate about studying sports. This may be why the interviewees described physical education at schools as insufficient and lacking professionalisation. Also, people motivated to further their studies in sport and study a Master’s or PhD programme tend to go abroad, often with scholarships from the JOC or other entities. The JOC has also set up an academy to educate sports coaches, strength and conditioning coaches, and sport nutritionists.

Some skills that are lacking were identified as sport-specific therapists and doctors. The JOC addressed this by engaging with the WFATT, the World Federation of Athlete Training and Therapy. Generally, standardisation and certification were mentioned as a challenge to quality education in the sport sector. Also, a lack of English-speaking professionals hindered the development of certain sub-sectors, such as media. Moreover, the entry barriers for women to work in sport are still high. One female media executive started a WhatsApp group of women working in the media in different Arab countries. The group has grown from four or five members to around 120 women in a few years.

### 5.5.3 Competencies for the sport sector

Having an excellent individual competency profile aids the chances of a successful job application. Nine job ads from Jordan were analysed to determine which knowledge attributes, skills, abilities, and other competencies were desired by employers (see Figure 22).

## Central competencies for sport sector jobs in

### JORDAN



Figure P1-1. Frequency of knowledge attributes in sport sector job offers

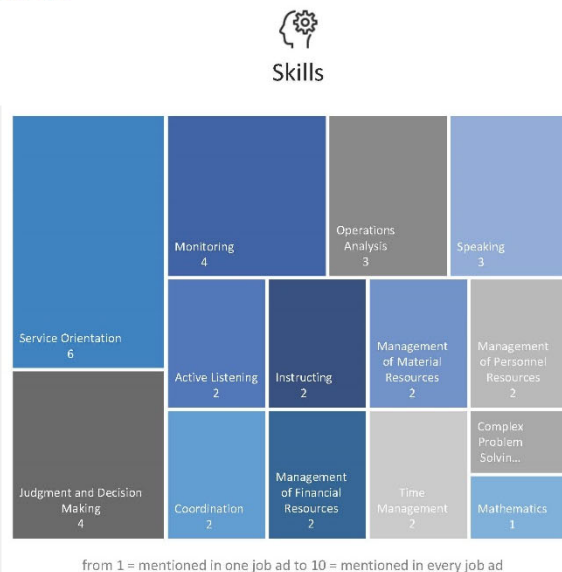


Figure P1-2. Frequency of skill attributes in sport sector job offers

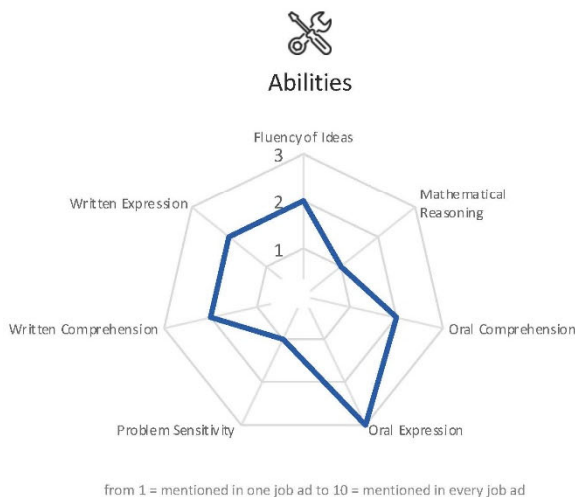


Figure P1-3. Frequency of ability attributes in sport sector job offers



Figure P1-4. Representation of other competencies in sport sector job offers

Nine current (2<sup>nd</sup> quarter 2022) job offers were analysed to assess the required competencies in the national sport sector. The frequencies result from matching the job offers with a set of defined competencies. Job titles of the analysed job offers: International Relations Coordinator; Operations Manager; Cloud Engineer; Gym & Spa Manager; Core Sport Leader; Recreation Supervisor; Shop Manager; Fitness Director; Sales Associate

Figure 22. Central competencies for sport sector jobs in Jordan

The overwhelming majority of job ads indicated that applicants ought to be familiar with the English language's structure and content, including the meaning and spelling of words, rules of composition, and grammar. Moreover, five out of nine job postings showed that knowledge about computers and electronics and administration and management is desired. Hence, individuals should be familiar with circuit boards, processors, chips, electronic equipment, and computer hardware and software, including applications and programming. Moreover, employers valued knowledge of

business and management principles involved in strategic planning, resource allocation, human resources modelling, leadership technique, production methods, and coordination of people and resources.

Being service oriented appeared to be a vital skill in Jordan. Six of nine analysed job postings denoted that candidates should actively seek ways to help people. Moreover, more than half of the examined job ads require candidates to consider the costs and benefits of potential actions to choose the most appropriate one. In addition, individuals ought to assess their own performance and someone else's performance to make improvements or take corrective action.

The analysis of the abilities revealed a rather heterogeneous result. However, oral expression and comprehension, as well as written comprehension and expression, were mentioned. Oral expression was named in three job ads and was the most prominent ability.

The analysis of the other competencies denoted that employers value individual effort. In other words, individuals should establish and maintain personal goals and exert effort towards mastering them. Furthermore, job applicants should be pleasant with others on the job and display a good-natured, cooperative attitude. In addition, four of the analysed job postings mentioned attention to detail, concern for others, dependability, initiative, and integrity.

## 5.6 Kenya

### 5.6.1 National sport system of Kenya (Author: Festus Kiplamai)

This chapter presents the reader with an overview of the development of the sport in Kenya, its basic organisational structures, the financing of its sports activities, the provision and running of various competitive sports, the roles of various sport federations, the Ministry of Sports, the sports associations, the functions of sports council and the role education institutions in Kenya.

In Kenya, sports is a multi-disciplinary discipline organised at the national administration level and devolved into regional administration units called counties (see Figure 23). Preliminary sports in Kenya were a recreation event as most people used sports for either leisure or an activity to engage in during their free time. However, positions have changed, and people are making it a career sport. Various native sports have succeeded in Kenya as foundations of culture and a human way of living (Wanderi, 2006). Kenya is best known for its athletic prowess and is considered one of East Africa's great sporting nations. Kenya boasts award-winning athletes like Kipchoge Keino, Joseph Ngugi, Paul Tergat, Moses Tanui, Catherine Ndereba, Tecla Lorupe, and current ones such as Eliud Kipchoge, Ferdinand Omanyala, among others who scooped several awards during world athletics and other international meetings worldwide. Despite its traditional prowess in athletics, Kenyan diversifies into other sports disciplines such as golf, football, and rugby. Moreover, cricket is growing in popularity and participation (The Ministry of Sports, Culture and Heritage, 2022).

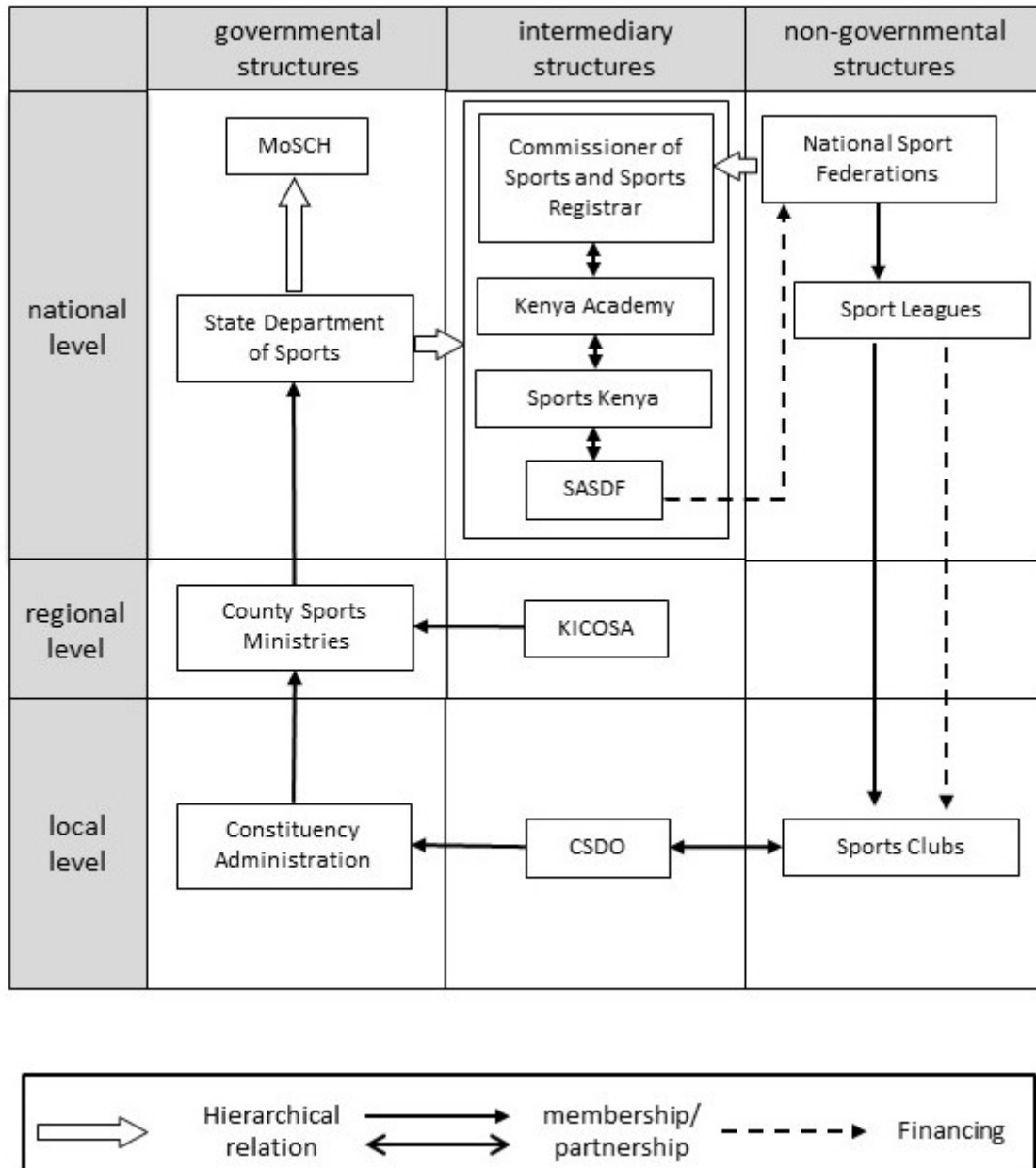


Figure 23. Structure of the national sport system of Kenya

Note. MoSCH = Ministry of Sports, Culture and Heritage; SASDF = Sports, Arts and Social Development Fund; KICOSA = Kenya Inter County Sports & Cultural Association; CSDO = Community Sports Development Organisations

Sports organisations in Kenya date from the colonial period when they developed around the framework of sports clubs created by administrators who were settlers, missionaries, or teachers. This was formed to enable Kenya to participate in international competitions. The first national governing body emerged in the 1920s, and this was based on the demand and regulations of the international sports umbrella, which initiated the Kenya amateur athletics association. Registrar of Societies in Kenya formalises associations by requiring them to register with them to enhance government structures. The Kenya athletics amateur association coordinated sports in Kenya. It joined the Commonwealth Games Association in 1952 and the Kenya Olympic Association in 1954 (Nteere, 1991).

Sport is under the Ministry of Sports, Culture, and Heritage (MoSCH), which received full ministerial status in 2003. A couple of decades ago, sports were in the Social Services department. Kenya's football association was founded in 1946, hockey in 1950, athletics in 1951. The National Olympic Committee of Kenya was established in 1954.

The Department of Sports within the Ministry came into being through a Presidential circular directive in 1987. It draws its mandate from the sessional paper No. 3 of 2005 on Sports Development, the Constitution of Kenya, Executive Order No. 30 of 2013, and the Sports Act No. 25 of 2013. It plays an oversight role in recreation and sports activity development in Kenya.

Since its inception, Kenya Olympic Association has carried out its mandate under three broad policies:

- 1) Entry of teams for the Olympic Games, Commonwealth Games and All Africa Games,
- 2) fundraising to help athletes train and travel, and
- 3) to train its officials.

The Kenya National Sports Council (KNSC) was established in January 1966 following an earlier post-independence government policy statement on community development and social services under the Ministry of Labour and Social Services (Department of Social Services, 1983).

The government continues to facilitate the creation of sports management bodies in the country as a commitment to developing sports. The National Sports Council regulates and controls all the sport federations in Kenya, whose main responsibility is to oversee and coordinate the activities of the federations (Mwisukha et al., 2003).

At the national level, sports activities and developments are managed through Sports Kenya (SK), whose duties and mandate are currently supervised directly by the cabinet secretary of MoSCH. SK, a state corporation established in 2013 by the Sports Act, carries out mandates and roles initially undertaken by the Sports Stadia Management Board and the sports department. It was created to manage, develop, and maintain the country's convention centres, recreational facilities, and indoor sporting venues, promote sports tourism, and assist in facilitating the coordination and implementation of international programmes related to sports and recreation. It is also mandated to develop current sport facilities and enhance existing ones. The Sports Act 2013 mandates Sports Kenya (Government of Kenya, 2013; Sports Kenya, n.d.):

1. To develop and structure relevant activities that are congruent with Sports Kenya objectives.
2. To hire attorneys and agents;
3. To work with professionals to fulfil the mandates for Sports Kenya;
4. To engage in marketing and endorsement of products and services relevant to sports and acquire commercial sponsorship;
5. To generate and offer any article or materials that bear symbols, marks or writings associated with Sports Kenya through sales or otherwise;
6. To control and regulate services provision and use of its facilities;
7. To construct and/or execute works on land conferred to Sports Kenya;
8. To assume the role of agent for any individual engaged, within or outside Kenya in provision or performance of service similar to those provided or facilitated by Sports Kenya; and

9. With the authorisation from the Cabinet Secretary, Sports Kenya can design and implement procedures relating to the safety and maintenance of stadia under its jurisdiction. Such responsibilities include
  - i. Installing structures or buildings on, close, or beneath stadia within its jurisdiction;
  - ii. Draining lands, streets, compounds, or buildings near the stadia;
  - iii. Preparing regulations for inspections of the standards of stadia, such as the level and width of playgrounds and stadia.
  - iv. Outlining procedures to remove or adjust any project or structure deemed to obstruct a stadium or pose a risk of damage or inconvenience to the stadia users. Additionally, Sports Kenya commits to delivering other informal tasks such as; teaming up with facility managers in the region or state agencies to foster professionalism.
  - v. Promoting provision and integration of recreation as part of sports in Kenya.

The National Olympic Committees, the international sport federations, and the IOC ensure their respective members are represented at the Olympic Games. Members send competitors and official representatives to promote the principles and value of Olympism. National Olympic Committee-Kenya (NOC-K) is among the 206 Olympic committees in world sports. The National Olympic Committee-Kenya was created during the 1954 Summer Olympics in Melbourne, Australia (IOC, n.d.).

The Sports Associations in Kenya are: Ajuja Association, Bowling Association, Pool Table Association, Kenya Archery Association, Badminton Association, Lawn Tennis Association, Baseball Association, Boxing Association, Netball Association, Chess Association, Cricket Association, Cycling Association, Bridge Association, Darts Association, Draught Association, Handball Association, Judo Association, Karate Association, Paralympics Association, Polo, Prisons Sports Association, Rifle Association, Roller Skating Association, Rugby Association, Scrabble Association, Swimming Association, Special Olympics Association, Softball Association, Taekwondo Association, Squash & Rackets Association, Table Tennis Association, Triathlon Association, Tug-of-War Association, Volleyball Association, Wrestling Associations among others. They are affiliated to the Kenya Sports Council and mandated to manage and represent their various sport disciplines in Kenya.

The Kenya Universities Sports Association (KUSA), initiated in 1979, was tasked with running university sports in Kenya. KUSA's objective was to create an environment and opportunities for university students to pursue sports at all levels.

KUSA acts as a national consultant supporting, conducting, and promoting sports at Kenya's university levels. Currently, KUSA has over 15 university members and over 1,000 university student participants in its University Championships. KUSA is an affiliate of NOC-K, Kenya National Sports Council (KNSC), the East Africa University Sport Federation (EAUSF), the Federation of African University Sports (FASU), and International University Sport Federation (FISU; KUSA, 2015).

#### 5.6.1.1 Sport financing in Kenya

The national government and collaborations with public corporations and private companies coordinate the funding and financing of sports activities in Kenya. The Sports Act 2013, section 12 part III provides for the formation of the National Sports Fund (Government of Kenya, 2013). This fund is responsible for raising funds that should expedite the development and growth of the sports in the county. The funds are further disbursed to facilitate training necessary sports personnel and



support the cash award scheme to enhance competitiveness among sports athletes in Kenya. The National Sports Fund was acknowledged as a flagship project in the vision 2030 and was prioritised in the 1st and 2nd medium-term development goals. This is a clear commitment of the government to elevate the sports industry as it has a great potential to create income for the youth through sports professionalism. Team Kenya has excelled exemplary well in the region, Africa, and by extension in the world championships and the Commonwealth Games over the years. The country is focused on diversifying into sports disciplines other than its traditions of long-distance running (Ministry of Sports, Culture and Heritage, 2020).

In a report released by the sports cabinet secretary in October 2021, the sports, arts, and social development fund obtained 30.3 billion KES since it was established in February 2019. These funds were primarily from betting, gaming, and lotteries. Between February and June 2019, 8.1 billion KES were collected. The fund increased by 10 billion KES in the 2019/20 financial year. However, the fund decreased to 6.8 billion KES in the 2020/21 financial year. In the current national budget for the financial year 2022/2023, the finance cabinet secretary has recommended 15 billion and 800 million KES for the sports fund. This increased from 15 billion KES handed to the fund in the previous financial year (Oruko, 2021). Table 21 summarises this information.

Table 21. Funds allocated to the Kenyan sports, arts, and social development fund (Oruko, 2021)

Financial Year	Funds Allocated in Kenyan shillings (KES)
2019/2020	10 B
2020/2021	6.8 B
2021/2022	15.8 B

Besides government funds, sport federations raise funds through sponsorship and grants, gate collections, players' contributions, and league or tournament fees, among other sources, which are sometimes unreliable.

**Financing of Sport Facilities.** The sporting infrastructure in Kenya comprises mainly sports stadia that play host to various sports such as football, rugby, and track events. Under the management of Sports Kenya, the most prominent sports stadia are the Kasarani – Moi International Sports Centre and the Nyayo stadium. Safaricom, the leading mobile operator in Kenya, acquired the naming rights in 2015 for two stadia. The Kasarani Indoor Arena has a 5,000-capacity while the main stadium has 65,000. These two venues make up the Moi International Sports Centre in the Kasarani constituency, Nairobi County. Safaricom acquired the naming rights after paying 635,000 USD and renamed the Moi International Sports Centre in Kasarani to Safaricom Indoor Arena and the main stadium, the Safaricom Stadium Kasarani-Home of Heroes, respectively (Sports Kenya, 2022).

#### 5.6.1.2 Sport policies in Kenya

In 2005, Kenya Parliament passed Sessional Paper No. 3, which operationalised the Kenyan sport policy that was proposed in 2002 and aimed at developing the sports sector. The policy was to act as a framework to guide, streamline, and harmonise sports concerning planning, management, and organisation in Kenya. However, through the succession of several government administrations, the current Sports Act 2013 has been implemented, and the following institutions (coordinating sport affairs) were formed under the Act:

1. Sport Registrar – whose role is to register and regulate sports organisations and other sports agencies representing sport in the country.
2. National Sports Fund – intended to raise and distribute funds for developing sports and recreation through sports lotteries.
3. Sports Dispute Tribunal – Acts as a mediator in case of sports disputes.
4. Kenya Academy of Sports;
  - To organise, administer and coordinate sports administration;
  - Promote research, identify, and foster the growth of talent in sports;
  - And to receive and analyse data related to training needs from sports organisations.
5. Sports Kenya replaced the Sports Stadia Management Board, hence carrying out the mandate of managing and maintaining sports facilities;
  - Establish the right ideals for the stadia;
  - License and scrutinise stadia regularly;
  - Encourages, promotes, and implements sport programmes at the grassroots level, etc.

Concerning corporate governance, the Sports Act, Second Schedule presents the framework and regulations of what should constitute sports governing bodies. Several regulations need to be adhered to (Government of Kenya, 2013):

- A board shall be elected, and the club representatives and members shall elect it.
- Eligibility for the board roles of chair, secretary general, or treasurer requires the citizenship of Kenya.
- Elections should be done after a period of between two- and four-year intervals.
- The term for board members should not exceed four years. Board members are eligible to serve for a second term, but not longer.
- The constitution envisages that any sports body seeking to be registered as a sports organisation in Kenya must conduct the election of officials and have athletes' representatives at all levels, that is, sub-branch, branch, and national levels. The constitution further directs the club members to conduct elections, and all the national sports organisation's representatives, the chairperson, secretary, or treasurer, must be a citizen of Kenya.
- The constitution further contemplates that the election shall be done at intervals of two and four years.

Therefore, the elected officials shall hold the office for a period not more than four years. However, the officials are eligible for office for one more term. The election shall be conducted within the guidelines stipulated in Article 81 of the constitution for the electoral system. The law also directs subscription to anti-doping regulations consistent with the WADA Code, submission to the National Anti-Doping Organisation anti-doping rules and policies, and subscription to the Court of Arbitration for Sports policies and regulations. The constitution also provides for subscription to the regulations outlined in the Sports Disputes Tribunal policy and rules for sports dispute resolution (Anti-Doping Agency of Kenya, n.d.). Only the registered club members are eligible to directly vote for officials at all levels, sub-branch, branch, and national levels. The Kenya team and technical personnel selection shall be conducted fairly and transparently and in good time. The selection process shall follow the guidelines for authorisation and processing of sportspersons and their representatives as the constitution provides.

Generally, the Confederation of African Football Statutes in Kenya and Africa govern football. The Confederation of African Football (CAF) outlines and specifies its purposes and philosophies in African football.

### 5.6.1.3 Licensing of football federations

The goal of licensing is to facilitate the realisation of outlined objectives. This shall support systematic football administration at the football club and federation level to promote the quality and level of football in all aspects of Africa. The licensing process also ensures all football clubs possess the proper infrastructure, information, and skills, specifically in management and organisation. Licensing further enhances clubs' financial and economic capacity through ideal corporate governance and control. The process also ensures and guarantees the continuity of football club competitions in the international games during the season. It also enables equivalent development and assessment between football clubs by ensuring relevant adherence to financial, legal, administrative, sporting, and infrastructure guidelines.

The Sports Act further established the Office of the Sports Registrar within the Public Service Commission (PSC) provision. Sports Act directs the PCS to hire a Registrar designated to the Office of the Sports Registrar. The Sports Registrar will carry out the roles assigned to the office, such as registering sports and sportspersons and arbitration of registration disputes between sports organisations. It is also the responsibility of the Sports Registrar to regulate professional sports bodies at the national level. The Registrar also keeps records of the registered sports organisations. Sports registrars issue licenses to sports organisations that comply with the guidelines prescribed by the Cabinet Secretary of Sports or any other relevant law. Unless fully registered as a sports organisation under the Act, the Act prohibits anybody from running or operating as a sports organisation. Sports organisations are registered and licensed as county sports associations, national sports organisations, or sports clubs.

The Sports Act stipulates that any sports organisation licensed under the Sports Act is open to membership and leadership for members of the public. The registration certificate is deemed as sufficient evidence of authority to run the sports organisation in any part of Kenya as spelled out in the permit and have such items and regulations as the Registrar of Sports may suggest. The Act is also the base foundation of the Sports Dispute Tribunal (Tribunal). The Act outlines that the Sports Dispute Tribunal will encompass memberships approved by the Judicial Service Commission (JSC) in liaising with the national sports organisations. The members shall comprise a chairperson, an individual who is competent to be a judge of the High Court of Kenya and have a minimum work experience of seven years, especially in sports-related matters, or has been involved in sports in any capacity with an experience of at least ten years (Ohaga & Kosgei, 2022).

The Sports Act further outlines the Tribunal's jurisdiction. It's within the Tribunal's jurisdiction to decide on the appeals against verdicts arrived at by national sports organisations or their representatives. However, the concerned parties can appeal the Tribunal decisions regarding the issue. It is also the jurisdiction of the Tribunal to listen to and decide on the appeals from conclusions made by the Registrar of Sports under the Act.

The Anti-Doping Act also stipulates the Tribunal's authority specifically on anti-doping matters. The Tribunal is, therefore, mandated to make decisions related to anti-doping rule violations for sportspersons and athlete support personnel and concerns associated with various adherence of sports

organisations. The Anti-Doping Act stipulates that the Code, the Sports Act, the 2006 UNESCO convention against doping, the Agency's Anti-Doping Rules, and other relevant legal sources shall inform and guide the Tribunal's decisions (Anti-Doping Agency of Kenya, n.d.).

An employee is specified as an individual hired and receiving a salary or wages. Athletes and sportspeople earn a salary or wages and are therefore an employee of the sports entity in question. The Sports Act further applies to an individual working for a proprietor under a contract of service. Such individuals include people working or hired by sports clubs.

The Sports Act postulates the requisite general values that must be applied, including in hiring athletes. The values or principles include a ban on forced labour, sexual harassment, and workplace discrimination. The law further establishes that all service contracts must be under the Sports Act. The Sports Acts also lays down stringent requirements relating to the contract's content. Specifically, it stipulates that a written agreement shall include the employee's name, sex, age, and address. It further states that the contract shall have the employer's name, job description, date of commencement, and the form, as well as the expiration period of the contract (Ohaga & Kosgei, 2022).

#### 5.6.1.4 Sport participation in Kenya

In Kenya, various federations organise sports competitions in conjunction with the Sports Council. The Ministry of Education manages and draws the Kenya Secondary Schools Sports / Games Calendar (KSSSA) as well as that of Primary sports every term from inter-schools to national competitions (Media Team @Educationnewshub.co.ke, 2022). Other notable sports associations that thrive well in the country include Kenya Rugby Sevens, Athletics Kenya, swimming federations, football, volleyball, etc.

Kenya Rugby Union (KRU) was formed in 1970 and is tasked with managing and regulating professional rugby in Kenya. KRU coordinates with Rugby Africa and is also an affiliate of World Rugby. KRU is also responsible for running rugby competitions for national teams, domestic clubs, and schools (Kenya Rugby Union, n.d.). The union has been successful over the years.

Athletics and football are some of the oldest modern sports in Kenya, and they were introduced in the country around 1922. In athletics, Kenya has won major international events such as Olympics, and Commonwealth Games, mainly in marathons, 10,000m, 5,000m, 3,000m, steeplechase, and 800m. The four-time women's Boston Marathon winner and two-time world champion Catherine Ndereba, former Marathon world record-holder Paul Tergat, and John Ngugi are some of the best-known athletes.

Athletics Kenya (AK) is responsible for managing athletes, mainly in athletics (track and field). AK is an affiliate of World Athletics and the confederation of African athletics. AK assists athletes in international athletics competitions through proper coordination and facilitation. The AK has organised successful sport competitions in Kenya over the years amid bias and discrimination in its selection of world championship teams (Athletics Kenya, n.d.).

The Kenya Volleyball Federation (KVF) was established in 1964 to identify, nurture, support, and facilitate the growth of volleyball talent in Kenya. KVF is a member of the Kenya National Sports Council (KNSC), NOCK, and the Confederation of International Volleyball (FIVB). KVF also oversees

participation, inspires development, and organises volleyball competitions in schools, colleges, and higher institutions. It also plays a vital role in developing technical persons (referees and coaches) in Kenya. Kenya women's volleyball team (Malkia Strikers) has been vetted among the best in Africa at the club and national levels. Malkia Strikers has won the African Cup of Nations and the All African Games once each. The team has also been selected repeatedly to represent Africa at the Olympics (Kenya Cradle, 2021).

Kenya has a grown reputation for athletics, specifically long and middle-distance running. However, its recent popularity in the field events, javelin and sprints, 100 meters by Yego and Omanyala respectively, have made Kenya intensify its interest in sports. Sports in Kenya are essential to the country's global image. Therefore, adherence to sports law and administrative requirements by sports regulatory agencies, both local and international, is vital to the country's endeavours in sports.

However, several doping cases were detected. This placed Kenya on the watch list of the World anti-doping agency (WADA) and threatens Kenya's long-term reputation. The mismanagement of federations in Kenya is also threatening to discourage athletes. Moreover, there is a threat to be banned by international governing bodies (e.g., FKF after the interference by the government on the allegations of corruption cases by its officials). Kenya has a very rich diversity in sports. It has a great potential to advance its sporting profile beyond the traditional sports, which identify the country on the international stage. The current strategies of the MoSCH to develop the status of sports are impressive. Previous professional sports such as World rally championships and golf tournaments have been introduced and attracted international attention. However, different stakeholders in the national sports structure need to be more proactive by enforcing professional standards which improve the sporting quality, lifestyle, and welfare of professional athletes in the country. That will encourage participation in sports by different demographics across the country.

### 5.6.2 Country profile

The Republic of Kenya is located in Eastern Africa. With its 55 million inhabitants, the country generates a gross domestic product of roughly 110.3 billion USD per annum. Hence the GDP per capita approximates roughly 2,007 USD (The World Bank, 2022b). The most significant contributors to Kenya's GDP are the service sector, agriculture and the industry (The World Bank, 2022b). In 2021 54.41% of Kenya's GDP could be attributed to the service sector, 22.43% to agriculture and 16.99% to the industry sector. In 2019, 54.3% of the Kenyan workforce was employed in the agricultural sector. Hence, they were involved in agriculture, hunting, forestry, and fishing (The World Bank, 2022b). The Gini-Index of 40.8 indicates a medium distribution of income. The share of the labour force without work but available for and seeking employment is 5.74%. However, the share of youth not in education, employment or training is comparably high at 19.67% (The World Bank, 2022b). Figure 24 presents an overview of the economic importance of sport in Kenya.

## Info sheet on the economic importance of the sport sector and the employment situation

### KENYA

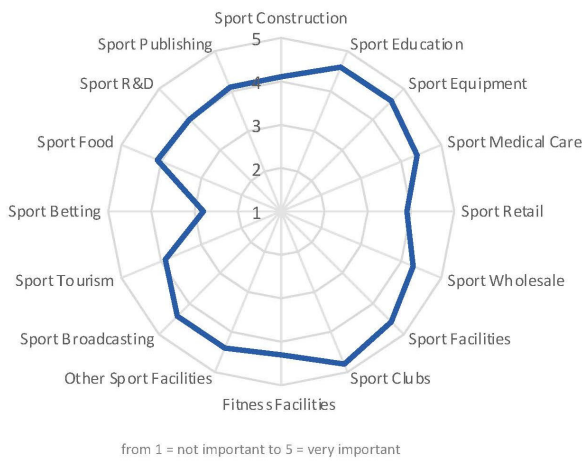


Figure C1-1. Importance of the sport sub-sectors for the economy

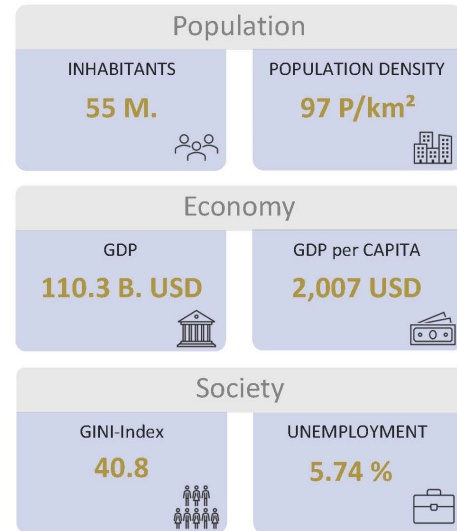


Figure C1-2. Country information

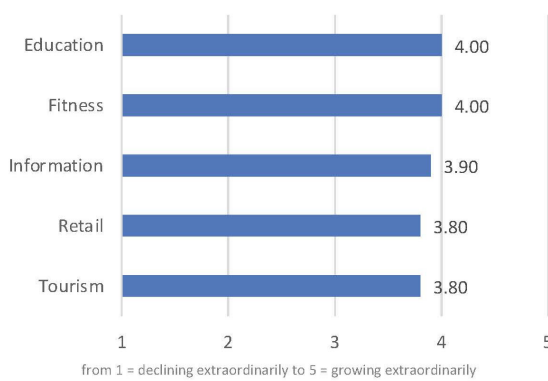


Figure C1-3. Growth potential of the sport sub-sectors

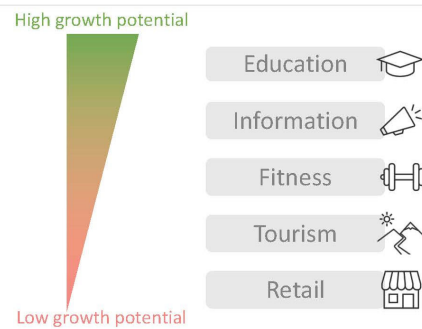


Figure C1-4. Ranked growth potential of sport sub-sectors



Figure C1-5. Average number of qualified applicants per job opening



Figure C1-6. Difficulty to find qualified employees



Figure C1-7. Importance of the sport sector as an employer

n = 10; Average years of professional involvement in the sport sector (M = 14.6 years)

Figure 24. Economic importance of and employment situation in the sport sector of Kenya

The experts described a range of investments in the sport sector in Kenya. It was noted that the establishment of the Sports Fund encouraged investments. In addition, a high potential for local manufacturing of sport equipment was attested by one expert. Beyond this, talent development investments yielded a broad spectrum of professional athletes. It has been pointed out that the education sector has been supported through a novel policy which emphasises the importance of physical activity for the holistic development of the pupil. In Kenya, establishing the physical education and sports policy in 2021 marked a new perspective on physical education in schools. The

policy highlighted “issues of P.E and sport infrastructure, curriculum, teacher development, talent identification and nurturing, resource mobilisation, quality assurance, governance and management, monitoring, evaluation, reporting and learning” (Ministry of Education, 2021, p. viii). In addition, the policy embraced a multi-agency approach in applying the stipulated strategies. Similarly, academic institutions invest money in the scientific evaluation of sport.

One expert concluded that the sport sector's investments were growing in various sub-sectors. For instance, sporting equipment manufacturing (e.g., balls or gear) has increased in Kenya. Multiple experts agreed that the investments in infrastructure (e.g., stadia or private facilities) had increased drastically over the last few years.

Nevertheless, challenges remain in the development of the sport sector in Kenya. The experts reported that the existing legislation limited the development of the sport sector. The existing sports sector policy has been described as “corrupt and nepotism” and a “red tape bureaucracy”. In addition, the experts pointed toward a lack of funding and financial constraints. The professionalism of government officials and their capabilities in developing the sport sector was questioned. Finally, high costs for international shipments and a lack of usable infrastructure for sport tourism were outlined. An investigation of the challenges per sub-sector highlighted that the sport tourism sub-sector lacks private investments and has to deal with the bad condition of the existing sport infrastructure. The sport fitness and sport education sub-sectors are confronted with a lack of government funding and support. The sport education sub-sector requires additional private investments. Similarly, the sport retail sub-sector seeks more private investors.

The experts outlined a range of large-scale sport events (more than 10,000 spectators) that have recently been staged in Kenya. These events include the IAAF World Youth Championships in Athletics and various football and rugby matches. Moreover, the Lewa Marathon and the Nairobi Marathon were mentioned. Figure 25 highlights past and upcoming sport events in Kenya.

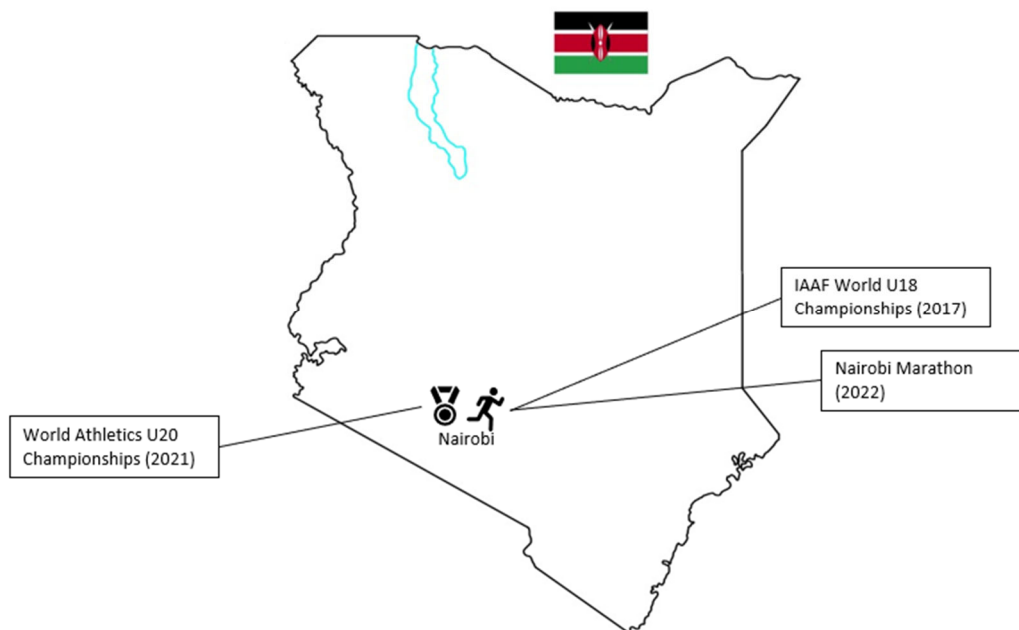


Figure 25. Past and upcoming large-scale sporting events in Kenya

### 5.6.3 Social and cultural relevance of sport

According to the three interviewees from the public and for-profit sector, sport plays an important role in the Kenyan society. The sporting landscape is as diverse as Kenya's natural landscape, with different regions having different popular sports. In Rift Valley, athletics are popular, in the so-called Lake Belt rugby and football dominate, the Western regions have athletics, and the coast has beach games and swimming events. Overall, the main spectator sports are football, athletics, volleyball, basketball, handball, and rugby. While the most popular spectator sports are team sports, many young people practise athletics as they see it as a potential source of income or a way to success. While being a leisure activity, sport is also a unifying factor that has given a platform for a national identity, in addition to tribal affiliation.

*“I would say that, when you look at our culture, sport has actually been the backbone of unity [...] I remember, or rather I have seen as participating on this international platforms, it has really diffused the issue of tribalism a lot [...] Because when you wear the Kenyan colours, nobody cares about your tribe” (KEN2FPR)*

Sport was also described as a significant catalyst for the youth. Famous athletes often return to their homes and invest in training centres or projects to support the youth, tackling issues such as drug addiction, early pregnancies, crime, etc. Girls and women still face higher barriers to sport participation than their male counterparts. They are often stopped from participating in sport for cultural reasons or need a female chaperone to participate in events. There is also a steep drop-off rate after high school, with married women disappearing from sport and physical activity. It was mentioned that the government attempts to create more gender balance and opportunities for women. For example, the Ministry of Education aims to ensure equal participation in sport and physical education at schools.

### 5.6.4 Economic potential and trends in the sport sector

There are no official numbers or research on the contribution of the sport sector to the Kenyan economy. However, one interviewee estimated that most sport organisations in Kenya do not make profit.

Through the Ministry of Sport the government has set up the Sports, Arts and Social Development Fund (SASDF). Thirty per cent is dedicated to sports organisations. Sport federations, for example, can apply for funding and sponsorship. The National Olympic Committee plays an important role and also provides funding to federations and clubs.

Infrastructure at the grassroots level is often poor, posing a challenge to developing grassroots sports. Athletics receives investment from government and private investors, like former champions, and can provide financial opportunities for athletes and coaches. Football is another sport that sees investment from the government side, especially regarding facilities.

*“And you realise that in Kenya facilities are owned by the government [...] There isn't a single club or federation that owns a sporting facility.” (KEN3PUB)*

The public authorities largely control the sports activities in the country. Overall, the private sector in Kenya is not very strong. Thus, sport tourism is not yet well developed – though there is potential



due to the events that take place and will take place. Where there are private agents, there can often be issues of exploitation of athletes. There is currently no effective system for registering and controlling agents and managers. Thus, athletes can be taken advantage of, lose their prize money, or get doped without their knowledge. Overall, a lot of the sector's potential remains untapped.

#### 5.6.5 Education and employment

According to interviewees, Kenyan universities have developed strong sports programmes in physical education, sport management, sport administration and management, human resource management, and physical education management in recent years. While sport has been overlooked for a long time, many people are starting to view it as a viable career option.

The biggest employers in the sport sector are government institutions such as the Ministry of Sport, the national anti-doping agency, Sport Kenya, and public schools. A degree is mandatory to enter government service. However, the local market cannot absorb all graduates. Another challenge is the employment and education of former elite athletes. They usually do not have university degrees, and as there are currently no programmes to develop their competencies while they train, they can face issues like unemployment and poverty after they finish their athletic careers.

Marketing and resource management were mentioned as important competencies for the sport sector. Competencies still missing are qualifications for jobs in athletes' technical staff, such as coaches, trainers, nutritionists, and psychologists. The interviewee saw potential in these areas to develop local expertise rather than importing it from abroad.

*“That’s why you find that, like in football, you always bring expertise from outside the country. So I think in coaching, in whatever sport federation, we may need to develop our skills more, so that we are more competitive in the world” (KEN3PUB).*

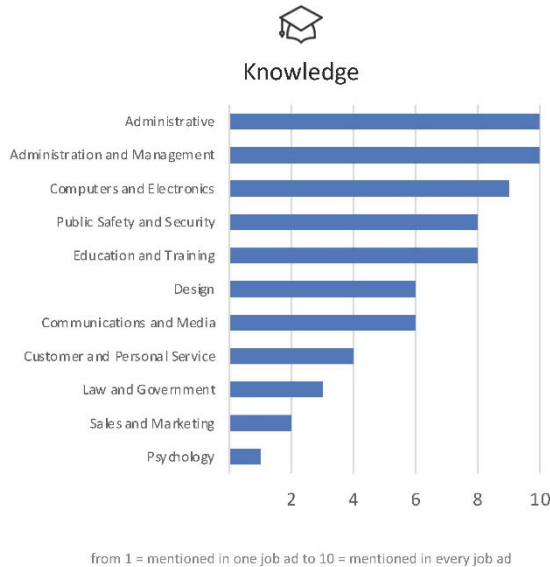
Some Kenyans also join universities abroad to further their education and competency development in sports-related subjects.

### 5.6.6 Competencies for the sport sector

Obtaining the appropriate competencies can facilitate individual success in the job market. Ten job ads were analysed to investigate which competencies are likely to yield successful applications in Kenya's sport sector. The analysis focused on knowledge attributes, skills, abilities, and other competencies (see Figure 26).

#### Central competencies for sport sector jobs in

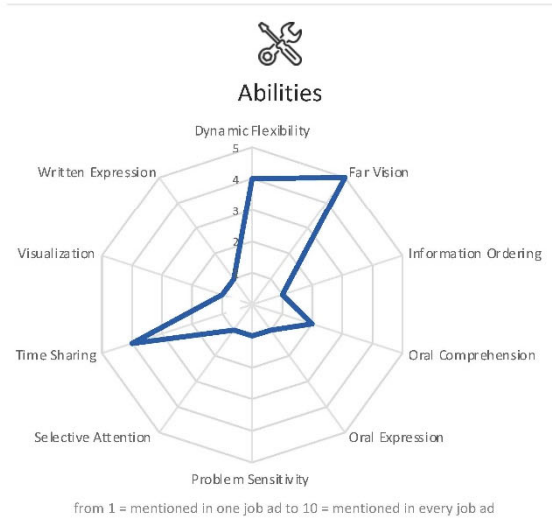
#### KENYA



from 1 = mentioned in one job ad to 10 = mentioned in every job ad  
Figure P1-1. Frequency of knowledge attributes in sport sector job offers



from 2 = mentioned in two job ads to 10 = mentioned in every job ad  
Figure P1-2. Frequency of skill attributes in sport sector job offers



from 1 = mentioned in one job ad to 10 = mentioned in every job ad  
Figure P1-3. Frequency of ability attributes in sport sector job offers



Larger font is equivalent to higher frequency  
Figure P1-4. Representation of other competencies in sport sector job offers

Ten current (2<sup>nd</sup> quarter 2022) job offers were analysed to assess the required competencies in the national sport sector. The frequencies result from matching the job offers with a set of defined competencies. Job titles of the analysed job offers: Head of Sports Studies – MPESA Foundation Academy; Sports Officer KCAA; Wellness Officer Lake Turkana Wind Power; Head of Sports SABIS International School; Fitness Instructor South Fitness Limited; Stadium Manager Migori County; Recreation & Sports Officer African International University; Gym Manager Millenium Gyms & Studios; Sports Development Director Uasin Gishu County; Sports Coordinator Nova Pioneer School Tatu

Figure 26. Central competencies for sport sector jobs in Kenya

Nine of the ten analysed job ads stated that applicants require administrative and management knowledge. Hence, individuals should acquire knowledge of business and management principles in strategic planning, resource allocation, human resources modelling, leadership technique, production methods, and coordination of people and resources. Complementing this, job candidates likely benefit from the knowledge of administrative, office procedures, systems such as word processing, managing files and records, stenography and transcription, designing forms, and workplace terminology. Furthermore, understanding media production, communication, and dissemination techniques and methods might increase the chances of a successful job application in Kenya's sport sector.

The analysis of skills marked four vital attributes. These four attributes mentioned in 90% of the analysed job ads were monitoring, management of personnel resources, management of material resources and time management. Consequently, applicants should be able to assess the performance of themselves, others or the organisation to make improvements or take corrective action. Moreover, people's monitoring, development, and direction in the workplace were vital skills. Similarly, obtaining and seeing the appropriate equipment, facilities, and materials needed to do certain work is a crucial skill for individuals. Furthermore, individuals ought to be able to manage their own time and the time of others effectively.

All analysed job postings highlighted three vital other competencies. These were achievement, effort and leadership. In other words, applicants should be result-oriented and use their strongest abilities. Furthermore, applicants should establish and maintain personally challenging goals and exert effort toward mastering tasks. Finally, employers in Kenya were looking for individuals willing to lead, take charge, and offer opinions and direction.

## 5.7 Pakistan

### 5.7.1 National sport system of Pakistan (Author: Uzair Fazl-E-Umer)

The Pakistan Sport Board (PSB), the unit of the Ministry of Education, recognises 40 national sport federations. The Pakistan Sport Board and the Pakistan Olympic Association collaborate to promote sports. The PSB acts as an umbrella organisation for national sport federations. Figure 27 illustrates the relationships among governmental and non-governmental entities in sports.

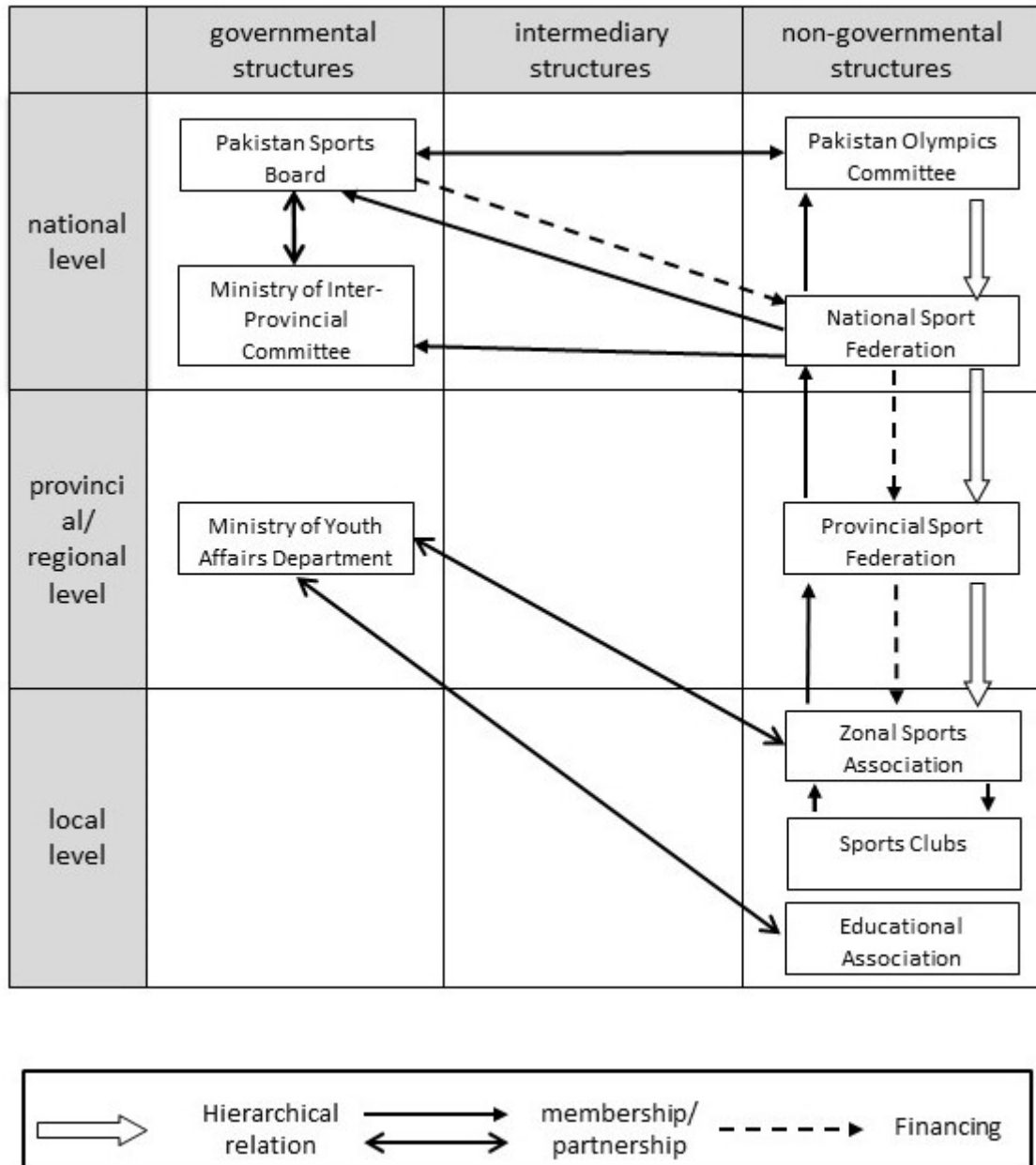


Figure 27. Structure of the national sport system of Pakistan

**Pakistan Sport Board.** The PSB was established under the Ministry of Education in 1962. It promotes sports and develops a competition system in line with international competitions such as the Olympic Games or the Commonwealth Games. Moreover, it is responsible for regulating and controlling sports nationally in Pakistan. The PSB, the supreme sports body, controls and monitors the affairs of the national sports federation all over Pakistan. The PSB also assists in devising sport policies for its member federation under the supervision of Ministry of Inter-Provincial Coordination (IPC; Pakistan Sports Board, 2022a). Moreover, one of the roles of the PSB is allocating funds to the affiliated national sport federation and ensuring the proper utilisation of funds and special grants given to them. The PSB also ensures the availability of sports facilities for athletes to prepare for international competitions. Furthermore, the PSB assists the national sport federations in selecting the national team of Pakistan. Finally, the PSB is responsible for constructing sport complexes for the games in all the districts (Pakistan Sports Board, 2022b).

**Pakistan Olympic Association.** The Pakistan Olympic Association (POA) was established in 1948 as the first sports body to ensure the participation of Pakistan at the Olympic Games. The POA serves as the National Olympic Committee (NOC) of Pakistan. Serving as the NOC of Pakistan, it is the first contact point between the IOC and Pakistan. The POA was the only sports body regulating sport in Pakistan from 1948 until the PSB was established in 1962. The major responsibilities of the POA include bringing athletes to regional, Asian Games, Commonwealth Games and Olympic Games and organising national games every two years (Pakistan Olympic Association, 2022).

**Ministry of Inter-Provincial Coordination (IPC).** The instability at the political level and the transfer of power brought several changes to the structure of sports in Pakistan. In 1977, the administrative control of the PSB was given to the Ministry of Culture, Sports, and Tourism. However, the administrative control again shifted to another Ministry in 2008, called the Ministry of Interprovincial Coordination, as the Ministry of Sport was dissolved. Now, the Ministry of Inter-Provincial Coordination is responsible for the administration of the affairs of the Pakistan Sports Board and facilitating PSB in forming sport policies for national sport federations throughout Pakistan (Pakistan Sports Board, 2022b).

**Ministry of Youth Affairs Department (MYAD).** Pakistan has four provinces, each with its own 'Ministry of Youth Affairs' Department. The Youth Affairs Department is an independent governmental organisation reporting to the provincial government. The Ministry of Youth Affairs Department is responsible for promoting sports at the grassroots level and organising tournaments at the inter-club level and association level. Consequently, it aims at creating a pool of talent from the local district to compete at the provincial and the national level. The Ministry of Youth Affairs Department's funding comes from the provincial government. They also receive international funding to support sport development initiatives at the level of the clubs, the associations, and the educational institutions (Government of Sindh - Department of Youth Affairs, 2022).

### 5.7.2 Country profile

The Islamic Republic of Pakistan is a country in South Asia. With its 225 million inhabitants, it is the fifth most populated country. Pakistan generates an annual GDP of approximately 346.3 billion USD (The World Bank, 2022b). The equivalent GDP per capita attributes to 1,538 USD. Large parts of Pakistan's semi-industrialised economic power can be attributed to the service industry, agriculture and industry (e.g., large-scale manufacturing). In 2019, 36.9% of the Pakistani workforce was employed in the agricultural sector. Hence, they were involved in agriculture, hunting, forestry, and fishing (The World Bank, 2022b). The Gini-Index of 29.6 indicates a medium to a high level of economic equality (The World Bank, 2022b). The youth unemployment rate was 11.1 % (The World Bank, 2022b). The share of youth not in education, employment or training equated to 34.6 % in Pakistan. Pakistan's educational attainment rate (at least finished primary education) was 55.1% for men and 42.4% for women in 2019 (The World Bank, 2022b). Figure 28 presents an overview of the economic importance of sport in Pakistan.

## Info sheet on the economic importance of the sport sector and the employment situation

### PAKISTAN

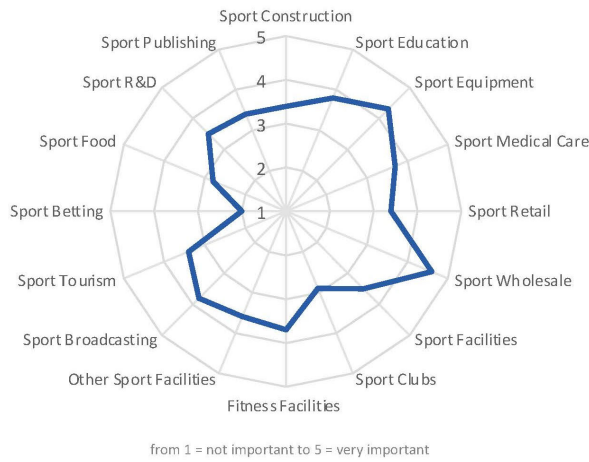


Figure C1-1. Importance of the sport sub-sectors for the economy

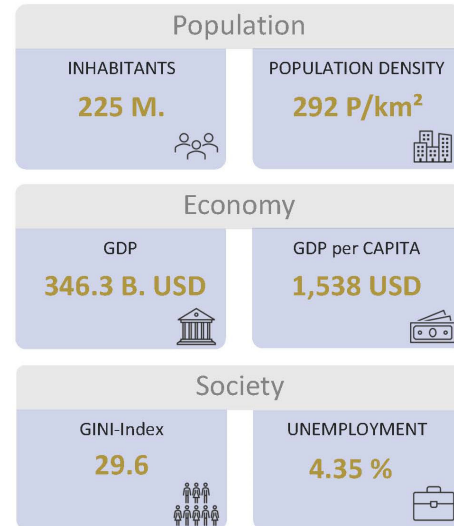


Figure C1-2. Country information

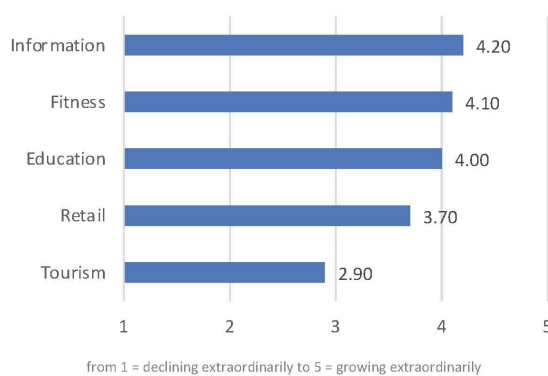


Figure C1-3. Growth potential of the sport sub-sectors

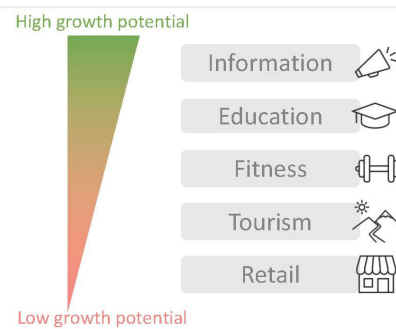


Figure C1-4. Ranked growth potential of sport sub-sectors



Figure C1-5. Average number of qualified applicants per job opening



Figure C1-6. Difficulty to find qualified employees



Figure C1-7. Importance of the sport sector as an employer

n = 10; Average years of professional involvement in the sport sector (M = 8.17 years)

Figure 28. Economic importance of and employment situation in the Sport sector of Pakistan

The survey respondents stated that Pakistan's sport sector is seeing an increase in commercialisation, generating novel sport sponsorship opportunities. However, the tense economic situation in Pakistan inhibited the further commercialisation of the sport sector. Beyond this, the fitness sector was booming as individuals became more aware of the health benefits of sport. The Covid-19 pandemic has amplified this trend. This boom can be observed in the professionalised approach fitness centres are taking. However, one expert reported that the lack of highly trained professionals limits professionalisation. One respondent stated that strategic implementation of youth sport is an issue

Pakistan's sport sector is currently facing. Moreover, it has been pointed out that eSports are gaining popularity as the youth replaces physical sport with eSports.

The survey participants described that various universities and sport associations develop and enhance their indoor and outdoor sport facilities with the help of public and private funding. In contrast, it has been noted that investments in the sport sector were event-focused. The event-centred investment limited the ability to invest in socially desirable projects. This included youth sports, grassroots sports and sports in remote areas. Furthermore, an increase in commercial and recreational sport facilities (e.g., small multi-purpose sport fields, gyms and personal training spaces) was reported. Moreover, organisations progressively utilised sport for CSR projects and partnerships.

The respondents stated a range of difficulties they would face when tasked with developing Pakistan's sport sector. The participants frequently mentioned that budget constraints significantly hindered sport sector development. This included the availability of sport budgets as well as resource mobilisation. Moreover, the central Pakistani government seemed to lack interest in developing the sport sector. This resulted in limited funding and a lack of sport policies. Moreover, the government was considered stuck in a bureaucratic structure that blocked the development of a long-term strategy. One participant stated that government departments were unwilling to develop the sport sector and the required competencies. One respondent extended the notion of lacking government interest to the overall society by stating that sport people's mindset hinders the development of the sport. More precisely, convincing stakeholders (sponsors, the general public, and the government) that sport beyond cricket has a huge potential is demanding. Finally, corruption was mentioned as a problem in the development of Pakistan's sport sector.

Furthermore, the survey explored the challenges the five sport sub-sectors currently face. Reportedly, the sport tourism sub-sector lacked government funding and support. Moreover, the lack of existing infrastructure and difficulties accessing existing infrastructure limited the growth potential of the sport tourism sub-sector. The sport fitness sub-sector also required additional government funding and support for its development. The sport education sub-sector was missing skilled employees and government funding for its development. Moreover, the poor condition of the sporting infrastructure limited the development opportunities of the sport education sub-sector. Similarly, the sport information sub-sector required more skilled employees and government funding. Finally, respondents reported that sport retail had a dramatic lack of skilled employees.

Identifying employees that add value to the organisation was an integral part of all sports organisations. The survey asked participants about employment trends in Pakistan's sport sector. One respondent stated that most qualified individuals were employed as sport teachers in schools or as trainers in sports clubs. However, the earning potential was minimal, which decreased the jobs' desirability. Moreover, individuals working in the private sector often had to endure job uncertainty due to the poor economic situation. One individual stated that an entrepreneurial mindset can be observed in the sport retail and fitness sub-sector.

Investments in Pakistan's sport sector that have been described primarily evolved around professional cricket and the necessary infrastructure. For instance, the building of the cricket stadium in Karachi was realised through private funding. The survey participants described no additional investments.



Hosting major sport events can positively influence various aspects of a country. The majority of sport events that attracted more than 10,000 spectators in Pakistan have been cricket matches. The Pakistan Super League is the professional cricket league in Pakistan. As such, it organises six teams representing six different cities. Besides that, the Shandur Sports Gala (a polo tournament) attracts spectators annually. In the subsequent years, the South Asian Games and the ICC Championship trophy will be held in Pakistan (see Figure 29).



Figure 29. Past and upcoming large-scale sporting events in Pakistan

### 5.7.3 Social and cultural relevance of sport

The four interviewees from the voluntary and for-profit sectors described Pakistan as a country that cares about sport as a cultural phenomenon and entertainment but not necessarily as an important activity in daily life. Physical education in schools is not mandatory, except in some private schools. Sport is often seen as a recreational, optional activity, thus not given much importance in the education environment.

People practise different sports, like football, volleyball, basketball, tennis, badminton, and cricket, either in private clubs or informally in playgrounds and parks. Other sports mentioned were mountain climbing and amateur snooker, as well as eSports and gaming, which had become hugely popular, especially with the younger generation. Access to organised sport was not affordable for everyone and is mainly reserved for the upper middle class. Fitness and bodybuilding had also increased in popularity, but access to gyms was not affordable for most. Overall, grassroots sports were described as lacking and not developed enough.

Regarding passive participation, cricket was the most watched sport in the country. The government-owned channel PTV sports and private channels like GEO Sports and A-Sports dedicate their broadcasting time overwhelmingly to cricket. Other sports are hockey, squash, football, and the popular team sport kabaddi. Overall, viewers tend to watch international events more than national events.

*“Number one is cricket in Pakistan. But that is not an Olympic sport, but they are self-sufficient. They are doing it excellently.” (PAK1VOL)*

While cricket often engaged the entire country, other sports lagged. However, regional authorities and NGOs made efforts to use sport as a tool for inclusion and social cohesion. Special Olympics Pakistan, for example, promoted unified sport for people with and without disabilities.

#### 5.7.4 Economic potential and trends in the sport sector

According to the interviewees, the sport sector in Pakistan is not as developed as in other countries. Although there is a Ministry of Sport, the support at the national level was described as insufficient, with less than one per cent of the total budget allocated to sport. On the provincial level, some positive examples, like the Punjab Ministry of Sport and the government of the Gilgip-Baltistan Province were mentioned.

Except for the Cricket Board, the level of professionalism of federations was evaluated as low. Changing leadership within government and federations has led to inconsistency and stalled development in the sector.

*“[...] the federations, the associations, all of those, I think that is where Pakistan has maybe been lacking to an extent in terms of the professionalism and in terms of the capacity of these federations and associations to really further the sport.” (PAK2FPR)*

The private sector is involved in sport through sponsorships and Corporate Social Responsibility (CSR) activities. Corporations like McDonald's, Palmolive, Unilever as well as a biscuit company and a financial investment company, were mentioned by interviewees as sponsors and CSR partners for sports organisations. As a law prescribes 3% of corporate budgets to go into CSR, there is potential to increase the involvement of corporations in sport.

Pakistan produces a lot of sportswear for export and the local market. Especially the city of Sialkot in the province of Punjab is a production hub. Synthetic sports surfaces for basketball and tennis need to be imported at a high cost from Europe since imports from neighbouring India are often not possible due to political tensions.

It was pointed out that the fitness industry has been gaining a lot of prominence, and private gyms have been growing in numbers. Sport broadcasting is primarily focused on cricket. E-commerce platforms have also started to broadcast cricket on some occasions. Esports have become very popular amongst the youth and are a growing market.

One interviewee saw potential in sport tourism, especially in Pakistan's mountainous regions. Sports like mountain climbing, skiing, snowboarding, mountain biking, and motor cross can all be practised in that area. Red Bull has started to explore the potential for organising extreme sport events in the region. On the southern coast, there are possibilities to do watersports. However, a lack of infrastructure presently makes it hard to explore that potential commercially.

### 5.7.5 Education and employment

In public schools, sport is often not more than an extracurricular activity for most students. Only a few top-tier schools provide the opportunity to combine high-level sport with education. In addition, Special Olympics Pakistan have set up school programmes in more than 400 mainstream and special education schools to ensure children's regular sport participation. Certain universities, like Punjab University, offer physical education and sports science programmes. However, there are currently no sport management or administration programmes in Pakistan.

Internships and work experience in sports organisations are hard to come by, which hampers capacity building for young employees. In addition, even skilled and competent individuals often meet high barriers to accessing quality employment opportunities in federations and other sports governing bodies.

On the other hand, one interviewee pointed out the difficulty for sports organisations to find good coaches. They named the training of coaches an inhibiting factor. While some coaches have practical experience, they may lack formal education; others only have theoretical knowledge with little or no coaching experience. Other important competencies that people wishing to work in the sport sector should have were listed by interviewees as interest and passion for sport, digital skills, and willingness to adapt and innovate. As there are no formal sport management or administration degrees, sport organisations tend to employ graduates from either physical education or business studies, as well as people with any sport experience.

High-level athletes also struggle to finance their sporting careers. There is little support from sport federations or the government, resulting in athletes financing their careers on their own or with the help of their families, even at the Olympic level.

*“Even at the Olympic level, they're all doing it privately. The government is not involved. All the Federation is supposed to do is to produce the athletes and then give them to the Olympic association.” (PAK3VOL)*

Organisations like Pakistan Railway, the water and power department, and the army have sports teams that offer jobs and stability to some high-level athletes. Through their sports teams, individuals can pursue their sport, and then progress further on a national or international level. Another initiative connected to sport and employment is the collaboration between Special Olympics Pakistan and the Network of Organisations Working For People With Disabilities Pakistan (NOWPDP), based in Karachi in the Sindh Province. Together, they offer a networking platform providing vocational training and job opportunities for people with physical and intellectual disabilities.

### 5.7.6 Competencies for the sport sector

Finding success in the employment process is linked to individual competencies. The appropriate set of knowledge, skills, abilities, and other competencies can enhance the chances of a successful job application. Ten jobs were analysed to determine which competencies aid a successful application in Pakistan's sport sector (see Figure 30).

## Central competencies for sport sector jobs in PAKISTAN



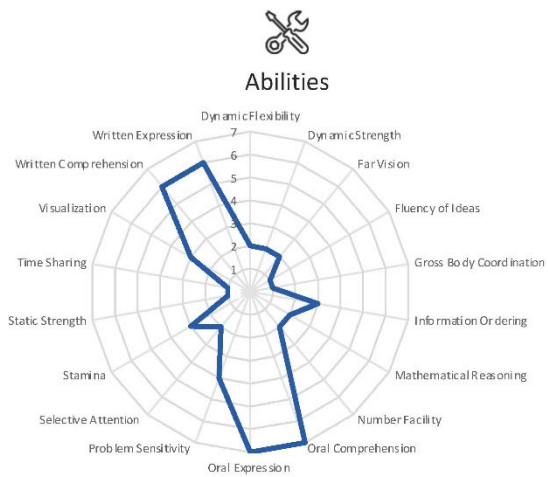
from 1 = mentioned in one job ad to 10 = mentioned in every job ad

Figure P1-1. Frequency of knowledge attributes in sport sector job offers



from 2 = mentioned in two job ads to 10 = mentioned in every job ad; man. = management

Figure P1-2. Frequency of skill attributes in sport sector job offers



from 1 = mentioned in one job ad to 10 = mentioned in every job ad

Figure P1-3. Frequency of ability attributes in sport sector job offers



Larger font is equivalent to higher frequency

Figure P1-4. Representation of other competencies in sport sector job offers

Ten current (2<sup>nd</sup> quarter 2022) job offers were analysed to assess the required competencies in the national sport sector. The frequencies result from matching the job offers with a set of defined competencies. Job titles of the analysed job offers: Director Pakistan Super League; Strength and Conditioning Coach; Teacher - Sports / Physical Education; Accounts Officer; Head of Fan Engagement; Sports Coordinator; Assistant Sports Officer; Sports In Charge; Sports Supervisor; Sports Trainer

Figure 30. Central competencies for sport sector jobs in Pakistan

The analysis indicates that administration and management knowledge was mentioned in more than 70% of the job ads. Hence, it can be assumed that knowledge of business and management principles, strategic planning, resource allocation, human resources modelling, leadership techniques, production methods, and coordination of people and resources are sought after by employers. Moreover, education and training, as well as administrative knowledge, were mentioned in more than half of the analysed job ads. Thus, applicants should have knowledge of principles and methods for curriculum and training design, teaching and instruction for individuals and groups, and the measurement of training effects. Beyond this, organisations sought candidates proficient in office procedures and systems such as word processing, managing files and records, stenography and transcription, designing forms, and workplace terminology.

Four skills appeared vital for success in Pakistan's sport sector. These were time management, coordination, speaking, and writing. These four skills were mentioned in at least 70% of the analysed job ads. Hence, managing time, adjusting actions concerning other actions, conveying information effectively and communicating appropriately in writing were essential skills in Pakistan's sport sector.

Regarding individual abilities, oral and written communication appeared essential. This included oral expression and oral comprehension, as well as written expression and written comprehension. All four outlined abilities were mentioned in at least 60% of the analysed job ads.

Finally, support, relationships, working conditions, and social orientation were other competencies mentioned in at least 80% of the analysed job ads. Therefore, job candidates ought to offer supportive management that stands behind employees, provide service to others, work with co-workers in a friendly, non-competitive environment, and value providing service to others and working with co-workers in a friendly, non-competitive environment. Moreover, individuals should prefer to work with others rather than alone and be personally connected with others on the job.

## 5.8 Senegal

### 5.8.1 National sport system of Senegal (Author: Fatou Binetou Ba)

#### 5.8.1.1 The sport system and structure of organised sport

Senegal has been a nation of sport way before its independence in 1960 from the French Republic. During colonisation, sport participants were registered under organised institutions such as "Foyer France Sénégal". This institution is known today as the "Jaraaf" club (a football and basketball club, alongside other sporting activities). Young sportsmen were playing multiple sports. Basketball, athletics, and football were the most popular sports. Back then, sport was considered a means to stay fit and express themselves as young abled pan African hungry for independence. Participating and performing in continental or international competitions was strategic and political then.

Following the 1960s, when Senegal was organising its political and governmental institutions, it still considered sport a priority and wished to keep the success of young sportsmen and sportswomen. The generation that played sport from youth became directors, managers or heads of youth and sport departments within the government. For more than 40 years, the title of the Ministry in charge of implementing the sport policy had changed several times due to the evolution of the

missions given to this department. Indeed, education-related and youth, cultural and leisure activities have been united in the same department with sport through time. The past experiences had limits, leading to a change of plan and strategy when considering the importance and the existence of a sport policy.

In the beginning of the 2000s, with a new government, given the performances and successes of the national teams at Football Cup of Nations and World Cup, a specific department was dedicated to sport. According to décret N°2003-293 du 8 mai 2003 (Government of Senegal, 2003), the new organisational system was meant to bring better management, investment, human resources, and performance. In 2002, the Ministry of Sports was created to be operating on its own with very specific sub-sections:

- training and sporting development,
- physical and sporting activities,
- high competition,
- Centre National d'Education Physique et sportive (CNEPS), and
- general administration, procurement and equipment services.

Figure 31 provides an overview of the Senegalese sport system.

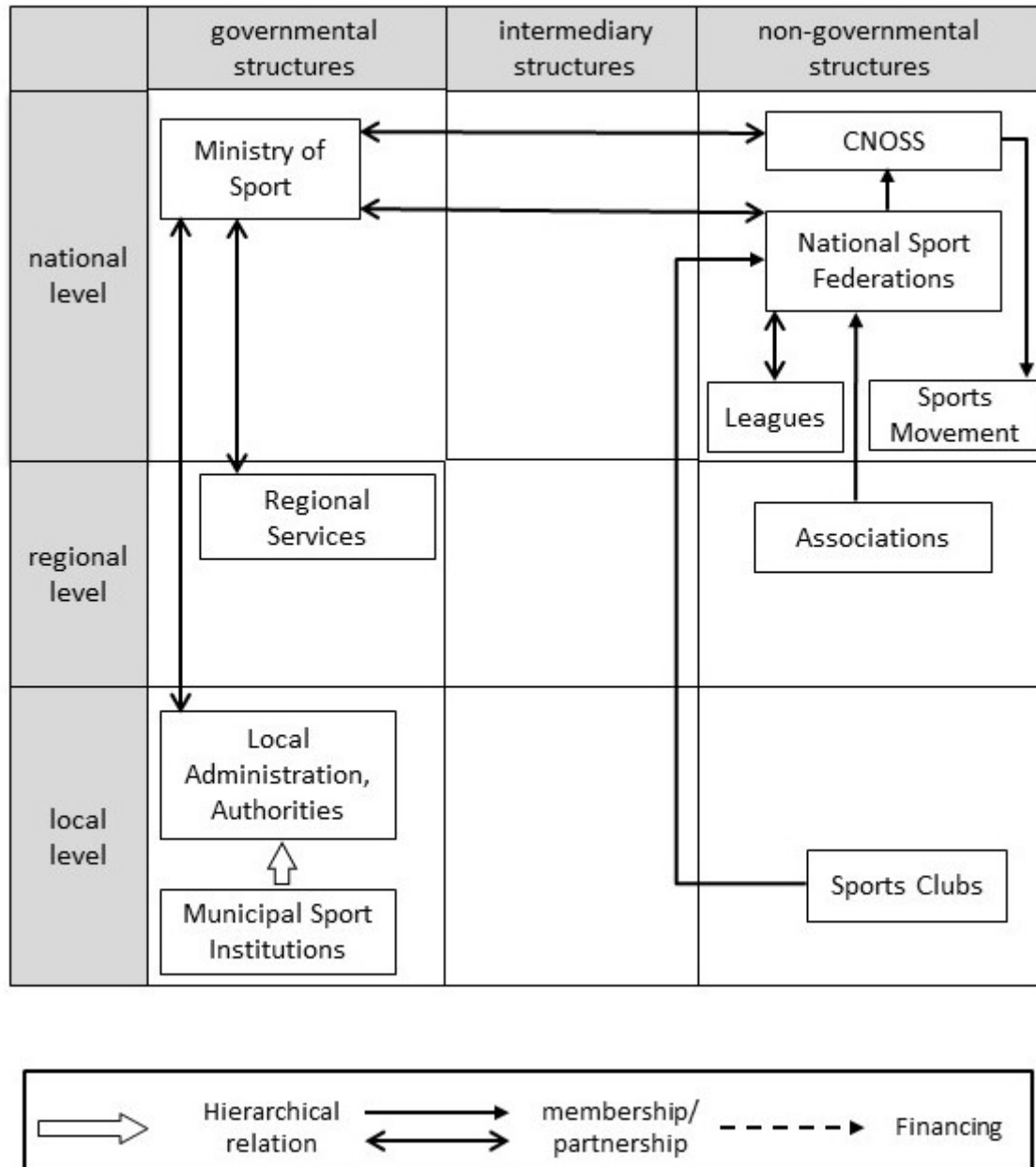


Figure 31. Structure of the national sport system of Senegal

### 5.8.1.2 Financing of sport

The state is the first sponsor of sport in the country. It bears the responsibility of financing the implementation of the policy of sport on a national level. Moreover, it is responsible for operations (administration) and investments in the sport sector. From 2002 to 2018, operations and investments expenses reached approximately 3.96 et 3.13 billion FCFA. The analysis (Sakho et al., 2019) of the investments showed a growth that can be described in three steps:

- From 2002 to 2009, investments kept growing until 2009 except in 2003 and 2006.
- From 2010 to 2014, following a decrease in investments in 2009 compared to 2008, they grew again until 2014.

- From 2015 to 2018, the considerable decrease in investments in 2015 was followed by another strong growth until 2018.

Alongside public financial investments in sport, the country has also seen many private individual investors in the sport industry, particularly in football. Those can be distributed in three categories: partners, sponsors, and individuals.

Partners and sponsors have realised the power of sport and the potential of fan engagement and activation through sport. This is why many firms have invested in sport in the last few years, given the performances of the Senegalese national basketball and football teams. Other types of sport benefit from private investment (e.g., judo, taekwondo, athletics, roller-skating). However, they have not been as important as basketball and football.

It is interesting to look at individuals closely because their investment has been growing in the last 20 years due to the growth of football academies and sports associations created by former international sportsmen and women. Indeed, many former players have decided to give back to the community by running activities for young people or seniors. Those activities have sometimes led to preparing future athletes who will nurture a desire to become professionals in the sport they have learnt to practise, love, and perform. For example, former elite athletes in athletics and volleyball offer these programmes. These former elite athletes are known nationally and internationally. They can secure funds and grants to help grow their programmes and even build a business.

Another specific example can be seen in football academies. Senegal is well known for three football academies thanks to the players transferred to Europe or elsewhere. Therefore, the reputation of the football academies is excellent. The three well-known football academies are Académie Génération Foot, Diambars FC, and Dakar Sacré Coeur. Players such as Sadio Mané, Ismaela Sarr, Pape Matar Sarr, Habib Diallo, and Bamba Dieng, have made it easier for football academies to be known around the world thanks to their performances in their clubs and recent trophies during the African Cup of Nations. Senegal won it for the first time in Cameroun in 2022. These successes can be related to the football academies that were inaugurated in the early 2000s. With their own means, the founding presidents decided to launch football academies that would recruit talented players, train them, and prepare them for future transfers to Europe, Arabic countries, or Africa. The academies' system also insists on offering an education and a good training programme within a good accommodation plan and high quality sports facilities living up to international standards. Those private individual investors received no grants from the state or very few in the past years. This topic is still being advocated to help grassroots football grow both for women and men.

On another note, the support of international sport governing bodies transits through federations, member associations and should reach the local actors. However, reality has shown that operations expenses sometimes tend to consume the budget, leaving very little money to support activities or other actors.

Considering commercial revenues and membership fees, it is very difficult to leverage these funds because very few clubs manage to get regular membership fees from their members. The structure and the governance of clubs has not been managed properly enough to encourage people to pay their fees. In terms of commercial revenues, the business plan for some institutions is still very poor and makes it difficult to get any revenues from matchdays, counting only on attendance. Sport is a show, but that aspect has not been developed enough in the country, except for football. Sponsors



are the only ones who allow clubs to earn revenues. However, contracts are not negotiated well and sponsors often get a better deal than the other party. In that sense, clubs need better human resources, good governance, and capacity building to become more professional and earn more money to grow their business.

Last, but not least, some events and tournaments help finance sport with the prize money and the investments made by organisers, sponsors, and participants. The organisation is usually left to federations or leagues. Yet again, the problem of reinvesting the revenues earned from events is still a debate.

In terms of the financing of sport, the Ministry faces two particular issues: weakness of financial capacities and quality of finance management. Since 2000, public resources allocated to sport development have grown significantly. Despite these efforts, the budget allocation to the Ministry did not reach 1% of the national budget. It has been changing since 2012 between 5 billion FCFA and 17 billion FCFA. The insufficiency of resources was aggravated by the fact that a huge amount of those resources, supposedly dedicated to investment, was spent in operations to cover expenses related to international competitions. Therefore, projects that have long been waiting (up to eight years) are still pending and struggling to start (e.g., re-construction of some stadia in the country, renovations, new constructions of stadia). Alongside these financial issues, issues related to financial and budget management quality have been noted. The Ministry of Finance regularly rejects applications for grants because documents are missing, procedures are not respected, mistakes are made, signatures are missing, and staff in charge does not know or respect procedures, methodology, deadlines, or rules.

### 5.8.1.3 Financing of sport facilities

Senegal has made efforts to provide good quality sport infrastructures. However, many problems still arise nowadays. These include weakness of financial resources necessary for investments, programming and budgeting issues, implementation of activities and governance/management of sporting infrastructures.

LPSDs 2016-2020<sup>28</sup> (Ministry of Economy, Planning and Cooperation, 2014), which is the reference in the country in terms of sport policy, had decided on four strategic points to be implemented. The sport infrastructures are among the top priorities<sup>29</sup>. Despite this serious commitment from the state, the situation of our sport infrastructures is very worrying. Indeed, the Senegalese sport system suffers from very few organised spaces dedicated to physical and sporting activities<sup>30</sup>. It has been said that nowadays, sport facilities are a true “living space”, where many activities happen. These activities go beyond sporting activities and include culture and economics, training, commercial aspects, accommodation, leisure and entertainment. Thus, sport facilities have become a place to practise sport and also grow commercial activities.

<sup>28</sup> “The LPSD is a document of strategic planning, orientation and declaration of intent of general scope, covering a period of medium to long term (five to ten years)” (Ministry of Economy, Planning and Cooperation, 2014, p.58)

<sup>29</sup> Notably through the strategic orientation n°1 which is described in these terms: construction, restoration of infrastructures and development of sports politics. By elevating the sports infrastructures to the level of a strategic priority the government thus gives substance to the intention of the legislator which considers sports infrastructures to be socio-educational facilities indispensable to societal life and positions itself as the base of sports policies (Ministry of Economy, Planning and Cooperation, 2014).

<sup>30</sup> The diagnostics were made in 2006, 2010, 2012 and 2015 as part of the evaluation of the different sectoral sport development policies initiated by the Ministry of Sports.

#### 5.8.1.4 Sport policy

**Charter of sport (*Charte du sport*).** The Document defining the Charter of sport expresses seven main principles (Government of Senegal, 1984). Among those, five principles depend on implementing sporting infrastructures: democracy, pluridisciplinarity, decentralisation, amateurism and protection of participants. The state and the local authorities are the main stakeholders responsible for allocating the necessary means to develop policies that allow each Senegalese citizen to have opportunities to practise a sport of their choice when their desire and personal abilities allow it. Since the recent political reforms, the institutions' existing political and administrative structure should organise grassroots sports in the country to allow easy access for the people. Indeed, when sports facilities are easily accessible to the people for free, there can be a guarantee of promoting amateurism in sport.

**Stakeholders.** The structure of the policy of sport in Senegal lies on two principles:

- 1) The state gives part of its prerogatives to some associations or institutions for the management and development of sport,
- 2) Decentralisation of management and development of sport.

According to this strategy, three categories of stakeholders, on different levels, participate in establishing and implementing the policy of sport infrastructures:

- The state itself (through the Ministry of Sport)
- Local authorities
- Private stakeholders

Having multiple types of actors, public and private, allows for an inclusive and participatory aspect which should guarantee efficiency in implementing the policy of infrastructures. That way, all stakeholders are involved in the national sport policy the Ministry of Sport conducts. The policy for sport infrastructures is detailed in the LPSDs (Ministry of Economy, Planning and Cooperation, 2014), like all other components of the national strategy for the development of sport. According to the LSPDs, the policy's goal for sport infrastructures in Senegal is to develop sport infrastructures with access that meet quality and security standards (Ministry of Sport, 2015). To achieve this main goal, there are three sub-goals:

- Build, rehabilitate and raise sport infrastructures to international standards,
- Secure maintenance of sport infrastructures,
- Improve the quality of sport opportunities in Senegal to support tourism and other related activities/domains.

**Completed sport infrastructure projects.** In terms of results, during the decade 1973-1983, the state built various sport infrastructures in the capital city, Dakar, and one multisport stadium in each city of the main regions. In 1993, the benefits of having hosted the African Cup of Nations "Senegal 92" and the financial support of the Agency for the Execution of Civil Engineering (AGETIP) allowed the construction of stadia in the cities of Mbour, Tambacounda, Kolda, and Saint Louis.

In 1998, the national company for telecommunication, SONATEL, was privatised, allowing the Ministry of Sport to receive an allocation of 800 million FCFA for the realisation of 80 multifunctional

complexes all over the country. Since 2000, the Ministry of Sport has set the construction and rehabilitation of sport infrastructures as one of the main priorities within the national policy for sport. This was based on the assumption that infrastructures were the basis of the development of sport practise and a fundamental element in improving athletes' and sportspersons' performances<sup>31</sup>. That led to the construction of the first Olympic Swimming pool in Dakar in 2002. The Chinese programme supported the state's efforts, which led to the construction of 11 regional stadia with international standards in four different stages, starting from 2007 and ending in 2011.

Local authorities have also contributed to the building effort by investing in the construction of some facilities. Some associations have invested by financing or building private training/capacity-building centres with modern sporting facilities and equipment. The policy of sport infrastructures in Senegal faces two main problems:

- Lack or insufficiency of financial resources for investments, combined with issues of programming and budgeting capacities and implementation of actions agreed,
- Inappropriate management of sporting infrastructures.

Even though the government has made serious efforts to provide appropriate sport infrastructures, many issues still arise. These issues include facilities not meeting the standards, lack of maintenance, mismanagement, and weak participation of the private sector in the investments.

#### 5.8.1.5 Elite sport

Even though they are not yet organised as professional disciplines or under a professional league (at least not all), some top sports can be cited in Senegal. The example of traditional wrestling is one of them. It has grown significantly over the last two decades with the rise of different private individual investors organising fights with many spectators. Senegalese have a passion for wrestling, and they watch either in the stadium or on TV. The Chinese programme built the national wrestling arena a few years ago. However, the fights used to take place in another old stadium (which caused the death of numerous fans on a fight day three years ago, leading to the stadium's closing for reconstruction). Some sponsors have been involved in the business of wrestling. However, it still needs to be organised since it does not have a federation. It is organised by the Comité National de Gestion de la Lutte. Football and basketball are the top sports, with also more or less regular seasons every year with the leagues organising the calendars and the competitions.

#### 5.8.1.6 Grassroots sport

**Youth.** With different programmes being developed to prepare for the Youth Olympic Games in 2026 in Dakar, youth has become a very important target lately. Besides, many stakeholders on a national and international level realised the importance of starting youth sport programmes from the grassroots. This allows the growth of athletes and promotes sport practises for better health and balance. The Ministry of Sport and Ministry of Education used to have a programme named UASSU<sup>32</sup>, that organised interschool competitions all over the country in different sports. However, the programme has been on hold for the last two decades, and the authorities are considering bringing it back on track.

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<sup>31</sup> Amadou Moctar Diouck

<sup>32</sup> Union des Associations Sportives Scolaires et Universitaires

**Women and girls.** The population of women and girls involved in the practise and/or the management of sport has grown tremendously. Indeed, through various programmes and advocacy, that particular target has been sensitised in the benefits of the practise of sport as amateurs and professionals. Even though it is easier to practise as an amateur, very few women and girls try their way into professional sport. This is because they may face difficulties such as family biases, lack of good facilities, teams to play with, or coaches to guide them. With the help of international sport governing bodies, more programmes are developed to encourage the professionalisation of sport for women and girls, especially in football and basketball. Former international athletes sometimes support individual sport athletes to find a way into the professional business of their discipline. These athletes have to move abroad to make it because the structure in Senegal does not allow them to perform or make a living out of their practise of sport.

**Diversity.** Facilities for people with disabilities are not very developed in Senegal. This violates the Declaration of Human rights and the Charter of sport since it does not allow that category of the population to practise sport. Some athletes (blind, deaf) participate in international competitions under the national team banner. However, they get very little support from the state. More programmes and facilities should be developed for them.

**Private fitness centres.** There has been rapid growth and development of private fitness centres in the country in the last 10 years. Private individual investments allowed people to establish these facilities in the heart of the local communities, offering thousands of people opportunities to get memberships and train as they wish. The easy access and the flexible training hours have made it easy for people to use the facilities at any time of the day and night, with sometimes optional personal coaches. This is a growing business in the country with many other opportunities if it is organised well enough.

#### 5.8.1.7 Education, human resources, and training

Senegal is a country of sport, with a lot of passion for sport. However, few people pursue a career in sport management, sport administration, or sport operations. Most of those involved in the sport industry are retired athletes. Most of the staff within sport operations are coaches, physical preparation coaches, or physicians. Among those working in sport administration, very few had a vocational training to administrate sport associations, and clubs. The government established public institutions for the training and capacity building for staff training athletes and/or students at school. Nowadays, given the growth and the fame of sport in the world and in Senegal, numerous people wish to be educated in how to work in the various jobs in sport with the right skills. Therefore, the number of private schools increased. They offer specific classes and diplomas for sport-related jobs<sup>33</sup>. Even though the school fees might not be too expensive, not everyone can afford these fees. Access is also limited to the capital city in Dakar. Thus, the other main cities in the country do not have these options for sport management training.

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<sup>33</sup> For instance, the Institut de Formation aux métiers du sport (IFM Sport) is a private school. The Bordeaux Management School (BEM Dakar) has introduced a new master's in sport management. The Institut Supérieur de Management (ISM) has launched an MBA in Sport Management.

Now that the country's reputation for loving and practising sport is growing, jobs in sport are also becoming easier to find. This is related to many associations, NGO's, sport governing bodies (federations, leagues) as they gradually hire skilled people to administrate sport with professional standards.

### 5.8.2 Country profile

The Republic of Senegal is a West African country. With its 17 million inhabitants, Senegal produces an annual GDP of approximately 27.6 billion USD. Consequently, the GDP per capita is 1,606 USD. The economy of Senegal is driven by mining, construction, tourism and agriculture. In 2019, 30.1% of the Senegal workforce was employed in the agricultural sector. Hence, they were involved in agriculture, hunting, forestry, and fishing (The World Bank, 2022b). The Gini-Index of 29.6 indicates a medium distribution of income in Senegal. Educational attainment in 2017 was estimated to be 21.92%. The share of youth not in education, employment or training was 32.71% in 2019. Figure 32 indicates the relevance of sport to Senegal's economy.

## Info sheet on the economic importance of the sport sector and the employment situation

### SENEGAL

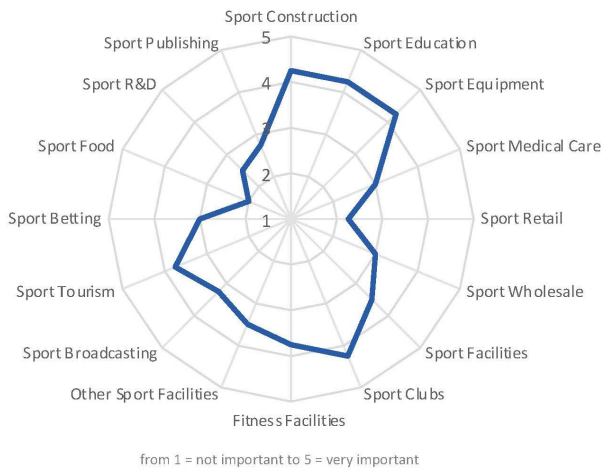


Figure C1-1. Importance of the sport sub-sectors for the economy

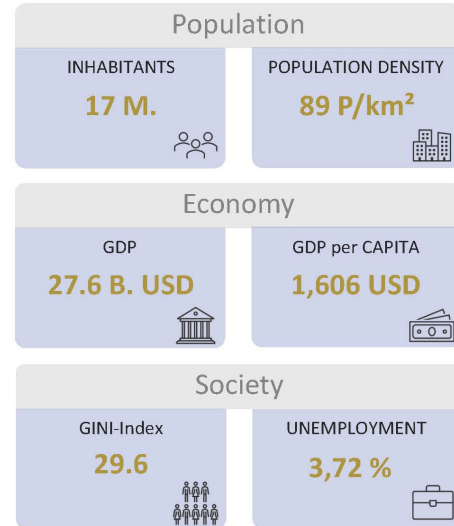


Figure C1-2. Country information

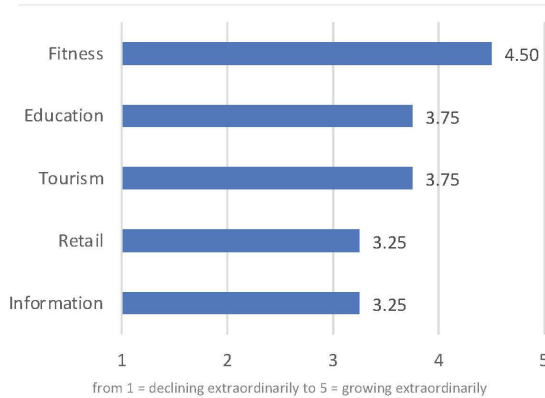


Figure C1-3. Growth potential of the sport sub-sectors

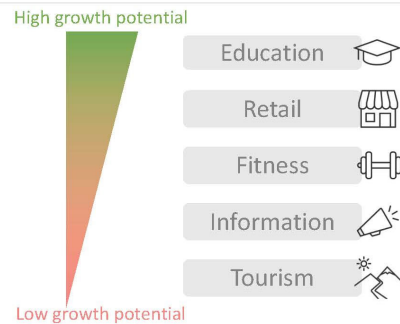


Figure C1-4. Ranked growth potential of sport sub-sectors



Figure C1-5. Ø number of qualified applicants per job opening



Figure C1-6. Difficulty to find qualified employees



Figure C1-7. Importance of the sport sector as an employer

n = 4; Average years of professional involvement in the sport sector (M = 13.0 years)

Figure 32. Economic importance of and employment situation in the sport sector of Senegal

The experts described investments from private investors into sports clubs and fitness centres. Moreover, recent sporting success has increased the willingness to allocate funds toward sports. With the Youth Olympic Games taking place in Senegal in 2026, there is strong interest in sports as a (socio-economic) development factor from the national bodies and international donors/development agencies. Moreover, an increasing number of Senegalese have become interested in sport (especially women and the youth. Hence, private investors are aiming to capitalise on this growth

through investments. Overall, preparing for the Youth Olympic Games in 2026 created a development boost for sporting infrastructure, such as stadia or swimming pools.

However, the experts described various challenges in developing sport in Senegal. The funding of sports remains a challenge, according to the experts. More specifically, the financial means to invest in the construction or maintenance of infrastructure are limited. The lack of financial resources is amplified in all sports that are not male football. Beyond this, the legal and tax framework inhibits the development of the sport sector. For instance, slow official procedures and bureaucracy were mentioned. In addition, the experts described a lack of organisational capacity driven by a lack of qualified individuals. High-ranking officials lack experience and professional training in the sport sector. The lack of government funding and skilled employees presents a significant challenge across all five sub-sectors of sport. In addition, the sport tourism sub-sector is confronted with the poor condition of the existing infrastructure, while the fitness sub-sector is seeking private investments. The sport education sub-sector has to deal with the poor condition of sporting infrastructure. In terms of employment, P.E. teachers and fitness trainers are hired frequently. One expert noted that former practitioners are frequently redeployed as trainers or sports managers without proper training or qualification.

The experts reported that over the last five years, a few different sporting events attracted large crowds (more than 10,000) of spectators. These events were predominantly football matches, basketball games, or wrestling events. The Youth Olympic Games in Dakar are expected to attract much attention. Moreover, the Basketball Africa League matches are expected to fascinate the Senegalese. Figure 33 gives an overview of selected sport events in Senegal.

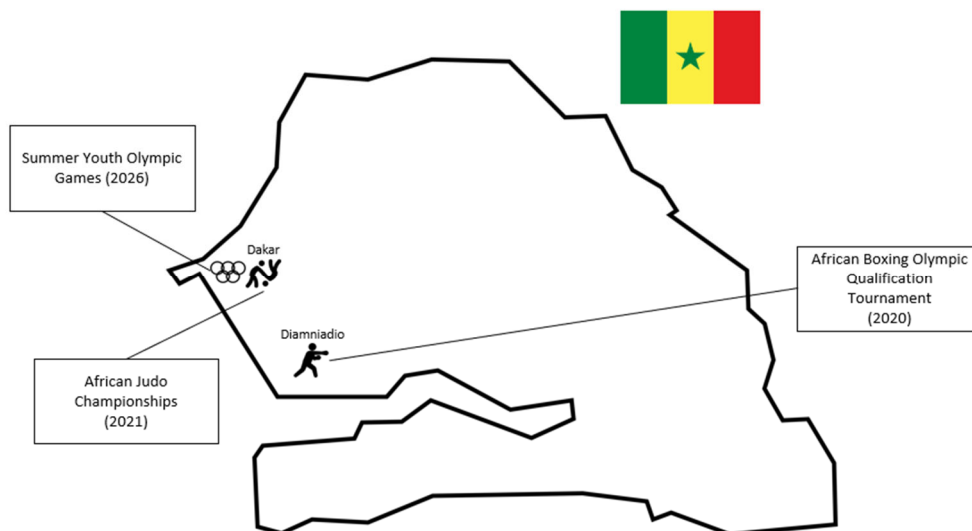


Figure 33. Past and upcoming large-scale sporting events in Senegal

### 5.8.3 Social and cultural relevance of sport

The four interviewees from the voluntary and public sector described sport as a significant part of Senegalese culture. As the current men's African champions in football and the next host of the Summer Youth Olympic Games in 2026, sport is part of national identity and people's daily lives. While sport was not given much importance a few decades ago, successful athletes like the football

player Sadio Mané are nowadays national icons and role models for the youth. The most popular participation sports are football, basketball, handball, traditional wrestling (lutte traditionnelle), and athletics. Fitness has also become increasingly popular. Prevalent spectator sports are traditional wrestling, football, boat racing (course de pirogue), and horse riding (course hippique).

Sport is part of the school curriculum in Senegal, and children participate every week. Organisations like the “Union des Associations Sportives, Scolaires et Universitaires” (UASSU) used to be highly involved in organising regular competitions at the school and university level. However, this has been declining in recent years. Still, participation in sport is high among young people, with female participation often lower than male participation, especially when girls drop out of school. Females participate in team sports such as football, volleyball, and basketball, as well as individual sports like athletics, taekwondo, boxing, and wrestling.

As part of the “Emerging Senegal Plan” (Plan Sénégal Emergent [PSE]), the national government has committed to strengthening the economic and social dimensions of sport with more investments and support at different levels. Overall, sport is becoming increasingly relevant in Senegal – socially, culturally, economically, and politically.

*“[...]today we are on a historical trajectory. It’s true that from the very beginnings of our country, sport has been a unifying element. There have been stalemates sometimes for twenty years, and constraints...a refusal to practise sport, and for some years sport has been repositioning itself so that it has a social and economic element in our country. Sometimes there are politics too which have an effect, big things to come such as the Youth Olympic Games for example.”<sup>34</sup> (SEN2VOL)*

#### 5.8.4 Economic potential and trends in the sport sector

The Senegalese sport structure has been largely amateur, partly due to laws and decrees from the 1960s, 1970s and 1980s. For instance, the “le charte du sport” from 1964, has enshrined amateurism into the Senegalese sport landscape. Some interviewees pointed out the urgent need to reform this outdated legislation to allow the economic potential of the sport sector to unfold. There are ongoing discussions among the main stakeholders to define a new legal framework for sport in the country.

For the reasons mentioned above, public and non-profit institutions dominate the Senegalese sport sector, with private enterprises less prevalent. From the government side, sport is a national priority and is mentioned in the “Emerging Senegal Plan”. As part of this plan, the national government intends to strengthen the economic dimension of sport by improving its contribution to the creation of wealth and employment, supporting the professionalisation of sports associations and groups, promoting recreational sports, improving the quality of the offer for the organisation of international meetings, and promoting sports and related professions. Moreover, by hosting the Youth

<sup>34</sup> “[...]aujourd’hui on fait une trajectoire historique. Le sport, c’est vrai qu’au départ de notre pays très tôt, il était un élément fédérateur. Il y a eu des impasses des fois une vingtaine d’années ou les contraintes...un refus à la pratique sportive et depuis quelques années le sport est en train de se repositionner pour qu’il a un élément social et économique dans notre pays. Et il y a à la fois la politique aussi qui a un effet, des grandes choses à venir comme par exemple les Jeux Olympiques de la Jeunesse.”



Olympics Games, the government is planning on using the event as a catalyst for strategic development in the country. The successful implementation of the Dakar 2026 Youth Olympic Games is the priority for the Ministry of Sport and the National Olympic Committee.

The national sports leagues are economically weak, and even athletes of the most popular sports are not remunerated at the professional level. Moreover, the African Football Confederation CAF is considering introducing an African Super League. This should be similar to the basketball super league BAL mode. One interviewee mentioned this as a further threat to the local sport leagues. One of the challenges identified was that the sport event industry is not developed enough and does not generate sufficient profits.

*“Also, we don’t have enough organisations to make it attractive for investors, television channels, and people who want to make money. Our sports events are not attractive enough from that point of view. So it is very difficult for someone to live in Senegal and earn money from a sporting point of view.”<sup>35</sup> (SEN4PUB)*

However, some dynamic start-ups exist, especially around football, fitness, and traditional wrestling. Some young entrepreneurs have even taken sports broadcasting into their own hands and have started borderline legal YouTube channels. Fitness and bodybuilding were also mentioned as areas with potential, especially for private businesses. Another promising area was identified as athlete representation. With Senegal being the third-biggest exporter of footballing talents in the world, athletes need representation through agents supporting them in the process of moving to other countries. The export of talents, however, was also acknowledged as an inhibiting factor for the local leagues and sport structures.

One interviewee suggested that local organisers consider closed league approaches, as opposed to the current open league approach, to ensure a more stable income for clubs. Another interviewee pointed toward reinvigorating the school and university leagues. Overall, the improvement of event organisation was seen as crucial. Two interviewees mentioned sport tourism as an area with potential. This relates to Senegal already having zones of interest along the coast and inland and existing tourism infrastructure. The interviewee also pointed toward the Youth Olympic Games as a potential catalyst for sport tourism.

### 5.8.5 Education and employment

There are universities with faculties offering physical education, sport management and other sport-related degrees. There is the “Institut National Supérieur de l’Éducation Populaire et du Sport” (INSEPS) at the Université Sheikh Anta Diop, which is a collaboration with the French INSEPS and offers sport education, sport science, as well as sport management and administration. They also offer an executive Master’s programme in sport management in collaboration with the Swiss “Centre Internationale d’Études du Sport” (CIES). Moreover, there is the private “Institut de Formation aux Métiers des Sports” (IFM), which offers degrees in sports law, management, education and more.

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<sup>35</sup> „Ensuite, on n’a pas suffisamment d’organisations qui puissent permettre de rendre attractif pour les investisseurs, pour les chaînes de télévision, pour des gens qui veulent gagner de l’argent. Notre spectacle sportif, il n’est pas suffisamment attractif de ce point de vue-là, donc c’est très difficile pour quelqu’un de vivre au Sénégal et de gagner de l’argent du point de vue sportif.”

Currently, there are no programmes for former elite athletes to transfer their experiences into the sport sector after the end of their active careers. Since they often do not have a university degree or even a high-school diploma, they struggle with unemployment after their sporting career. One interviewee pointed out the huge potential to effectively transfer these athletes' knowledge into the sector. However, access to these programmes is not affordable for everyone. At present, many young managers end up without employment.

In terms of employment opportunities, there has been a recent study with the European Union to identify the sport jobs that could be created through hosting the Youth Olympic Games. The findings pointed toward more than 200 potential jobs, including facility management, equipment, logistics, event technology, administration, et cetera. Overall, there is acute awareness that the sport sector can offer more opportunities than physical education or coaching. However, it was not entirely clear how this potential could be implemented over the next years.

*“Because the problem we have here is our sports competitions lack traction, and you know, it takes professionals to organise events that attract crowds and so on. So that, we need to be reinforced. Then, in the business of sport, how to make money through sport, it is necessary to strengthen the skills of sports managers in this area.”<sup>36</sup> (SEN1VOL)*

The biggest lack of competencies lies in the commercialisation of sport events. Venue management, marketing and broadcasting were all areas that were identified as areas for improvement. There could be opportunities to address these areas through the Youth Olympics Games.

#### 5.8.6 Competencies for the sport sector

Combining the right knowledge attributes, skills, abilities, and other competencies can increase individual success when applying for a job. Ten job ads were analysed to identify which competencies can improve the individual chances of getting a job in Senegal's sport sector (see Figure 34).

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<sup>36</sup> „Parce que le problème qu'on a ici c'est que nos compétitions sportives manquent de traction, et vous savez, il faut des professionnels pour organiser des marches qui attirent du public etc. Donc ça, on a besoin d'être renforcée. Ensuite, dans le business du sport, comment faire pour gagner de l'argent à travers le sport, il faut renforcer les compétences des managers sportives dans ce domaine-là.“

## Central competencies for sport sector jobs in SENEGAL

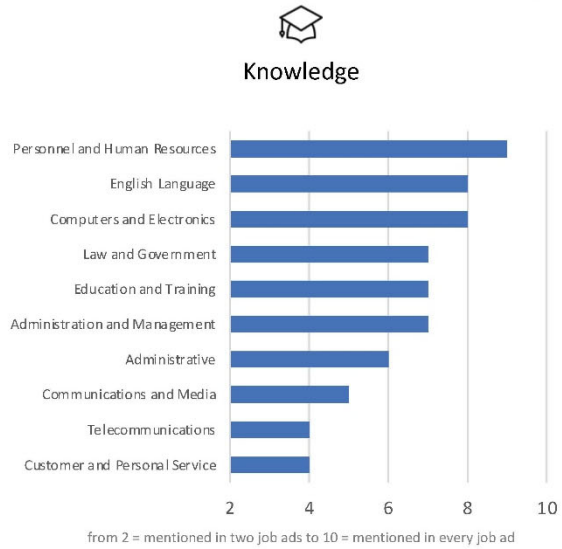


Figure P1-1. Frequency of knowledge attributes in sport sector job offers

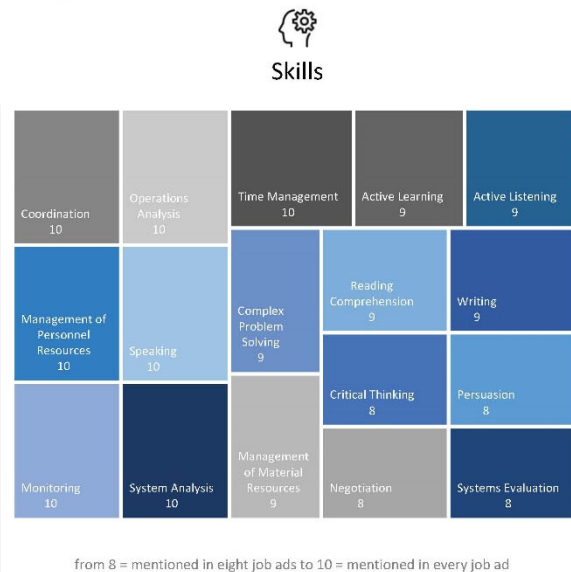


Figure P1-2. Frequency of skill attributes in sport sector job offers

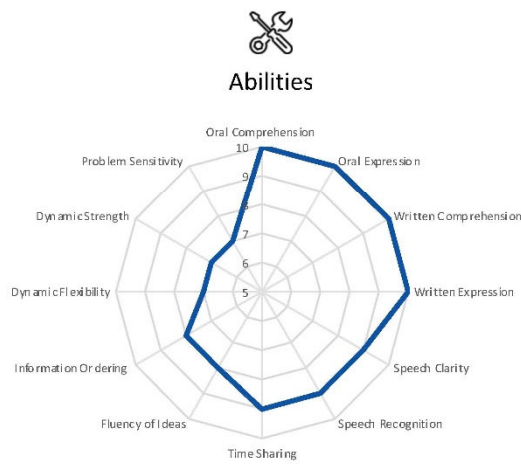


Figure P1-3. Frequency of ability attributes in sport sector job offers



Figure P1-4. Representation of other competencies in sport sector job offers

Ten current (2<sup>nd</sup> quarter 2022) job offers were analysed to assess the required competencies in the national sport sector. The frequencies result from matching the job offers with a set of defined competencies. Job titles of the analysed job offers: Media Distribution Management- BAL; Broadcast Production Management- BAL Security; Lead- Basket Ball Africa League; Ticketing and CRM Lead- BAL; Basket Ball Operations Assistant- BAL; Basket Ball Africa League Events Project Management; Basket Ball Africa League Facilities and Venues Management; Play international- coordinateur.rice pour son projet d'accompagnement d'académies sportives en Afrique de l'Ouest; Play international- Coordinnatrice des programmes au Sénégal; Play International - coordinateur pédagogique

Figure 34. Central competencies for sport sector jobs in Senegal

The evaluation of the job postings indicated that the knowledge attribute of 'Personnel and Human Resources' is critical. Nine of ten job ads indicated that applicants require knowledge of principles and procedures for personnel recruitment, selection, training, compensation and benefits, labour relations and negotiation, and personnel information systems. Beyond this, individuals ought to obtain knowledge of the English language. In other words, applicants benefitted from knowing the structure and content of the English language, including the meaning and spelling of words, rules

of composition, and grammar. In addition, being familiar with computers and electronics seemed vital when applying for a sport sector job in Senegal.

The analysis indicated a range of skills that seem vital for a successful application for a sport sector job. Seven skill attributes were mentioned in all job postings. These were system analysis, monitoring, speaking, management of personnel resources, time management, operations analysis, and coordination. Hence, individuals could benefit from the capability of managing one's own time and the time of others, talking to others to convey information effectively and determining how a system should work and how changes in conditions, operations, and the environment will affect outcomes. Overall the analysis yielded a whole range of skill attributes essential for applicants.

Furthermore, four abilities were mentioned in all analysed job ads. These were oral comprehension, oral expression, written comprehension, and written expression. Hence, communication appeared to be a vital ability of sport sector jobs. More specifically, communication is the ability to listen and understand information and ideas presented through spoken words as well as speaking so others will understand. In addition, applicants must be able to read and understand information and ideas presented in writing and communicate information and ideas in writing so others will understand.

Finally, a range of other competencies has been identified that aid the chances of success when applying for sport sector jobs in Senegal. These included, among others, independence, attention to detail, integrity, and stress tolerance. Hence, candidates should develop their own way of doing things, guideline themselves with little or no supervision, and depend on themselves to get things done. Moreover, individuals should be careful about details and thorough in completing tasks. Finally, honesty and ethical behaviour and accepting criticism and dealing calmly and effectively with high-stress situations were required by employers in Senegal.

## 5.9 Serbia

### 5.9.1 National sport system of Serbia (Author: Tarik Ajanovic)

#### 5.9.1.1 Political and economic background

Located at the heart of the Balkan peninsula in Southeast Europe, the Republic of Serbia is a landlocked developing country (International Monetary Fund, 2022). It went through major political and legal transformations over the last century. Serbia remains a highly traditional country known for being one of the most populated and influential parts of SFR Yugoslavia. It is still recovering from a decade of international sanctions (United Nations Security Council, 1992) placed upon it during the 1990s for its role in the Bosnia and Herzegovina, Croatia, and Kosovo wars. Following the formal dissolution of SFR Yugoslavia in 1992, Serbia continued its existence within FR Yugoslavia/Serbia & Montenegro<sup>37</sup> until 2006. Afterwards, it continued as a sole state following the proclamation of independence by Montenegro. In 2008, the former SFR Yugoslavian autonomous region of Kosovo declared its independence from Serbia. The government in Belgrade still disputes this matter without any de facto control over it.

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<sup>37</sup> Between 1992 and 2003, the former SFR Yugoslavian republics of Serbia and Montenegro continued to exist as the newly-founded state of FR Yugoslavia. Following constitutional changes in 2003, the country was transformed to a political union between Serbia and Montenegro, thus changing its name once again.

Today, Serbia is a highly-centralised parliamentary republic with governance structures consisting of municipalities and cities still recovering from a long period of post-transition under international sanctions. Like most of its neighbouring countries, Serbia remains in the formal process of eventually joining the European Union. Serbia is a member of major sport-related organisations such as the United Nations and the IOC.

The Transparency International's CPI index, reveals that Serbia ranks 96th on the list of 180 countries and territories, which is indicative of corruption practises (Transparency International, 2022b). From a demographic perspective and according to the 2011 census, Serbia has a population of 7.1 million (Statistical Office of the Republic of Serbia, 2022). Serbia is a relatively homogenous country with 72% Serbs. The remainder comprises various ethnic minorities including, but not limited to, Albanians, Bosniaks, Croats, Hungarians, and Roma. Compared to its neighbours, whose residents' languages are mutually understandable, some of these minorities speak non-Slavic languages, such as Albanian or Hungarian, alongside Serbian.

The Serbian diaspora, estimated to number between two and three million people of Serb origins (but not necessarily from Serbia), has a long-established history in the United States, Germany, Austria, Switzerland, Australia, and Canada. These migrations relate to migrations throughout the 20th century, with a sharp increase following the dissolution of SFR Yugoslavia in the 1990s.

With a GDP per capita of USD 9,215 (The World Bank, 2022b) and annual GDP growth of 7.4% (The World Bank, 2022b), Serbia is one of Europe's least economically developed countries. It has an estimated rate of 30.4% of youth unemployment (The World Bank, 2022b)

#### **5.9.1.2 Sport system and structure of organised sport**

Figure 35 provides an overview of Serbia's sport system.

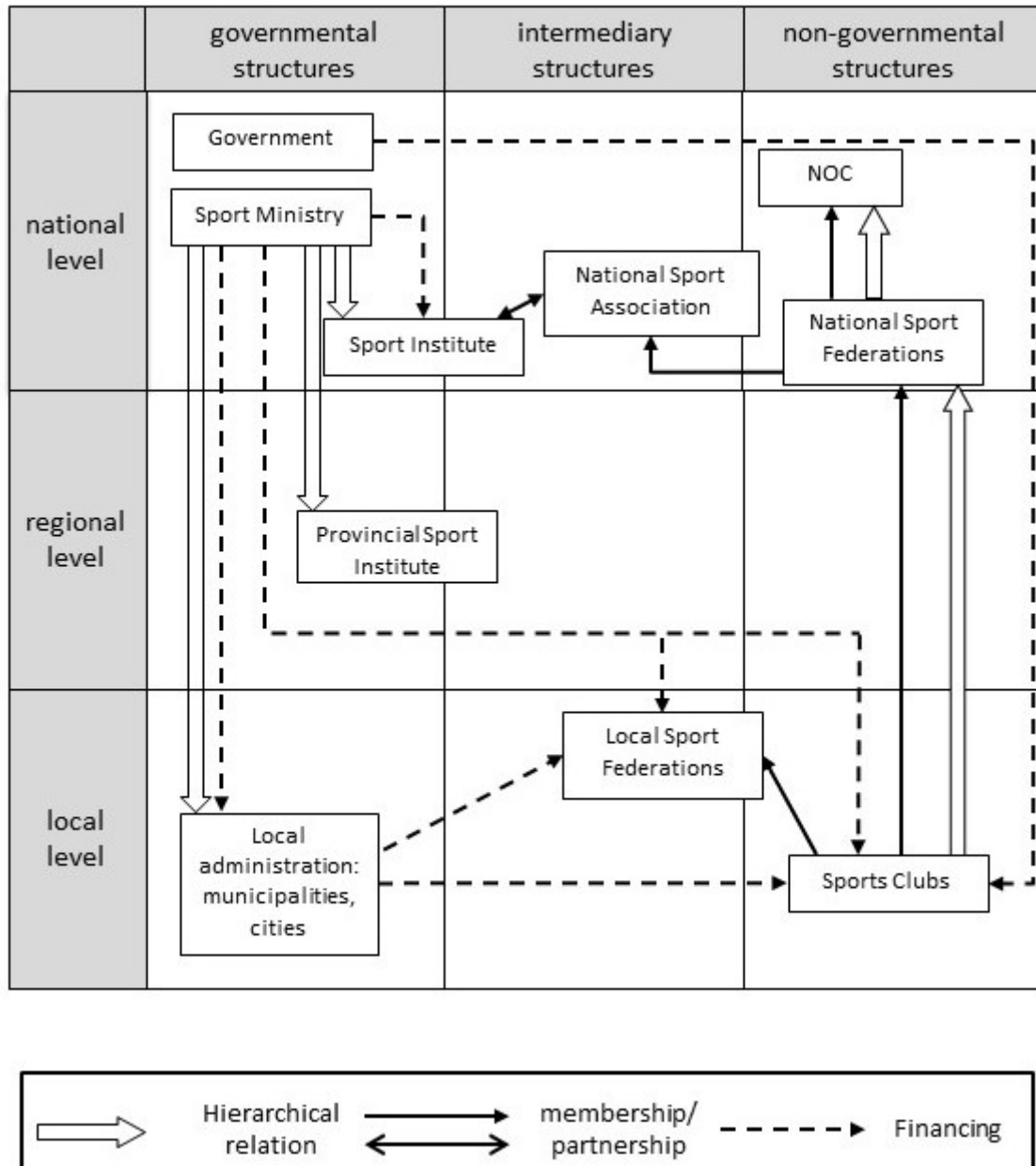


Figure 35. Structure of the national sport system of Serbia

#### 5.9.1.2.1 History of sport

Serbia is recognised as the regional power in many sport disciplines and is well-known for producing world-class athletes on all professional levels. Although most of the sporting successes result from major state investments during the 20th century, that is SFR Yugoslavia, Serbia has maintained a high-performance level in most major sports, building a recognisable brand for itself. However, domestically, sport is still lagging in investment and structural efficiency from most other European countries of similar size.

The first records of organised sport activity on the territory of modern Serbia are from 1839 and 1843 with the establishment of private fencing schools in Kragujevac and Belgrade, respectively. This was followed by swimming and gymnastic schools in 1857 and rowing in 1872 (Simonović, 2016). After regaining its independence from the Ottoman Empire in the mid-19th century, other

sporting trends in Europe did not circumvent the young state. As with many other European Slavic nations, the ideas of the German Turner movement reached Serbia as early as 1882 with the creation of the first gymnastics club. They were gradually replaced with the Slavic Sokol movement (Belgrade Sokol Association, 2022). With the renewal and expansion of the Olympic movement, the Olympic Committee of Serbia ('NOC') was founded in 1910 and joined the IOC two years later (IOC, 2022b). The new state initially focused on military tradition and physical well-being (Simonović, 2016). Thus, Serbian military officers initiated and developed many sports activities (Paripović, 2014). This is also related to the formation of the NOC.

After World War I, where Serbia suffered major demographic casualties between 26.3% and 42.4% of its total population (Radivojević & Penev, 2014), the interwar period had been a time of recovery where club sport played an important role. For instance, some sports clubs still exist today and new sports such as basketball were introduced during that period. Moreover, Serbia became a part of the Kingdom of Yugoslavia<sup>38</sup>. Further, the NOC continued through the relevant National Olympic Committees of the Kingdom of Serbs, Croats and Slovenes/Kingdom of Yugoslavia ('YNOC') and, later the SFR Yugoslavia and FR Yugoslavia/Serbia & Montenegro until its return in 2006 (Olimpijski komitet Srbije, n.d.). YNOC had led the Serbian sports policy at the time with its headquarters in Zagreb, Croatia, between 1919 and 1927.

After the Second World War, the most important wave of sports development occurred with major investments and rebuilding efforts by the Yugoslavian communist/socialist authorities. Pre-war clubs had been mostly disbanded. New sports clubs, such as Belgrade multi-sport clubs Red Star and Partizan, were established. During this time, the Yugoslav authorities introduced the celebration of Josip Broz Tito's '2<sup>nd</sup> birthday', who had been the leader of the new state at that time. The celebrations were coined through mass relay sporting events bringing in the youth from all over the country to celebrate the "Day of Youth", introduced in 1957. The last event was held eight years after Tito's death in 1988 (Stevanović, 2019). The mass sports event, the so-called slet, always culminated in Belgrade at the Yugoslav National Army stadium.

Although clubs from Serbia, and particularly from Belgrade, dominated the sports landscape of Yugoslavia, their biggest success came at the very end of its existence. In 1991, Red Star won the European and Intercontinental Cup in football.

In the wake of the dissolution of SFR Yugoslavia and the UN sanctions imposed on FR Yugoslavia, sporting activity in Serbia was severely limited, resulting in sports sanctions. For example, the NOC only returned to the Olympics and the Olympic family in 2008. Serbia often claims legal succession and heritage of all sporting results achieved between 1918 and 2006. However, as all predecessor states of Serbia have ceased to exist, this is not supported by most major international federations.

Today, Serbia is well-known for its sporting achievements and talented individuals representing their nation as well as the biggest sporting clubs in the world in various sports. Major international success was achieved in tennis, basketball, football, handball, water polo, and volleyball. However, as in most other countries of the region, the sporting infrastructure and the private sector are not very developed, resulting in major state aid to sports entities.

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<sup>38</sup> The state had been known as the Kingdom of Serbs, Croats and Slovenes between 1918 and 1929 and Kingdom of Yugoslavia between 1929 and 1941.

#### 5.9.1.2.2 *Organisation of sport*

**Legal framework.** Based on a state constitutional prerogative, the Sports Law of the Republic of Serbia ('Sports Law') was adopted in 2016 to regulate sport on a national level as an activity of key importance to the state. In contrast to similar laws in the region, it clearly defines how sports entities should be created, registered, and liquidated. This could be considered as *lex specialis* in relation to general legislation dealing with, for instance, establishing commercial entities. Due to the centralised nature of the Republic of Serbia, it also regulates various administrative procedures related to sport which are otherwise found in guidelines or regulations of lower political entities. During the creation of the Sports Law draft, the legislators tried to follow European standards in place at the time through comparative analysis and case studies, as for its sports law from 2010 (Government of Serbia, 2010). The secondary national objective of preventing and sanctioning sports doping infringements is regulated by the Law on Prevention of Doping in Sports ('Anti-doping Law'; Government of Serbia, 2021) as well as further *lex specialis* solutions such as for the prevention of violence in sporting venues.

**Strategy & Financing.** On a municipal, city and AR Vojvodina level. The relevant authorities are required to create their Programme for Sports Development ('Local Sports Programme') within one year from the approval of the National Sports Strategy, which is then submitted to the Sport Ministry as a prerequisite for the participation in national funding projects. The Sport Ministry directly finances the following activities on a national level, regardless of the National Sports Strategy or the related Local Sports Programmes (Serbian Ministry of Sport, 2022):

- May Award – highest sports achievement award in national sport
- organisation of School Olympic Games
- regional coordinators for the development of school sport
- participation of all university teams in international sports competitions
- recreational sport
- sport for persons with disabilities
- activities of associations of journalists, sports medicine, sportspersons in national representative teams and physical education teachers

In accordance with the above, the Serbian Institute of Sport and Sports Medicine ('Sport Institute') provides direct assistance through access to infrastructure, medical and developmental know-how and academic research and publication resources (TÜV SÜD Certification Body, 2019). The same is provided on the AR Vojvodina level through the Provincial Institute for Sport and Sports Medicine ('Provincial Sport Institute').

Another state institution that operates according to the Anti-Doping Law is the Anti-Doping Agency of Serbia. According to its annual reports, it conducts around 900 anti-doping checks yearly (Anti-Doping Agency of Serbia, 2021).

In the past, all sporting activities in SFR Yugoslavia had been financed through SOFK<sup>39</sup>. However, this practise ceased in 1992 when the organisation abandoned its socialist agenda and changed its name to Sports Association of Serbia ('National Sport Association'). Today, it exists as a non-governmental association supporting the work of all of its members, and other national federations

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<sup>39</sup> Abbreviation for Savez Organizacija Fizičke Kulture (Serbian: Federation of Organisations for Physical Culture).



(Serbian National Sport Association, n.d.). Yet, it does not directly finance sport which remains a national and local prerogative. Its role is mostly limited to project assistance.

According to the 2014-2018<sup>40</sup> National Sports Strategy, the sports activity in the Republic of Serbia is to be developed based on the following priorities (Government of Serbia, 2015):

- development of sports for children and youth, including school sport
- increasing citizens' participation in sports activities through the development and improvement of recreational activities
- development and improvement of elite sport
- development and improvement of sports infrastructure

The National Sports Strategy has identified the financing of sport as one of the biggest challenges. This relates to the underdeveloped economy on a national and local level as well as an extensive "black market" in the area of lotteries/games of chance. This limits the development of sport and its financing. According to the 2015 statistical report of the Sports Ministry, 0.43% of the Government's budget is used for the realisation of sports projects through the Sport Ministry in the amount of approximately 26 million EUR.

However, the government also provided state aid packages in the past 10 years to its two biggest football and basketball clubs, Red Star and Partizan. According to the Government's Minister of Finances, such direct and indirect state subsidies added up to more than 100 million EUR. It has to be noted that those clubs did not pay their tax debts of 25 million EUR combined to the state (N1 Beograd, 2022). It seems as if the the state authorities employ the two biggest clubs as a policy tool to their sporting successes as their own. Therefore, they create "quasi-state projects" in a segment not under the direct authority of the government. However, more than 300 other clubs have to share an annual budget of just 10 million EUR (N1 Beograd, 2022). Several former players have publicly stated that these professional clubs should not receive any state aid (Mondo, 2019). This is all part of a wider narrative that the two biggest football clubs should be privatised as they are operating, as many other clubs in the surrounding countries following the dissolution of SFR Yugoslavia, as non-profit associations (Parović, 2017).

On the other hand, the Government in 2016 established the policy of supporting elite sportspersons that achieve the highest results, such as winning an Olympic medal or a continental or world championship, in the form of a lifetime pension ('Sport Pension'). Such Sport Pensions are paid out monthly to achieving sportspersons in the amount of one to three average net salaries in the Republic of Serbia for the preceding year, depending on the achieved results according to pre-established criteria (Government of Serbia, 2016).

**Participation.** The Ministry of Youth and Sport is responsible for sport governance in the Republic of Serbia ('Sport Ministry'). In the context of the Sports Law, it prepares and facilitates the Strategy for Sports Development ('National Sports Strategy') and the related action plans, provides administrative services to sports entities and maintains the registry of sports entities in Serbia. The National Sports Strategy itself is formally adopted by the Government of Republic of Serbia ('Government').

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<sup>40</sup> NB: Publicly accessible resources, including the Sport Ministry's website, do not include a newer version, i.e. for the 2020-2030 period.

Further, Serbia formally recognises two autonomous regions – Vojvodina ('AR Vojvodina') and Kosovo & Metohija. For this report, Kosovo has not been considered as it proclaimed full independence in 2006. However, in the context of Vojvodina, the sports policy is facilitated by the AR Vojvodina Provincial Secretariat for Sports and Youth (AR Vojvodina Provincial Secretariat for Sports and Youth, n.d.). It operates in accordance with the National Sports Strategy. Also, it develops its own sports strategy and policy, dependent on the National Sports Strategy. The 2014-2018 National Sports Strategy identifies demographic depopulation and ageing as the main challenges which need to be overcome in the context of sport development. Thus, the Sport Ministry has placed this issue high on the list of main challenges. The 2015 statistical report of the Sport Ministry reveals an overview of sport participation (see Table 22).

Table 22. 2015 Sport Ministry's statistical research on sport in Serbia (Serbian Ministry of Sport, 2015)

Value	Number
Registered sportspersons	250,000
Elite sportspersons	3,960
Children participation in sports	233,069 (30%)
University student participation in sports	10,000 (4.5%)
Resident participation in sports	486,677 (10%)
Registered sport organisations	13,000
National sport federations	102
National sport federations for persons with disabilities	5
National sport federations for recreational sport	4
Sportspersons with national recognitions <sup>41</sup>	552
Sportspersons (amateur) with national scholarships	360

The 2009 research on volunteering in sports in the Republic of Serbia showed that only 17% of high school students and 24% of university students had been volunteers in sport (Komnenić et al., 2009). The report also revealed that low household income had been one of the important factors for low participation rates. Although 80% of interviewed clubs claimed that they engage volunteers, only 6% had a volunteering strategy, 15% had a volunteer database, and 31% had a volunteer coordinator. Concluding, volunteering in sport remains an ad hoc activity for most clubs.

**Identified issues and negative trends.** The most prominent trends in the sports system in the Republic of Serbia can be classified into the following categories:

- 1) underdeveloped and unmaintained sports infrastructure, especially outside of the larger cities
- 2) lack of substantial private investment into elite sport as clubs are organised as associations, coupled with a lack of operational and financial transparency on all levels
- 3) dependence on public state aid; who will get such support is a highly politicised issue and therefore heavily subject to corruption
- 4) violence in and around sports venues (Simonović et al., 2011) is often seen abroad when Serbian fans travel to support their teams (including the participation of Serbian diaspora residents abroad); this is further complicated by relationships of such groups with the Government (Komarčević, 2022) and a history of participating in as paramilitary groups (The Observer, 2004) or supporting (Bogdanović et al., 2021) acts related to genocide, war

<sup>41</sup> Not clear if this includes sport pensions.



crimes, and organised crime, i.e. some fan groups have historically been supporting individuals or groups that have been convicted for war crimes before the International Criminal Tribunal for the Former Yugoslavia.

Serbia is a country with a lot of international recognition in the context of sport. International elite sport success is considered a driving force for individual and team sport participation.

**Summary.** Some of the main aspects of the Serbian sports sector can be marked as follows:

- highly centralised key decision-making
- lack of transparency in the utilisation of public funds and corruption
- high levels of hate crimes and violence which permeate all levels of the Serbian society; and
- lack of organic growth in the sports sector, including, but not limited to, private investment into infrastructure.



### 5.9.2 Country profile

The Republic of Serbia is located in south-eastern and central Europe. The country generates a gross domestic product of 63.1 billion USD. With approximately 6.8 million inhabitants, this equates to a GDP per capita of 9,215 USD. The service sector primarily drives Serbia's economy. In 2019, 15.6% of the Serbian workforce was employed in the agricultural sector. Hence, they were involved in agriculture, hunting, forestry, and fishing (The World Bank, 2022b). The Gini-Index of 34.5 indicates a medium distribution of income in Serbia. The share of youth not in education, employment or training is roughly 16.05%. The educational attainment in 2019 was reported to be 98.53% (The World Bank, 2022b). Figure 36 indicates the economic relevance of sports in Serbia.

## Info sheet on the economic importance of the sport sector and the employment situation

### SERBIA

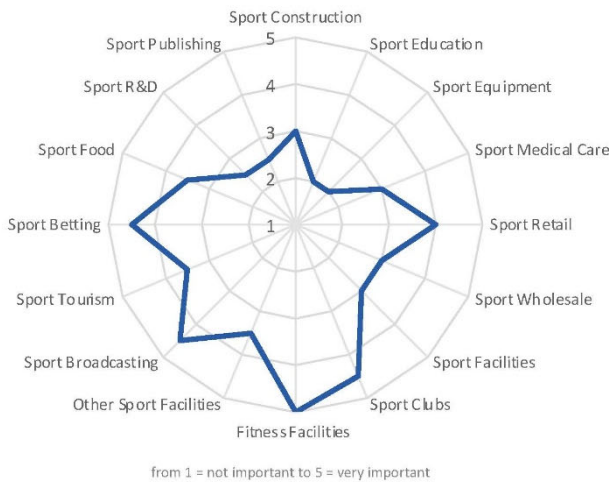


Figure C1-1. Importance of the sport sub-sectors for the economy

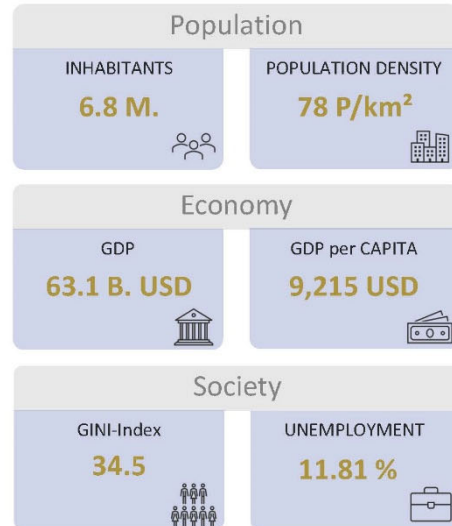


Figure C1-2. Country information

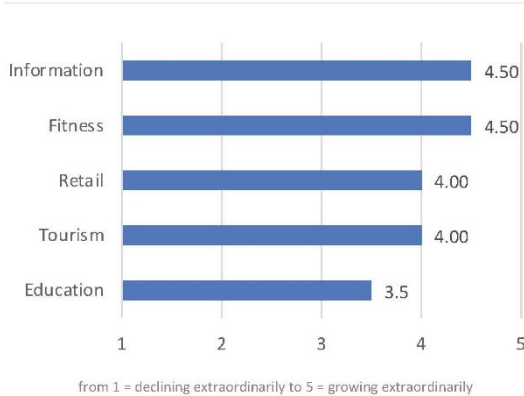


Figure C1-3. Growth potential of the sport sub-sectors

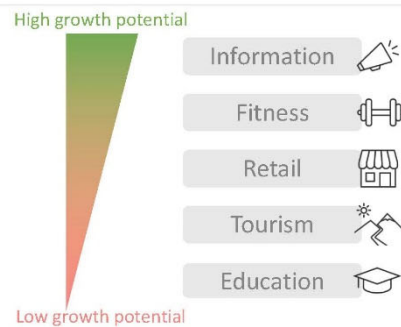


Figure C1-4. Ranked growth potential of sport sub-sectors



Figure C1-5. Ø number of qualified applicants per job opening



Figure C1-6. Difficulty to find qualified employees



Figure C1-7. Importance of the sport sector as an employer

n = 2; Average years of professional involvement in the sport sector (M = 11.0 years)

Figure 36. Economic importance of and employment situation in the sport sector of Serbia

The experts noted that basketball is the sport that receives an enormous investment sum in Serbia. Local tycoons and sports managers often invest in sports clubs hoping for a quick windfall, but they are rarely successful. Moreover, because the clubs receive government support, they have little incentive to modernize their operations. Corruption further limits the development opportunities of sport in Serbia. Furthermore, government officials' limited understanding of the sport sector inhibits its development. More specifically, sport is frequently seen as performance-oriented and not as a grassroots movement. Across all five sub-sectors of sport, a lack of government funding and

support limits the development. The experts denote that esports and sport tourism are potential sub-sectors that have the potential to gain tracking in the upcoming years.

During the last five years, several large-scale sport events (more than 10,000) spectators have been hosted in Serbia. For instance, the World Athletics Indoor Championships or football matches from Red Star Belgrade. In addition, the European University games and the 2021 AIBA World Boxing Championships were hosted in Serbia. Figure 37 gives an overview of selected sport events in Serbia.

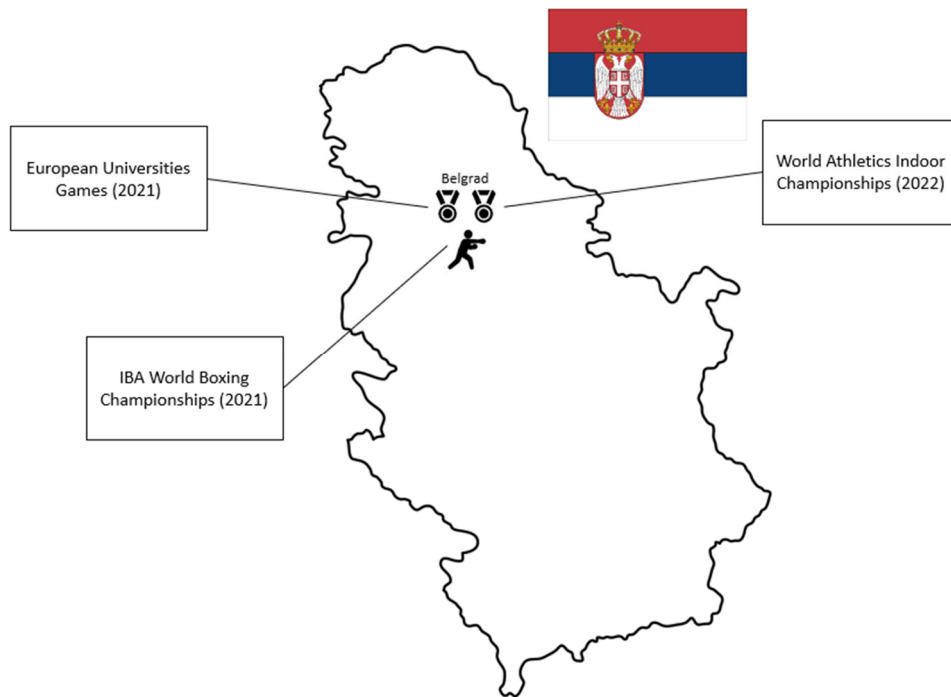


Figure 37. Past and upcoming large-scale sporting events in Serbia

### 5.9.3 Social and cultural relevance of sport

The one interviewee from the voluntary sector described Serbia as a country where elite athletes are revered and sport is an important part of national identity. Successful athletes, such as Novak Djokovic in tennis, Ivana Španović in athletics, and Nikola Jokic in basketball, are part of the reshaping of culture after the Yugoslavian war. Stadia are regularly full for matches of football and basketball. Other popular sports are water polo, tennis, and athletics.

However, when it comes to active participation and grassroots sports, there is a big gap, with only around 5-6% of Serbian adults being active regularly.

*“So, we are maybe the world champions in water polo. We are maybe the best in tennis and athletics, but when we speak about grassroots sports and regular citizens of the country, it’s not so common for the people to go out and to work out” (SRB1VOL).*

The National Olympic Committee is trying to address that with grassroots initiatives such as the European week of sport.

#### 5.9.4 Economic potential and trends in the sport sector

Through the three ministries involved in sport (Ministry of Education, Ministry of School, and Ministry for Youth and Sport), the government is financing sport on different levels, from national to municipal levels. Other funders are the Serbian school sport federation, the Serbian Olympic Committee, and smaller sport federations.

Sport betting is legal in Serbia and has become a booming business in recent years. There are many betting shops all over the country, betting companies are also sponsoring sports teams, clubs, and even federations. This was described as a potential challenge to integrity standards. Sport tourism was seen as a growing sub-sector. Based on desk research, anecdotal evidence revealed that some travel agencies already offer sport tourism activities in Serbia. However, there seemed to be more growth opportunities.

Serbia has been hosting an increasing number of international sports events, such as the world championship in athletics, the European championships in water polo, and the final four in Euro league basketball. They took advantage of its central location in Europe and relatively low cost compared to other European countries. Sport infrastructure was described as needing upgrading and reconstruction since many venues still date from the bid for the 1992 Olympics.

The start-up scene is not dominant in sport. However, there are small ventures for running, outdoor fitness, and swimming. Entrepreneurs from all sectors can apply for government support for their start-ups.

#### 5.9.5 Education and employment

Serbia does not have a sport university but several universities with a sport and physical education faculty. Most graduates work in schools as physical education teachers or coaches. However, physical education in schools was still considered insufficient. This is related to PE starting formally from Grade 5. From Grade 1-4, pupils receive PE lessons from a general, non-PE teacher, negatively affecting PE quality.

Sport management programmes are only currently offered by private universities, which do not enjoy the best reputation. The Serbian Olympic Committee has a programme for elite athletes to prepare them for their careers after sports. This programme supports them to continue or to start working in sport, for example, as entrepreneurs, administrators, or coaches. In general, the employment opportunities in the voluntary sport sector, including clubs and federations, were described as very limited, as politics often play a role in appointments.

*“It’s hard to find a job let’s in the sports sector, if you haven’t been an elite athlete, or if you haven’t been playing any kind of sports.” (SRB1VOL)*

The recommendation was to study a specific non-sport degree like law or management and then show personal initiative, for example, through volunteering for local clubs and events.

### 5.9.7 Competencies for the sport sector

Finding a job in the sport sector requires individuals to obtain specific competencies. Analysing ten job ads from Serbia's sport sector gave a better understanding of the required knowledge attributes, skills, abilities, and other competencies individuals should acquire for a successful application process (see Figure 38).

#### Central competencies for sport sector jobs in SERBIA

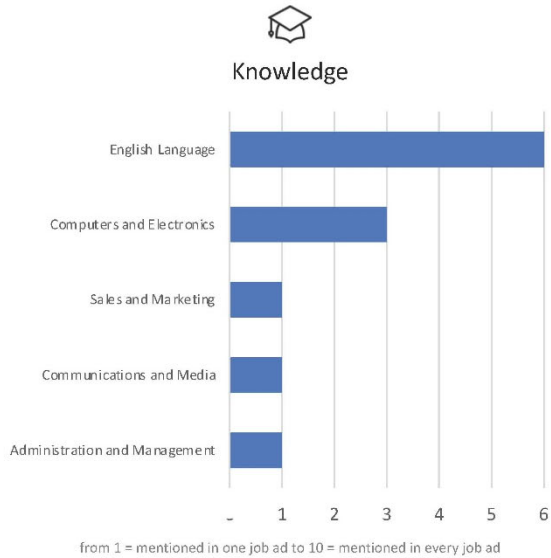


Figure P1-1. Frequency of knowledge attributes in sport sector job offers

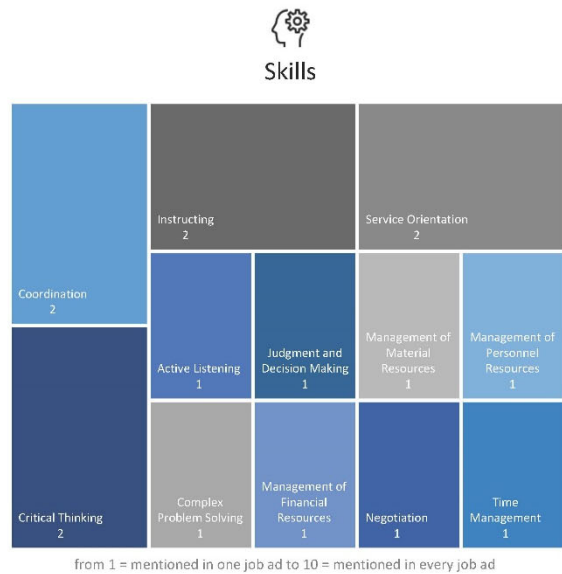


Figure P1-2. Frequency of skill attributes in sport sector job offers

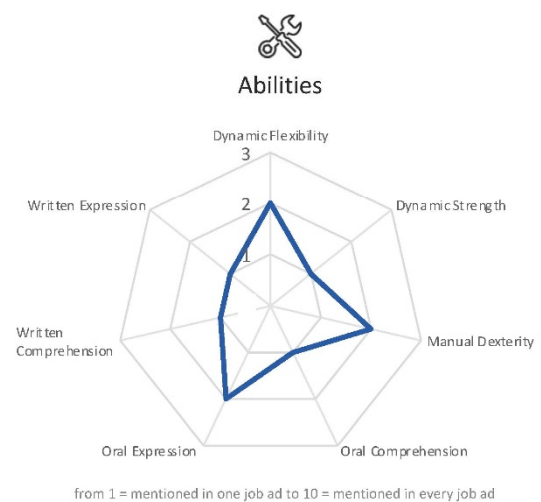


Figure P1-3. Frequency of ability attributes in sport sector job offers

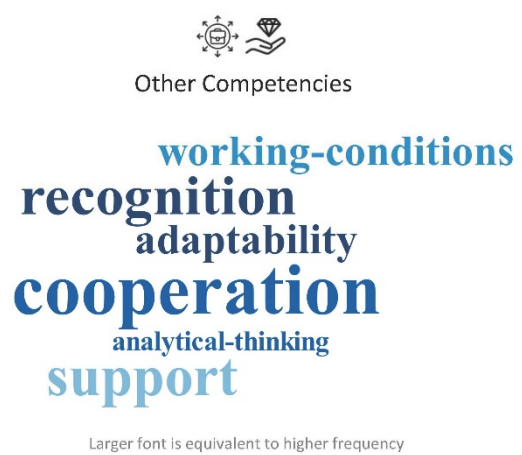


Figure P1-4. Representation of other competencies in sport sector job offers

Ten current (2<sup>nd</sup> quarter 2022) job offers were analysed to assess the required competencies in the national sport sector. The frequencies result from matching the job offers with a set of defined competencies. Job titles of the analysed job offers: Project Manager; Riding instructor; Animators; Sports equipment salesperson; Sports flooring carpenter; Fitness center manager; TV sports editor in Italian; Java Developer - Sports Betting; Senior Frontend Developer Sports Betting and Gaming Industry; Fitness coach

Figure 38. Central competencies for sport sector jobs in Serbia



Six of ten analysed job openings required candidates to know the structure and content of the English language, including the meaning and spelling of words, rules of composition, and grammar. Furthermore, three job ads mentioned knowledge of circuit boards, processors, chips, electronic equipment, and computer hardware and software, including applications and programming, as relevant.

A rather heterogeneous result was obtained regarding Serbia's required skills for sport sector jobs. Two of the ten job ads mentioned critical thinking, coordination, instruction, and service orientation as vital skill attributes. However, the limited number of mentions made a general assessment problematic. Similarly, dynamic flexibility, manual dexterity, and oral expression were also mentioned twice. Cooperation, as another competency, was mentioned four times in the analysed job ads. This indicated that employers seek individuals that are pleasant with others on the job and display a good-natured, cooperative attitude.

The country expert reported that job advertisements in Serbia were still quite old-fashioned and relatively short. This implied that employers do not have to work hard to find potential employees due to high unemployment. In addition, formal requirements were generally valued higher by employers than skills. In other words, a degree may be more critical than skills.

Moreover, the internal values of employers were rarely shared. It seemed that only companies from highly-competitive industries like IT include them in hopes that they will gain an edge over their competitors regarding hiring. Due to high levels of the grey economy where workers were not insured and paid on time, certain work conditions were sometimes advertised as perks (e.g., full reported status or regular salary). A sport industry did not exist per se. Only a handful of other industries active in sport (e.g. retail) were hiring – this results in a limited number of job adverts. Betting companies were huge and tended to exploit their workers where a single worker functions as a betting operator receiving bets, managing administration and stockpiles, serving drinks to patrons and cleaning the premises. Internships or volunteering opportunities were rarely advertised publicly by sports entities.

## 5.10 Tunisia

### 5.10.1 The national sport system of Tunisia (Author: Zakia Bartegi)

Since Tunisia's independence in March 1956, the government has invested heavily in mentally and physically healthy youth capable of raising the national flag in all areas. Based on the slogan "a healthy mind in a healthy body" and being convinced of the educational role of sport, the first post-independence government created the Ministry of Youth and Sport in 1956. The Ministry was responsible for preparing and implementing the government's policy on youth and sport activities within and outside the school environment.

#### 5.10.1.1 Organisation of sports structures in Tunisia

The sport system is based on the law N° 94-104 from 3 August 1994. It concerns the organisation and development of physical education and sport activities (Government of Tunisia, 1994). The Ministry of Youth and Sports leads it with its various specific services (Ministère de la Jeunesse et des Sports, n.d.). There are several responsibilities, such as outlining sport policies and organising

the general directorates. Since its independence, the Tunisian government has based its sports policy on the educational role of PE. It has created training institutes for sport managers such as the Institut Supérieur de l'Education Sportive de Ksar Saïd. There are four sports institutes throughout the country.

Different stakeholders are involved in the Tunisian sport system. An overview is depicted Figure 39.

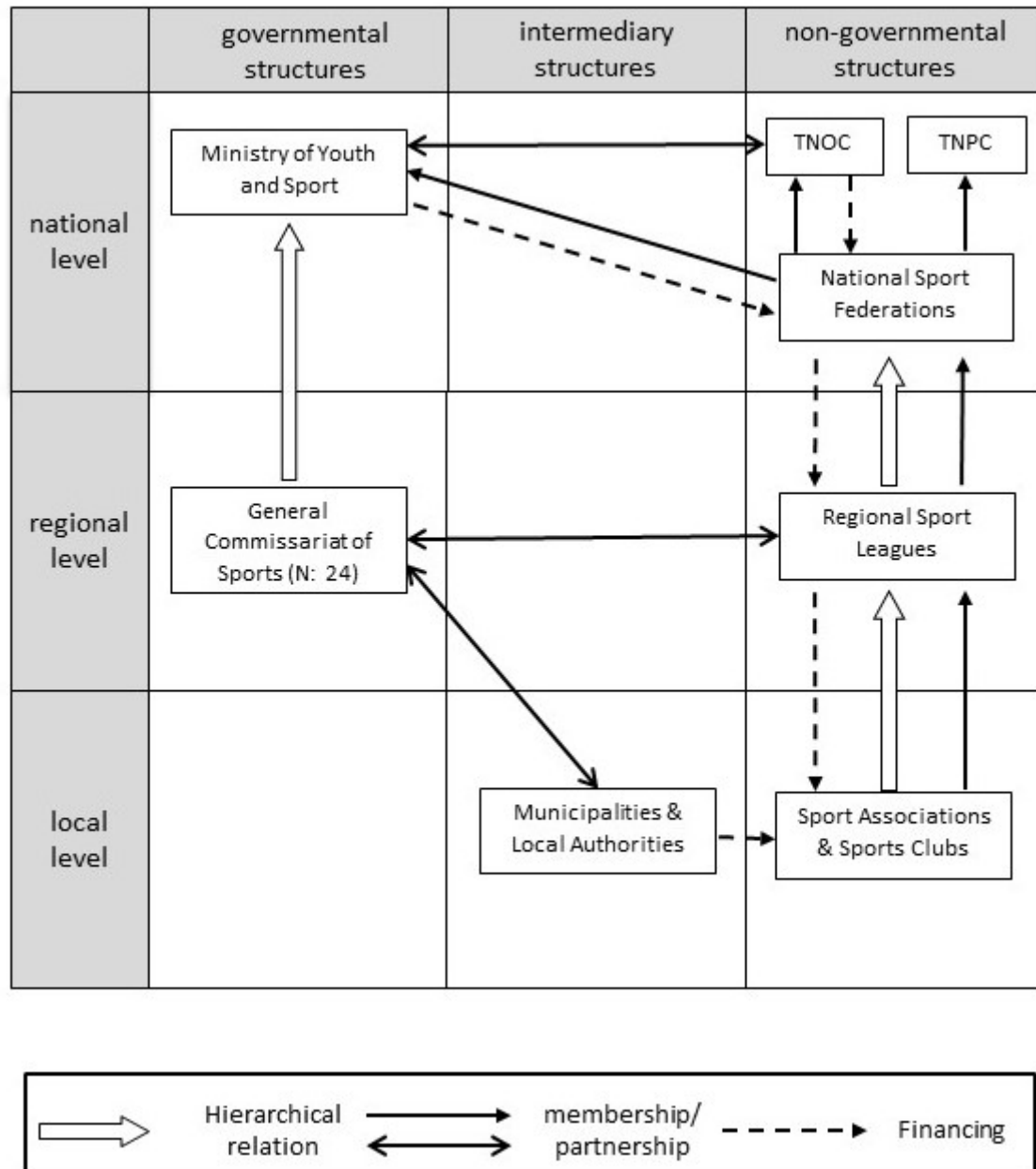


Figure 39. Structure of the national sport system of Tunisia

**Directorate General of Sport.** The Directorate General of Sport manages elite sport and sports structures with its specialised directorates and collaborates with the different national federations. They are responsible for setting the necessary evaluation strategies and useful regulations for good governance. The state is in charge of the development of elite sport. However, it also encourages the participation of public and private institutions in developing sports activities. The state is also

authorised to plan and build sport facilities and venues (Government of Tunisia, 1994). Local authorities and municipalities are responsible for managing these facilities and their maintenance. They provide funds for creating major sports infrastructure throughout Tunisia, such as sports cities, sports complexes and their maintenance (e.g., a number of stadia, swimming pools, and athletics tracks). The municipalities typically remain responsible for the maintenance of the regional infrastructure.

**General Directorate of Physical Education, Training and Research.** The General Directorate of Physical Education, Training and Research manages physical education programmes, sports activities in schools, and their pedagogical inspection. Moreover, they organise the training and scientific research system at various training institutes for sport managers.

**General Directorate of Physical Education at the Ministry of Youth and Sports.** The General Directorate of Physical Education at the Ministry of Youth and Sports manages the PE programme for primary schools, colleges, high schools, and faculties as a compulsory subject, like other teaching subjects. However, due to a lack of sport facilities in schools in some cases and a lack of teachers in others, physical education is not fully generalised, especially in primary education. The Ministry trains and pays the supervisors. The Ministry of National Education recruits them (Government of Tunisia, 1994).

**Directorate General of Common Interests.** The Directorate General of Common Interests ensures the success of the Ministry's policy through good governance of human resources, financial affairs, monitoring of regional activities, general inspection, organisation of IT tools, management of documents and documentation, and management of buildings and equipment. Twenty-four regional directorates or delegations have been created to better develop sport activities throughout the country. Each operates in one governorate. These regional entities are organised similarly to the Ministry (Ministère de la Jeunesse et des Sports, n.d.).

**The National Olympic Committee.** Following independence on 20 March 1956, the Tunisian Athletics Federation took the initiative to convene the newly created sports federations to launch the project of a National Olympic Committee. A final agreement was reached on 20 May 1957. On 27 May 1957, the representatives of 17 federations adopted the committee's statutes. During the IOC Session on 23 September 1957, the NOC was officially recognised. The NOC's strategy is based on sport performance, anchoring Olympic values, and appropriation by young people and all citizens (Tunisian Olympic Committee, n.d.). Its mission is

- to participate with the public authorities and the national federations in developing the Olympic Games, and Tunisian sport,
- to promote the Olympic spirit and values among young people and within society, and
- to strengthen the presence of women in sport and in associations and federations.

The Tunisian National Olympic Committee CNOT relates to law 94-104, articles: 21-22 and 23 (Government of Tunisia, 1994).

**Tunisian National Paralympic Committee.** The Tunisian National Paralympic Committee is of recent creation. It manages the participation of the Tunisian Paralympic athletes in the Paralympic competitions (International Paralympic Committee, n.d.).

**The National Sport Federations.** The national federations' operations refer to laws 94-104 (Government of Tunisia, 1994) and 95-11 (Government of Tunisia, 1995). The number of federations has increased from 17 national federations after independence to 45 federations today. Most Olympic and non-Olympic sports are organised within a federation (Ministère de la Jeunesse et des Sports, n.d.). A sports federation organises and promotes the practise of its discipline(s), from leisure activity to high-level sport. It is the union of sports associations. The most popular federations in Tunisia are Football, Handball, Volleyball and Basketball, and the national federations of individual sports such as athletics or combat sports.

**Sports clubs.** There are approximately 800 sports clubs in Tunisia. The organisation of sports clubs and associations is based on law 104-94 Title I, chapters IV, articles: 24-25-26-27 and 28, chapter V, articles: 29-30-31 and 32 (Government of Tunisia, 1994). Some clubs offer multisport, whereas some clubs offer one sport only. The purpose of the sports clubs is to develop the practise of one or more sports. Commonly this is facilitated through offering sport activities. To access competitions, the association must be affiliated with a sport federation. These associations have the mission to develop one or more sports, ensure young people's training, and prepare them for competitive sports in an amateur or non-amateur setting. The association must be affiliated with a national federation to access competitive sport.

**Municipal sport services.** The municipal sport services are at the level of municipalities, intermediate entities (semi-governmental bodies) of Tunisian cities and communities responsible mainly for regional infrastructures and some sports events on their territory.

#### 5.10.1.2 Funding for sport activities

Each year, the Ministry of Youth and Sports discusses a general budget with the government for Title 1 (services) and Title 2 (investment). Within the Ministry, the Directorate General for Sports plans budget subsidies for each national federation. This is related to determining the preparation and competition activity programme of each federation, knowing that state subsidies remain the only means for most national federations due to a lack of finances from sponsors or other private investments.

Another source of financing is the Promosport sports betting company in Tunisia. Promosport is a public company under the supervision of the Ministry of Youth and Sports created by law 84-63 of August 6, 84 and relating to the organisation and development of physical and sports activities (Government of Tunisia, 1984). It is noted that the proceeds of Promosport are among the most important financing mechanisms of the National Fund for the Promotion of Sport. Part of the revenue is reserved for new construction and the promotion of sport through grants to clubs, especially individual and women's sports. The third financial source are municipalities and local authorities who can reserve part of their budget for the promotion of sport in their region, for the maintenance of sport facilities, and for subsidies for local clubs.

There are two important areas in the Tunisian sports policy. The government is convinced that their development marks the rise of sport in Tunisia. These areas are women's sport and sports medicine.

- 1) Development of women's sport: A department responsible for developing women's sport has been inaugurated. This department is led by a woman and encourages national feder-

ations and sports clubs to have female members. This helps promote Tunisian sport internationally as most international medals (especially in individual sports) were won by female athletes.

- 2) Development of sports medicine in Tunisia: General policy in Tunisia has always given an important place to the health of citizens. To ensure the health of Tunisian athletes, a first sports medicine unit was created in 1967. Then this unit developed into a Centre National de Médecine du Sport (national sports medicine centre; Government of Tunisia, 1993). A very significant development of its services, occurred with the move from a centre of curative medicine to preventive and then predictive medicine with the creation of the National Centre for Medicine and Sports Sciences (CNMS; Government of Tunisia, 2003) with its research laboratories, its re-training and recovery services as well as high-level care services. The CNMS has even planned to develop sports services as a preventive and/or curative health factor. Over the years, the state has created eight regional centres of sport medicine, all linked to the CNMS.

**Conclusion.** Despite all of the above and the Tunisian state's will for ideal sport development in Tunisia, there is still a lot to be done for lack of financial means. The priorities and financial resources of the state are constantly decreasing. Thus, several planned projects have not been accomplished. Besides, several federations cannot ensure their participation in sport competitions and training sessions abroad, and new sports executives are left unemployed.

In addition, the Tunisian legal framework, which governs associations and sports structures (Government of Tunisia, 1995) must be updated. This would allow sports structures and associations to have lucrative activities likely to provide new funds for the promotion of sport through sponsorships, for example. It is necessary to find other financing sources and modify the sports and sports participation regulations to lighten the Tunisian state's responsibility.



### 5.10.2 Country profile

The Republic of Tunisia is located in the northern part of Africa with direct access to the Mediterranean Sea. With its 12 million inhabitants, the African country generated an annual GDP of 46.8 billion USD (The World Bank, 2022b). Hence, the GDP per capita equated to 3,924 USD. In 2019, 13.8% of the Tunisian workforce was employed in the agricultural sector. Hence, they were involved in agriculture, hunting, forestry, and fishing (The World Bank, 2022b). The Gini-Index of 32.8 indicated a relatively equal distribution of income. The share of the labour force without work but available for and seeking employment was just below 17%. Figure 40 presents an overview of the economic importance of sport in Tunisia.

## Info sheet on the economic importance of the sport sector and the employment situation

### TUNISIA

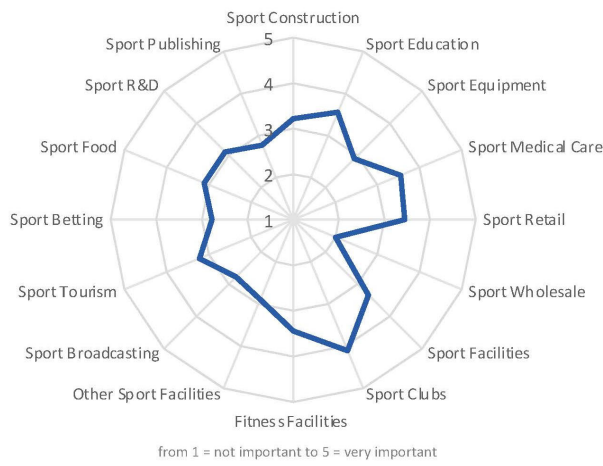


Figure C1-1. Importance of the sport sub-sectors for the economy



Figure C1-2. Country information

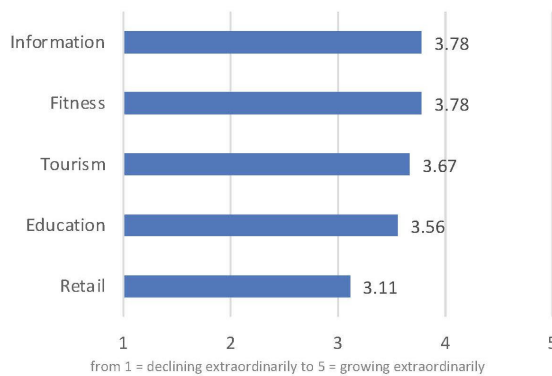


Figure C1-3. Growth potential of the sport sub-sectors

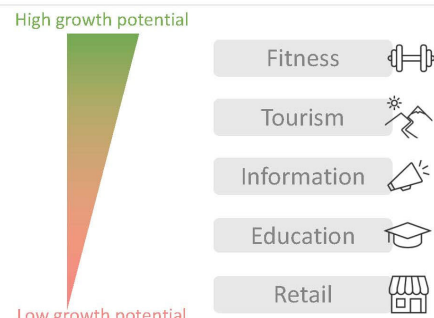


Figure C1-4. Ranked growth potential of sport sub-sectors



Figure C1-5. Ø number of qualified applicants per job opening



Figure C1-6. Difficulty to find qualified employees



Figure C1-7. Importance of the sport sector as an employer

n = 9; Average years of professional involvement in the sport sector (M = 15.7 years)

Figure 40. Economic importance of and employment situation in the sport sector of Tunisia

When asked about investments in the sport sector, the experts reported that the government's interest in sport is declining. Hence, government investments in sport became a lower priority. However, over the last years, investments in sporting infrastructure have been made. Predominantly, these investments were made so that sporting infrastructure conforms to international standards. In the private sector, sport tech is getting more attention from investors. Beyond this,

the fitness and well-being sub-sector invests in its infrastructure as the Tunisian population is becoming increasingly health conscious. This trend is further reflected through investments in the sport equipment sub-sector.

In the development of Tunisia's sport sector, various challenges were reported. For instance, infrastructure financing, construction, and maintenance appeared to be challenging. Moreover, complicated and complex regulations hindered the development of the sport sector. In addition, the experts reported a lack of qualified individuals in government positions and sport federations. Finally, a lack of sporting equipment for various sports has been pointed out. The experts were further asked to outline the most pressing challenges in the five sub-sectors. Overwhelmingly, the experts reported that a lack of government funding and support challenges the development of all sub-sectors. Beyond this, a lack of available infrastructure challenged the sport tourism sub-sector. The sport education sub-sector was confronted with the poor condition of sporting infrastructure.

In terms of employment, the experts reported that coaches, technical staff, and managers are sought after by sport federations. Moreover, the health sector was actively promoting jobs as fitness instructors. In addition, private trainers and online coaches were demanded to keep up with the growing health consciousness in the Tunisian population. Finally, sport event organisers were required to plan and execute high-performance sports events in Tunisia. The experts noted that in recent years, some large sport events (more than 10,000 spectators) had been hosted in Tunisia. For instance, football, taekwondo, and basketball competitions attracted large crowds. In addition, an annual tennis competition is hosted in January and marathons (the Carthage Race and Marathon International des Oliviers) are staged throughout the year. Figure 41 presents a selection of past and upcoming sport events in Tunisia.



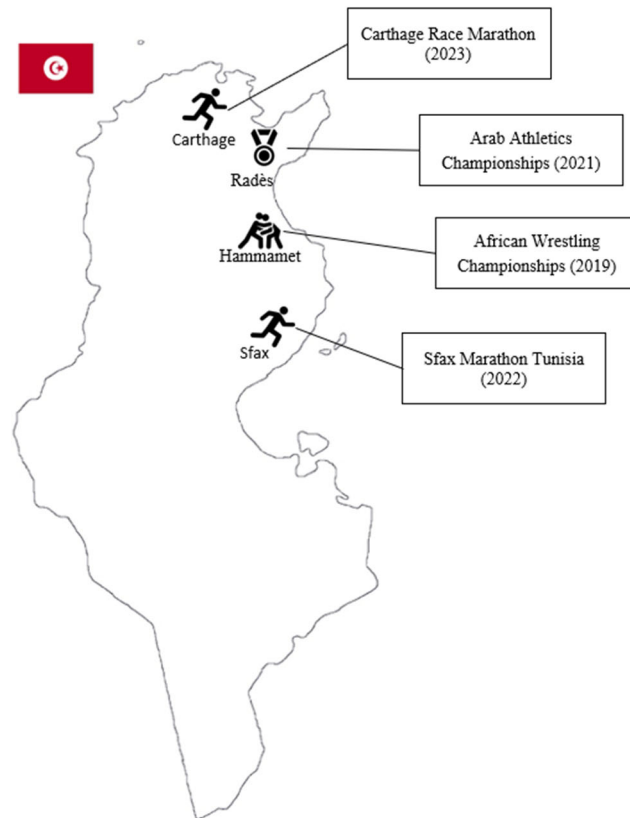


Figure 41. Past and upcoming large-scale sporting events in Tunisia

### 5.10.3 Social and cultural relevance of sport

The four interviewees from the public and for-profit sector described Tunisia as a nation with a long history in sport.

*“Typical Tunisian houses consist of four corners, four sides and in the middle all the time there are patios in the middle of the house. And there very often in the old houses, you find in the corners workshops for practising sports.”<sup>42</sup> (TUN1PUB)*

Tunisians get introduced to sport through schools and physical education from a young age. Many become part of sports clubs later on to practise team sports like football, handball, volleyball, rugby, or basketball, as well as individual sports like karate, judo, taekwondo, athletics, tennis, or swimming. While the sports clubs are non-profit organisations, they have started to take membership fees to cover basic operational costs. However, they are mostly still affordable in comparison with private academies.

Women and girls take part in all kinds of different sports. Tunisian female football teams participate in the newly founded CAF Champions League. Tennis has also been very popular with females. Women and girls sometimes still face higher hurdles than their male counterparts in getting access to sports clubs and facilities. One interviewee estimated the ratio of participation at 30% female.

<sup>42</sup> „Les maisons tunisiens typiques se constituent de quatre coins, quatre côtés et au milieu tout le temps il y a des patios dans le milieu de la maison. Et là très souvent dans les anciennes maisons, tu trouves dans les coins des ateliers de pratique de sport.“

By far the most followed sport in Tunisia is football, with the men's national team regularly qualifying for continental and world cups, and the national league attracting spectators to the stadia. Other spectator sports include athletics and swimming, where athletes regularly win medals. Boxing and cycling were also mentioned. Most recently, the tennis player Ons Jabeur has reached the finals of Wimbledon and the US Open, and ranked top 4 in the world, which has been a source of pride for many Tunisians.

#### 5.10.4 Economic potential and trends in the sport sector

The sport sector is largely run and financed by government organisations. The two ministries in charge of sport are the Ministry of Education, which is in charge of planning physical education in schools, and the Ministry of Youth and Sport, which trains and pays physical educators. The Ministry of Youth and Sport also finances the sport federations, which are in charge of sports clubs.

The legislation in Tunisia requires that sports clubs are registered as associations and are not allowed to engage in any commercial activity. This makes it extremely difficult for clubs to generate income from sponsorships and commercial activities. Instead, a patronage model has become common. This means that high-net-worth individuals invest or donate funds to cover the clubs' operational costs and receive tax breaks in return. Several interviewees criticised this model as they described it as outdated and detrimental to the sector's growth. However, in recent years, the sports clubs have started de-facto to engage in more commercial activities and the current legal system is being reviewed. For now, the main sponsors and/or patrons in the sport sector are approximately 80% Tunisian and 20% foreign, with telecommunication companies, telephone operators, food-stuff, betting, and aviation companies sponsoring teams and federations. Sports betting is legal in Tunisia, with the biggest provider being the state-sanctioned online betting company Promosport. However, several other local and international providers have started entering the market, offering services and sponsoring football teams.

Tunisia hosted the Mediterranean Games twice, in 1967 and 2001, which led to the building and upgrading of infrastructure. Moreover, due to its mild climate and good infrastructure, Tunisia is a popular country for European football clubs for winter training camps. Sport tourism is something that already exists and, according to several interviewees, has the potential to be expanded.

*“So not all sea activities are developed here. All sea activities, without mentioning sports - but we can mention: sailing, canoeing, rowing. All sports, diving, scuba diving and so on. All these activities are not sufficiently developed and we are losing a lot of tourists. We do not do what is necessary for sports tourism to find its place in the organisation of Tunisian tourism.”<sup>43</sup> (TUN2PUB)*

Overall, government institutions highly regulate and manage the sport sector directly or indirectly. However, the private sector is growing and increasingly investing in organised sport.

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43 „Donc toutes les activités de mer ne sont pas développées chez nous. Toutes les activités de mer, sans citer des sports - mais on peut en citer: la voile, le canoé, l'aviron. Tous les sports, la plongée, la plongée sous-marine et cetera. Toutes ces activités ne sont pas suffisamment développées et c'est énormément de touristes que nous sommes en train de perdre. On ne fait pas le nécessaire pour que le tourisme sportif puisse trouver sa place dans l'organisation du tourisme tunisien.“

### 5.10.5 Education and employment

Since the 1950s, young Tunisians have had access to physical education and sport through their schools and universities. They could choose between different disciplines, such as handball, volleyball, and gymnastics, and take part in interschool competitions. However, equipment and infrastructure are often insufficient to ensure sport and PE quality.

Three sport faculties in Tunis, Sfax and Kef offer physical education, physiotherapy, and coaching programmes: Institut de Tunis de Ksar Said, Institut de Sfax, and Institut Supérieur du Sport et de l'Éducation Physique du Kef. However, there are currently no sport management programmes. This means sport administrators and managers usually study other degrees, like general business degrees, human resources, or finance, and then enter the sport business. Obtaining a sport management degree was mentioned by one interviewee as a clear advantage for graduates to be employable.

*“That's very important because the companies [over the] last years [are] very focused on hiring some people who study management of sports. Because when you study sport management, you have more and more chances to be hired by the companies and the clubs.”  
(TUN3FPR)*

Employment opportunities were identified in physical training, rehabilitation, mental coaching, and physical education. Overall the number and quality of young, educated professionals were estimated to be high. However, landing a job was described as challenging, as the number of graduates is higher than the number of opportunities. One interviewee described that it can take up to 10 years to be appointed to a school for a teaching graduate. Another one mentioned that clubs are still largely run by volunteers.

*“Because there, at the club level, it's 90% volunteers. [...] So, except the administration – only the administration and the players are paid. For everything else, the managers, the leaders, all are volunteers.”<sup>44</sup> (TUN4FPR)*

Potential employers were listed as schools, ministries, municipalities, organising committees, the NOC, federations, and clubs, especially in football and handball. Other areas of activity for young graduates were mentioned as start-ups, however, with a need for guidance and support in this area. Overall, the low level of commercialisation and lacking infrastructure were mentioned as inhibiting factors for employment in the sport sector.

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<sup>44</sup> „Parce que là, au niveau des clubs, c'est à quatre-vingt-dix pour cent bénévoles. [...] Donc, sauf l'administration - seulement l'administration et les joueurs ils sont payés. Pour tout le reste, les responsables, les dirigeants, tous sont des bénévoles.“

### 5.10.6 Competencies for the sport sector

Working in the sport sector requires individuals to develop competencies that adequately fit vacant jobs. To identify the requested competency profiles for sport sector jobs in Tunisia, eight job offerings were analysed regarding knowledge attributes, skills, abilities, and other competencies (see Figure 42).

## Central competencies for sport sector jobs in TUNISIA



Figure P1-1. Frequency of knowledge attributes in sport sector job offers

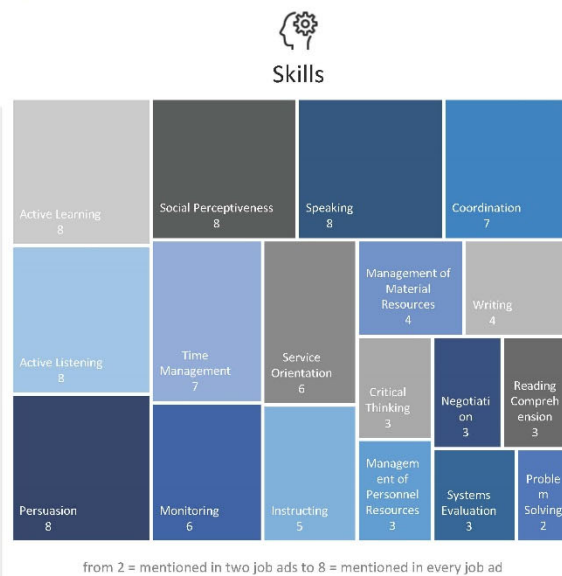


Figure P1-2. Frequency of skill attributes in sport sector job offers

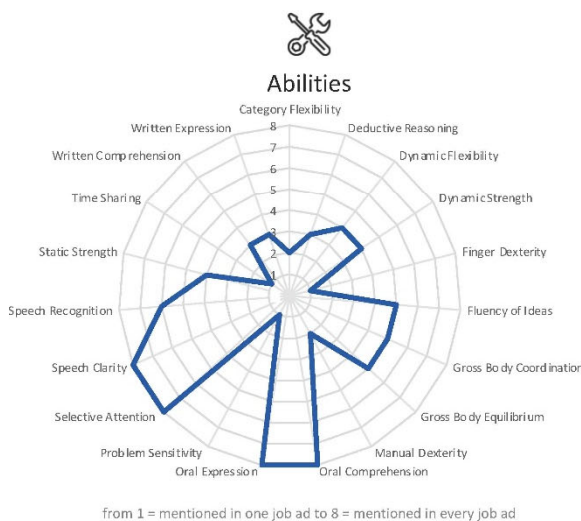


Figure P1-3. Frequency of ability attributes in sport sector job offers



Figure P1-4. Representation of other competencies in sport sector job offers

Eight current (2<sup>nd</sup> quarter 2022) job offers were analysed to assess the required competencies in the national sport sector. The frequencies result from matching the job offers with a set of defined competencies. Job titles of the analysed job offers: Journaliste Pluri média de Sport ou de Culture; Coach Sportif; Chargé Clientèle; Coach de Plateau Femme; Moniteur / Animateur Sports Terrestres (H/F); Hôtesse d'Accueil; Animateur Sportif / Animatrice Sportive; Vendeur(se)

Figure 42. Central competencies for sport sector jobs in Tunisia

All eight analysed job offers indicate that the English language is a crucial knowledge attribute for sport sector jobs in Tunisia. Hence, individuals should be familiar with the English language's structure and content, including the meaning and spelling of words, rules of composition, and grammar. Beyond this, knowledge of human psychology might increase the chances of a successful job application. Consequently, job candidates might want to obtain knowledge of human behaviour and performance; individual differences in ability, personality, and interests; learning and motivation; psychological research methods; and the assessment and treatment of behavioural and affective disorders.

The analysis further showed that five skills seem essential for sport sector jobs in Tunisia as all job postings mentioned them. These skills were persuasion, active listening, active learning, social perceptiveness and speaking. Thus, individuals ought to be able to persuade others to change their minds or behaviour and give full attention to what other people are saying, taking time to understand the points being made, asking questions as appropriate, and not interrupting at inappropriate times. Moreover, employers in Tunisia looked for individuals who understand the implications of new information for both current and future problem-solving and decision-making, being aware of others' reactions, and understanding why they react as they do. Finally, job applicants should be capable of talking to others to convey information effectively.

The job posting analysis identified four essential abilities. These were oral comprehension, oral expression, speech clarity, and selective attention. Oral comprehension and expression related to the ability to listen to and understand information and ideas presented through spoken words and sentences on the one hand and, on the other hand, to communicate information and ideas in speaking so others will understand. Job applicants should complement this through the ability to speak clearly. Moreover, employers tended to seek individuals who can concentrate on a task over time without being distracted.

The analysis of the eight job offers identified several other competencies crucial for a successful job application in Tunisia's sport sector. These included adaptability, attention to detail, concern for others, cooperation, independence, integrity, self-control, social orientation, and stress tolerance.

## 6 Discussion and Implications

The results provide several strategic avenues for sport policy-making and sport management. Two core objectives which might be suitable in the investigated countries are creating an event portfolio and leveraging sport events for sport participation and development. Both objectives can be intertwined. This could entice economic growth of the sport sector. Depending on emphasising different areas, some of the sport sub-sectors can be targeted – based on the best potential as determined by the country survey respondents.

**Creating an event portfolio.** Hosting sport events can be a chance to create an event portfolio for a country. However, hosting sport events also requires a strong workforce, commonly paid employees and volunteers. These volunteers are often episodic volunteers, that is, they volunteer for a one-time event (Cnaan et al., 2022). It does not require a long-term commitment and has gained popularity (Cnaan et al., 2022). It is an excellent opportunity for young people to make first contact with the sport sector. Quality training for the event, professional communication by the event owner, and volunteer appreciation increased the satisfaction of volunteers across countries (Okada et al., 2022). In turn, satisfaction is an essential driver of intent to volunteer again. Volunteer retention is also important in the event industry (despite the focus on episodic volunteers), as a volunteer inventory can help create an event portfolio. Bogota, for instance, strives to become a sport city. Therefore, developing an event portfolio and an adequate volunteer workforce is recommended using a volunteer inventory. Different strategies exist considering an event portfolio – which could be used as a policy tool – (Ziakas, 2019). Capacity-building is crucial for destinations/cities when pursuing such a strategy, as the events included in the portfolio will differ in type, scale, and social networks created (Ziakas, 2019). Event portfolio strategies include

- symmetrisation with a pyramidal clustering of events based on their scale and a medium to high portfolio size;
- specialisation with any focused events scale and a small portfolio size with a niche reach;
- multi-constellation with a small to medium event scale and a large portfolio size targeting a wide reach; and
- macro-expansion embracing all event scales with an extensive portfolio size and expansive reach as target (Ziakas, 2019).

**Event leveraging.** Following an event portfolio strategy, leveraging could be another strategy for policy-makers. Chalip et al. (2017) outlined that several entities (sports organisations, event organisations, and non-sport organisations) must be involved to increase sport participation and development. Social entrepreneurs may play a key role in this “collective action challenge” (Chalip et al., 2017, p. 261). Human resources, knowledge, and physical resources play an essential role in achieving leveraging goals – of all involved entities. At the same time, the structures and systems are created to organise the event (Chalip et al., 2017). These are created based on attitudes and opinions steered by cultural values (Chalip et al., 2017).

Through these exemplary objectives, sport’s social and cultural relevance can grow. Moreover, the economic relevance of the sport sector may increase, as all the sub-sectors can contribute to an event portfolio, respectively. Hosting events requires a strong and competent workforce. Thus, ed-

ucation is important. Information and communication technologies are crucial in the event industry. Tourism is involved by catering for the needs of the participants and spectators. If the masses play sports, the fitness industry becomes more important and retail might also benefit.

## 6.1 Evaluation of and implications for the social and cultural relevance of sport

The social relevance of sport in the selected countries is often connected to active sport participation. In this context, socio-economic conditions significantly influence whether sport is seen as an important part of daily life or an optional activity or luxury. A lower GDP per capita usually means less time and disposable income for sport and physical activity. Often, it also means less time and lower quality of physical education in schools.

The cultural role of sport in the selected countries is mainly defined through passive sport participation. Passive sport participation refers to spectating and following sports in stadia, arenas, through radio, television, and social media. Successful elite athletes and teams are always a source of public pride for large parts of the population. The results revealed that sport can also have a unifying function politically and culturally and help build a national identity, especially in post-colonial and/or multi-ethnic states, where national and tribal identities can still clash. Athletics in Kenya, football in Senegal and the Ivory Coast, as well as cricket in India and Pakistan are important cultural reference points. Football plays probably the strongest role as a global spectator sport, especially through broadcasting and social media, closely followed by cricket and athletics.

Global sports can lead to bridging potential between different cultures and nations. In contrast, national sports like kabbadi in India and traditional wrestling in Senegal can have significant bonding potential for people's experience and identity. The ways in which these potentials could be explored are plentiful.

The state of physical education as well as formal education in sports-related subjects, can also be indicative of the relevance of sport in a country. Similarly, it can give pointers as to which avenue can be most promising in terms of projects, partners and implementation routes.

In summary, there are the following indications of the social and cultural relevance of sport:

- Leverage local/national sports as an entry point for projects and initiatives
- Leverage international sports for cross-country initiatives
- Engage locally-known athletes or teams as project ambassadors
- Build on existing structures to leverage projects
- Education institutions (kindergarten, schools, universities, academies, etc.) are unique entry points for a number of initiatives, such as sport participation programmes, sport value programmes, lifeskill programmes, vocational programmes, upskilling and knowledge transfer
- Set up partnerships as a value proposition for both sides, taking into consideration specific (social, cultural, economic) needs of the involved parties.
- Work with local advisors on programme strategy and implementation to ensure culturally appropriate and functional concepts

## 6.2 Evaluation of and implications for the economic potential and trends in the sport sector under consideration of the sport system

As sport's cultural and social relevance varies in each country, so does the political setup for sport. In the country analysis, it became clear that sport has varying political importance. One indicator is the Ministry overseeing sport. An exclusive Ministry of Sport exists in four countries (Colombia, Serbia, Senegal, Ivory Coast). Two countries have a Ministry of Youth and Sports (India, Tunisia). Kenya has a Ministry of Sports, Culture and Heritage, Pakistan has the Pakistan Sport Board (PSB) under the Ministry of Education, Jordan's sport is governed by the Ministry of Finance & the Ministry of Youth, and in Bosnia and Herzegovina sport falls under the Ministry of Civil Affairs. The existence of a Ministry of Sport can be indicative to the political priorities on the national level. However, it can also indicate the strategic choice of cooperation partners.

Similarly, the legal and financial frameworks for sport vary in each country. Some countries have a predominant system of amateurism, such as Tunisia, Senegal, Ivory Coast, and Kenya, and a significant public involvement in the sport sector. Some countries grant tax breaks for sports organisations or private individuals and companies supporting sports organisations, like in Tunisia and Pakistan. Other countries, such as India and Colombia, have a strong private sector, resulting in private investment and opportunities for entrepreneurs and innovators.

All these factors influence the level of commercialisation of sport, with varying degrees of public and private involvement, on the opportunities to generate revenue, and thus on employment. Generally, countries with high unemployment also struggled to employ people in the sport sector.

Despite the potential of the sport business sector (incl. all its sub-sectors) in the selected countries, other economic sectors are more important and will remain more important. For instance, agriculture is still dominant in many countries. When a shift to the service industry happens (if it has not yet happened), the sport sector could play an important role – along the general tourism sector. In some countries, the sport sector could also learn from tourism.

Start-ups provide an alternative form of employment. Some countries are already seeing significant activity in fitness, information technology (apps), and tourism. Other countries are just starting to get more traction on entrepreneurship in the sport sector.

Regarding the growth potential in the GIZ-identified sub-sectors of interest, the survey indicated that the overall top three growth sectors were ranked as fitness (10 mentions), information and communication (8 mentions), education (6 mentions), retail (3 mentions), and tourism (3 mentions).

Ranked by position, the results revealed the following: Position 1: Information and communication (5), education (2), fitness (2), retail (1); Position 2: Fitness (6), education (3), information and communication (1); Position 3: Tourism (3), fitness (2), information and communication (2), retail (2), education (1). Table 23 shows the results by country.



Table 23. Growth potential within the five sub-sectors of interest identified by GIZ

Country	Position 1	Position 2	Position 3
Bosnia and Herzegovina (n=6)	Information	Fitness	Tourism
Colombia (n=10)	Retail	Information	Fitness
India (n=8)	Information	Education	Fitness
Ivory Coast (n=9)	Fitness	Education	Retail
Jordan (n=8)	Education	Fitness	Information
Kenya (n=10)	Education	Fitness	Information
Pakistan (n=10)	Information	Fitness	Education
Senegal (n=4)	Fitness	Education	Tourism
Serbia (n=2)	Information	Fitness	Retail
Tunisia (n=9)	Information	Fitness	Tourism

Fitness, sport information and communication, and sport education seem to provide the biggest growth opportunities. This could be looked into more detail from a global strategic perspective and a country point of view.

In summary, there are the following considerations for the economic potential and trends in the sector:

- Political, legal, and financial frameworks will determine the appropriate approach for projects and partnerships
- The political institution in charge of sport could be the first point of contact
- The political institution in charge of youth or education can be another entry point
- Government policy dictates the priority and investment into the upstream and core activities in the sport sector
- Upstream activities of the sport sector (construction, education, equipment) are the foundation for many sport sector activities. If public or private actors do not sufficiently develop them, core activities and downstream activities will be more difficult to implement
- Boosting active participation in sport can economic growth in core activities of the sport sector (facilities, clubs, fitness, etc.)
- Boosting passive participation can increase economic growth in downstream activities of the sport sector (broadcasting, information & technology, betting)
- Higher private sector involvement in sport usually indicates more opportunities for entrepreneurship and start-ups
- Private companies and corporates can be partners in providing work experience, internships and knowledge-transfer projects

### 6.3 Evaluation of and implications for education and employment

The opportunities for young people to obtain formal degrees in sport management or closely related subjects in the selected countries varies based on the information obtained from the sport experts. No degree programmes in sport management seem to exist in some selected countries. These countries include Bosnia and Herzegovina, Jordan<sup>45</sup>, Pakistan, and Tunisia. Conversely, at least one sport management degree programme offered by a university is in place in Columbia,

<sup>45</sup> This is an assumption, because the interviewees mainly talked about sport studies in general which the report authors related to PE.

India, Kenya, Senegal, and Serbia. Many young people go abroad for consecutive educational degrees. A broad range of specialised knowledge for the various areas of sport management is needed as several sport experts highlighted.

Considering non-managerial areas of the sport sector, physical education degree programmes seem to dominate. However, a lack of practice and an over-reliance on theory was also reported (e.g., in Bosnia and Herzegovina). Thus, the students seem unable to develop abilities they will need later on the job. In other countries, formal requirements were developed for certain professions to ensure quality delivery of services in the sport sector. For instance, a formal qualification for fitness instructors was introduced in Columbia. However, some sport experts also criticised the lack of formal requirements and certifications for some sport professionals. This lack undermines standardisation and quality service. It also hampers a good reputation of the entire sport business sector.

It seems that in several of the selected countries, the formal qualifications and competencies are not necessarily relevant to get a job in the sport sectors. Conversely, the sport experts reported that jobs are often filled with new hires based on personal acquaintance.

Routes into the sport sector can include an appropriate formal qualification, an athletic career, or voluntary service at a major event. This is similar to many countries in Europe. However, in many European countries, formal qualifications are relevant – although individuals with a business background are also often hired. Knowledge of sport, the sport system, and its stakeholders was nonetheless noted as important prerequisites for employment.

Opportunities to professionalise the sport sector arise through hosting major events as jobs are created (though not necessarily permanently). However, they can serve as stepping stones to professionalise the sport sector in various areas.

**Excursus on sports clubs.** In the non-profit sector, full-time employed staff often interacts and relies on an additional workforce, the volunteers. The work structures are geared towards the full-time staff. The full-time employees and volunteers commonly work together – however, this depends on the type of organisation. Volunteers might play a central role, or they play a peripheral role. Organisations in the non-profit sector often grow. That is, they start with a volunteer workforce. When the organisation has grown, and the volunteers might not be able to cater to the demand, a full-time position is often created. For instance, half of the full-time staff in Germany started as volunteers. For smooth operations, appreciation of both job roles is essential, and the motivation for both types of roles needs to be valued. Those working full-time need to have an appropriate education. Service orientation is essential. However, members should not be considered solely as customers because the organisation's roots are geared towards community benefits, solidarity, and welfare (Bundesministerium für Familie Senioren Frauen und Jugend, 2015).

Summing up, this leads to several implications:

- Standardisation through certification for sport sector jobs that do not require formal qualifications such as a Bachelor's or Master's degree (including a clear overview of the needed knowledge, skills, abilities, and other characteristics)
- Competency-based education so knowledge, skills, abilities, and other characteristics can be directly applied on the job
- Transparency concerning employment opportunities and recruitment procedures

- Specialised knowledge of the vast areas of sport management is crucial. However, abilities might be even more crucial
- Volunteering and internships can also provide necessary practical experience in the sport sector, which can be achieved through events, schools, after-school programmes, etc.
- Advocates should be educated first so that they can spread the word and lead by example

#### 6.4 Evaluation of and implications for competencies for the sport sector

Depending on the respective job role, a different set of knowledge attributes is needed. Therefore, generalisations in this area are difficult to make. Nonetheless, the brief overview of skills, abilities, and other characteristics across the sport sector revealed that certain competencies might be relevant to different sub-sector jobs.

With regard to skills, complex problem-solving, coordination, judgement and decision-making, management of personnel resources, monitoring, operations analysis, service orientation, social perceptiveness, and time management were noted particularly. These skills are crucial for service delivery in all five identified sub-sectors. Concerning abilities, a clear emphasis was placed in all job advertisements on oral and written expression and comprehension. Various other abilities were also considered essential. However, there was a more heterogeneous perception in the countries and across the countries. As additional other characteristics, achievement, attention to detail, cooperation, independence, integrity, and relationships were often requested in the job advertisements across the different sub-sectors.

These findings are congruent with the implications brought forward by Müller (2021). She already emphasised the importance of core competencies that should be developed through SFP projects. Thereby, a competency-based framework could be applied within the projects so that the project participants develop, for instance, abilities which were not included in their formal education. The project participants can serve as advocates for a competency-based approach to help bring forward the different sub-sectors. Therefore, the following implications were derived:

- Knowledge is specific to the job role and sub-sector and should therefore not be a core focus of SFD projects
- As several skills, abilities, and other characteristics were identified as essential across job roles in various sport sub-sectors, these could be included as core competencies to develop for SFD project participants
- Those participants should be trained (as before) to serve as advocates for developing competencies

#### 6.5 Leveraging and potential cooperation opportunities

**Partners and organisations (Bosnia and Herzegovina).** Implementing SFD projects in Bosnia relies to some extent on partner organisations in Bosnia. For instance, the national federations were mentioned as potential partners, as they oversee the structures of a sport — for example, the Football Association or the National Olympic Committee. Moreover, the national federations are said to educate people on the sport sector and management positions. In addition, institutions in the education sector can serve as potential partners for SFD projects. This includes schools (e.g., P.E. classes) or higher education institutions. For example, Sarajevo University has a sport faculty.

**Partners and organisations (Colombia).** A range of crucial organisations in Colombia's sport sector was named. Most notably, the Ministry of Sport was mentioned. As the official government body, it oversees large areas of the national sport sector. Beyond this, the Colombian Olympic Committee and the Colombian Football Federation are responsible for most professional sporting structures. In contrast, the local and regional leagues manage amateur sports on a smaller scale. The primary sport broadcasters in Colombia (Win Sports and ESPN) were also regarded as influential organisations. Finally, sport betting companies, sport sponsors and for-profit fitness facilities conclude the listed sport organisations. Furthermore, universities were identified as potential partners. The Sergio Arboleda University, Universidad de Los Andes, and Portal Pontificia Universidad Javeriana were mentioned.

**Partners and organisations (India).** In India, a wide variety of organisations were listed as potential partners for implementing SFD projects. From the public sector, the Ministry of Sport and Youth was mentioned. As the official government body, the ministry has a good overview of India's sporting landscape. However, due to the size of the country, the provincial governments are also involved in the sport sector. Similarly to other countries, the national sports federations (e.g., the Board of Control for Cricket in India or Indian Premiere League) are valuable partners in establishing SFD projects. Beyond this, the OSCAR and the YUWA are non-profit organisations that aim to help underprivileged individuals through sport. In addition, the RISE (Reliance) was mentioned frequently as a sport organisation involved in sport sector.

**Partners and organisations (Ivory Coast).** Partnering with Ivory Coast organisations potentially increases SFD projects' success. Most notably, the Ministry of Sports was mentioned as the highest government institution dealing with sport. The knowledge accumulation, oversight and the connection to different actors in the sport sector makes the Ministère des Sports a valuable point of contact. The Fédération des 80 Fédérations sportives de Côte d'Ivoire are a collection of sport federations in the Ivory Coast. The overview of different sports potentially enables knowledge transfer. As with many other countries, the National Olympic Committee was mentioned as an organisation that can help implement SFD projects. In football, Didier Drogba was frequently mentioned as an influential individual.

**Partners and organisations (Jordan).** Collaborating with organisations from the sport sector in Jordan potentially increases the success of SFD projects. The experts noted that the Jordan Olympic Committee is a good starting point when developing projects. The overview and the connections to other sports might be valuable in establishing development projects. Additionally, the certification and standardisation across Jordan and the Arabic world was mentioned as a valuable approach for sport development projects. More specifically, the certification of coaches was seen as necessary. Finally, the king's family was named a vital stakeholder when large-scale projects ought to be developed.

**Partners and organisations (Kenya).** Partnering with organisations in Kenya likely enhances the chances of success in SFD projects. In the public sector, various organisations could serve as a starting point when projects should be realised. The Ministry of Sport is the highest public institution in Kenya concerned with sports. Hence, its overview and connections might serve valuable when establishing SFD projects. Beyond this, the Sport, Arts and Social Development Fund (SASDF) could

serve as a collaboration partner in Kenya. Beyond this, institutions of education, such as the Ministry of Education or universities, can be approached. Furthermore, the Kenyan Olympic Committee or national sport federations are potential partners in the sport sector.

**Partners and organisations (Pakistan).** To realise SFD projects in Pakistan, the key organisations and actors should be on board. Most notably, the Pakistan Sport and Cricket board were mentioned as they represent dominant stakeholders in Pakistan's sporting landscape. Also, government representatives from the local regions ought to be informed about SFD projects. One respondent outlined that most federations have political affiliations, which make individuals key actors. Furthermore, the Pakistan Olympic Committee was mentioned. The Right to Play organisation was named a major player in the sport development sector. Due to their standing or regulatory power, the organisations mentioned above might serve as valuable partners for SFD projects. However, local organisations such as schools, private sector partners, the higher education commission, or the Citizens Foundation could also be approached.

**Partners and organisations (Senegal).** Partnering with organisations in Senegal can increase the likelihood of SFD projects to succeed. On the governmental level, the Ministry of Sport oversees the sport sector in Senegal. In addition, the Institute National Supérieur de l'Education Populaire et du Sport (INSEPS) trains individuals in the field of sport education, management, and socio-cultural dimensions of sport. Hence, the INSEPS is potentially an essential partner in the educational sector. Furthermore, the Union des Associations Sportives, Scolaires et Universitaires (UASSU) is a collection of scholars involved in the sport sector. Beyond this, the National Olympic Committee of Senegal and the Youth Olympics Games Organization Committee might be valuable starting points in developing SFD projects. Finally, the Institute de Formation aux Metiers des Sports (IFM) was mentioned. The IFM is a private institution that offers professional training in sports.

**Partners and organisations (Serbia).** Collaborating with organisations in Serbia can aid the success of SFD projects. On the national level, three ministries are directly and indirectly involved in sports. The Ministry of Youth and Sport, the Ministry of School and the Ministry of Education. Moreover, the Serbian Olympic Committee potentially serves as a partner for SFD projects. Finally, the large football clubs were mentioned. Although football clubs are technically non-profit, they generate income from player transfers.

**Partners and organisations (Tunisia).** Collaborating with Tunisia's organisations might increase the chances of success in SFD projects. At the state level, the government and the ministry of sport represent essential stakeholders. In addition, the Tunisian Olympic Committee can help implement sport development projects. Similarly, the national federations can be contacted when a project might be directed at a specific sport. Finally, partners from the for-profit sector (e.g., health clubs) could be contacted.

There is considerable congruence between the countries in terms of potential partner organisations. On a national level, the ministry of sport (or the ministry responsible for sport) is a vital point of contact. In addition, the National Olympic Committees and the federations of the largest national sports were mentioned in every country. Hence a few implications can be drawn:

- Partnerships might be established by contacting governmental bodies or the respective federations



- National Olympic Committees can serve as a platform for knowledge transfer where different sports collaborate
- Governmental or non-profit organisations might be better partners in implementing SFD projects as they are less likely to face a conflict of interest

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## 8 Appendix

### 8.1 Overview and glossary of selected knowledge, skills, abilities and other characteristics areas

#### **Knowledge (U.S. Department of Labour, n.d.-f)**





Administration and management	Knowledge of business and management principles involved in strategic planning, resource allocation, human resources modelling, leadership technique, production methods, and coordination of people and resources.
Administrative	Knowledge of administrative and office procedures and systems such as word processing, managing files and records, stenography and transcription, designing forms, and workplace terminology.
Biology	Knowledge of plant and animal organisms, their tissues, cells, functions, interdependencies, and interactions with each other and the environment.
Communication and media	Knowledge of media production, communication, and dissemination techniques and methods. This includes alternative ways to inform and entertain via written, oral, and visual media.
Computers and electronics	Knowledge of circuit boards, processors, chips, electronic equipment, and computer hardware and software, including applications and programming.
Customer and personal service	Knowledge of principles and processes for providing customer and personal services. This includes customer needs assessment, meeting quality standards for services, and evaluation of customer satisfaction.
Design	Knowledge of design techniques, tools, and principles involved in production of precision technical plans, blueprints, drawings, and models.
Economics and accounting	Knowledge of economic and accounting principles and practises, the financial markets, banking, and the analysis and reporting of financial data.
Education and training	Knowledge of principles and methods for curriculum and training design, teaching and instruction for individuals and groups, and the measurement of training effects.
Engineering and technology	Knowledge of the practical application of engineering science and technology. This includes applying principles, techniques, procedures, and equipment to the design and production of various goods and services.
National language	Knowledge of the structure and content of the National language including the meaning and spelling of words, rules of composition, and grammar.
Fine arts	Knowledge of the theory and techniques required to compose, produce, and perform works of music, dance, visual arts, drama, and sculpture.
Law and government	Knowledge of laws, legal codes, court procedures, precedents, government regulations, executive orders, agency rules, and the democratic political process.
Mathematics	Knowledge of arithmetic, algebra, geometry, calculus, statistics, and their applications.
Medicine and dentistry	Knowledge of the information and techniques needed to diagnose and treat human injuries, diseases, and deformities. This includes symptoms, treatment alternatives, drug properties and interactions, and preventive health-care measures.
Personnel and human resources	Knowledge of principles and procedures for personnel recruitment, selection, training, compensation and benefits, labour relations and negotiation, and personnel information systems.
Psychology	Knowledge of human behaviour and performance; individual differences in ability, personality, and interests; learning and motivation; psychological research methods; and the assessment and treatment of behavioural and affective disorders.
Public safety and security	Knowledge of relevant equipment, policies, procedures, and strategies to promote effective local, state, or national security operations for the protection of people, data, property, and institutions.



Sales and marketing	Knowledge of principles and methods for showing, promoting, and selling products or services. This includes marketing strategy and tactics, product demonstration, sales techniques, and sales control systems.
Sociology and anthropology	Knowledge of group behaviour and dynamics, societal trends and influences, human migrations, ethnicity, cultures, and their history and origins.
Telecommunications	Knowledge of transmission, broadcasting, switching, control, and operation of telecommunications systems.
Therapy and counselling	Knowledge of principles, methods, and procedures for diagnosis, treatment, and rehabilitation of physical and mental dysfunctions, and for career counselling and guidance.

### ***Skills (U.S. Department of Labour, n.d.-d, n.d.-e)***

Active learning	Understanding the implications of new information for both current and future problem-solving and decision-making.
Active listening	Giving full attention to what other people are saying, taking time to understand the points being made, asking questions as appropriate, and not interrupting at inappropriate times.
Complex problem solving	Identifying complex problems and reviewing related information to develop and evaluate options and implement solutions.
Coordination	Adjusting actions in relation to others' actions
Critical thinking	Using logic and reasoning to identify the strengths and weaknesses of alternative solutions, conclusions, or approaches to problems.
Instructing	Teaching others how to do something.
Judgment and decision-making	Considering the relative costs and benefits of potential actions to choose the most appropriate one.
Learning strategies	Selecting and using training/instructional methods and procedures appropriate for the situation when learning or teaching new things.
Management of financial resources	Determining how the money will be spent to get the work done, and accounting for these expenditures.
Management of material resources	Obtaining and seeing to the appropriate use of equipment, facilities, and materials needed to do certain work.
Management of personnel resources	Motivating, developing, and directing people as they work, identifying the best people for the job.
Mathematics	Using mathematics to solve problems.
Monitoring	Assessing the performance of yourself, other individuals, or organisations to make improvements or take corrective action.
Negotiation	Bringing others together and trying to reconcile differences.
Operations analysis	Analysing needs and product requirements to create a design.
Persuasion	Persuading others to change their minds or behaviour.
Reading comprehension	Understanding written sentences and paragraphs in work-related documents.
Service orientation	Actively looking for ways to help people.
Social perceptiveness	Being aware of others' reactions and understanding why they react as they do.
Speaking	Talking to others to convey information effectively.
System analysis	Determining how a system should work and how changes in conditions, operations, and the environment will affect outcomes.
Systems evaluation	Identifying measures or indicators of system performance and the actions needed to improve or correct performance relative to the goals of the system.
Time management	Managing one's own time and the time of others.
Writing	Communicating effectively in writing as appropriate for the needs of the audience.

### **Abilities (U.S. Department of Labour, n.d.-c)**

Category flexibility	The ability to generate or use different sets of rules for combining or grouping things in different ways.
Deductive reasoning	The ability to apply general rules to specific problems to produce answers that make sense.
Dynamic flexibility	The ability to quickly and repeatedly bend, stretch, twist, or reach out with your body, arms, and/or legs.
Dynamic strength	The ability to exert muscle force repeatedly or continuously over time. This involves muscular endurance and resistance to muscle fatigue.
Extent flexibility	The ability to bend, stretch, twist, or reach with your body, arms, and/or legs.
Far vision	The ability to see details at a distance.
Finger dexterity	The ability to make precisely coordinated movements of the fingers of one or both hands to grasp, manipulate, or assemble very small objects.
Flexibility of closure	The ability to identify or detect a known pattern (a figure, object, word, or sound) that is hidden in other distracting material.
Fluency of ideas	The ability to come up with a number of ideas about a topic (the number of ideas is important, not their quality, correctness, or creativity).
Gross body coordination	The ability to keep or regain your body balance or stay upright when in an unstable position.
Inductive reasoning	The ability to combine pieces of information to form general rules or conclusions (includes finding a relationship among seemingly unrelated events).
Information ordering	The ability to arrange things or actions in a certain order or pattern according to a specific rule or set of rules (e.g., patterns of numbers, letters, words, pictures, mathematical operations).
Manual dexterity	The ability to quickly move your hand, your hand together with your arm, or your two hands to grasp, manipulate, or assemble objects.
Mathematical reasoning	The ability to choose the right mathematical methods or formulas to solve a problem.
Memorisation	The ability to remember information such as words, numbers, pictures, and procedures.
Near vision	The ability to see details at close range (within a few feet of the observer).
Number facility	The ability to add, subtract, multiply, or divide quickly and correctly.
Oral comprehension	The ability to listen to and understand information and ideas presented through spoken words and sentences.
Oral expression	The ability to communicate information and ideas in speaking so others will understand.
Originality	The ability to come up with unusual or clever ideas about a given topic or situation, or to develop creative ways to solve a problem.
Perceptual speed	The ability to quickly and accurately compare similarities and differences among sets of letters, numbers, objects, pictures, or patterns. The things to be compared may be presented at the same time or one after the other. This ability also includes comparing a presented object with a remembered object.
Problem sensitivity	The ability to tell when something is wrong or is likely to go wrong. It does not involve solving the problem, only recognising that there is a problem.
Selective attention	The ability to concentrate on a task over a period of time without being distracted.
Speech clarity	The ability to speak clearly so others can understand you.
Speech recognition	The ability to identify and understand the speech of another person.



Speed of closure	The ability to quickly make sense of, combine, and organise information into meaningful patterns.
Stamina	The ability to exert yourself physically over long periods of time without getting winded or out of breath.
Static strength	The ability to exert maximum muscle force to lift, push, pull, or carry objects.
Time sharing	The ability to shift back and forth between two or more activities or sources of information (such as speech, sounds, touch, or other sources).
Trunk strength	The ability to use your abdominal and lower back muscles to support part of the body repeatedly or continuously over time without "giving out" or fatiguing.
Visualisation	The ability to imagine how something will look after it is moved around or when its parts are moved or rearranged
Written comprehension	The ability to read and understand information and ideas presented in writing.
Written expression	The ability to communicate information and ideas in writing so others will understand.

***Other characteristics: Work values (U.S. Department of Labour, n.d.-h)***

Achievement	Occupations that satisfy this work value are results oriented and allow employees to use their strongest abilities, giving them a feeling of accomplishment. Corresponding needs are ability utilisation and achievement.
Independence	Occupations that satisfy this work value allow employees to work on their own and make decisions. Corresponding needs are creativity, responsibility and autonomy.
Recognition	Occupations that satisfy this work value offer advancement, potential for leadership, and are often considered prestigious. Corresponding needs are advancement, authority, recognition and social status.
Relationships	Occupations that satisfy this work value allow employees to provide service to others and work with co-workers in a friendly non-competitive environment. Corresponding needs are co-workers, moral values and social service.
Support	Occupations that satisfy this work value offer supportive management that stands behind employees. Corresponding needs are company policies, supervision, human relations and supervision, technical.
Working conditions	Occupations that satisfy this work value offer job security and good working conditions. Corresponding needs are activity, compensation, independence, security, variety and working conditions.

***Other characteristics: Work styles (U.S. Department of Labour, n.d.-g)***

Achievement/effort	Job requires establishing and maintaining personally challenging achievement goals and exerting effort toward mastering tasks.
Adapability/flexibility	Job requires being open to change (positive or negative) and to considerable variety in the workplace.
Analytical thinking	Job requires analysing information and using logic to address work-related issues and problems.
Attention to detail	Job requires being careful about detail and thorough in completing work tasks.
Concern for others	Job requires being sensitive to others' needs and feelings and being understanding and helpful on the job.



Cooperation	Job requires being pleasant with others on the job and displaying a good-natured, cooperative attitude.
Dependability	Job requires being reliable, responsible, and dependable, and fulfilling obligations.
Independence	Job requires developing one's own ways of doing things, guiding oneself with little or no supervision, and depending on oneself to get things done.
Initiative	Job requires a willingness to take on responsibilities and challenges.
Innovation	Job requires creativity and alternative thinking to develop new ideas for and answers to work-related problems.
Integrity	Job requires being honest and ethical.
Leadership	Job requires a willingness to lead, take charge, and offer opinions and direction.
Persistence	Job requires persistence in the face of obstacles.
Self-control	Job requires maintaining composure, keeping emotions in check, controlling anger, and avoiding aggressive behaviour, even in very difficult situations.
Social orientation	Job requires preferring to work with others rather than alone and being personally connected with others on the job.
Stress tolerance	Job requires accepting criticism and dealing calmly and effectively with high-stress situations.

## 8.2 Overview of the studies utilised in the scoping review

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## 8.3 Survey

Table 24. Overview of the questions used in the survey

Question	QUAL / QUAN
<b>General Information</b>	
For which country would you like to fill out this questionnaire?	QUAN
What is your current job title?	QUAL
How many years have you been professionally involved in the sport sector?	QUAN
In which sport sub-sector are you currently working?	QUAN
Please rate the economic importance of the following sub-sectors for your country.	QUAN
<b>Trends</b>	
Please rate the growth potential of the sport sub-sectors in your country.	QUAN
Are you aware of any significant investments into the sport sector over the last years?	QUAN
Can you describe the sport sub-sectors in which these investments occurred?	QUAL
What trends can you currently observe in the sport sector?	QUAL
Please rank the growth potential of the following five sub-sectors of the sport sector?	QUAN
<b>Challenges</b>	
Imagine you would be tasked with developing the sport sector in your country. What are the main difficulties you would expect to encounter?	QUAL
Please rate the following challenges ( <i>Lack of Skilled Employees; Lack of Government Funding/Support; Lack of Private Investments; Lack of Available Infrastructure: Lack of Available Internet Access; Difficult Access to Sporting Infrastructure (e.g., lack of public transport); Bad Condition of Sporting Infrastructure &amp; Supply Chain Issues</i> ) based on their severity for each of the five sub-sectors of sport.	QUAN
<b>Employment</b>	
What employment trends can you observe in your country's sport sectors at the moment?	QUAL
Please indicate how important the sport sector in your country is as an employer?	QUAN
Which sub-sector employs the most individuals?	QUAN
Please name large databases which serve as an important information source on your countries sport sector's and paste links to their websites (if available).	QUAL
Please indicate how difficult it is to find qualified employees in the sports sector?	QUAN
Imagine you have a job opening for an entry-level position in your organisation. How many qualified applicants would you expect to apply?	QUAN
<b>Big Events &amp; Infrastructure</b>	
Which large sport events (more than 10,000 spectators) have been important in your country during the last five years?	QUAL
Which large sport events (more than 10,000 spectators) will be important in your country in the next five years?	QUAL
Are you aware of any major investments into sport infrastructure in the last five years?	QUAL
<b>Key Players</b>	
Which organisations or individuals are key to the sports sector in your country ?	QUAL
Which decision-makers need to be on board to ensure success when the sports sector is developed?	QUAL
Imagine you would be tasked with developing sport in your country. Which organisations (For-Profit or Non-Profit) would be ideal partners for cooperation?	QUAL
<b>Future</b>	
Which sport sector or sport project has the potential to gain traction in the next five years?	QUAL