



ESSA-SPORT

Improving the Supply of Skills to the Sector

NATIONAL REPORT

Analysis of labour market
realities and challenges in
the sport and physical
activity sector



Bulgaria

September 2019

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This national report has been produced by “*National Sports Academy (NSA)*” who are a full partner and national coordinator in the ESSA-Sport project, using the methodology and structure provided by the coordinator EOSE.





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THE ESSA-SPORT PROJECT AND BACKGROUND TO THE NATIONAL REPORT

1. THE ESSA-SPORT PROJECT AND BACKGROUND TO THE NATIONAL REPORT

a) The ESSA-Sport Project

The aim of the ESSA-Sport project, funded by the European Commission under the Erasmus+ programme, was to establish a European Sector Skills Alliance covering the full breadth of the sport and physical activity sector across the European Union. The project was a direct response to the identified needs and challenges of the sport and physical activity sector.

The 3-year project, which began in October 2016, aimed to create a knowledge base and plan for action within the sector on the key issues of skills and workforce development which are central to helping the sector grow, to equip those working or volunteering with the right skills and to enable the sector to fulfil its potential as a social, health and economic driver. The overall ambition was to create an evidential basis for change and improvement, to create a major consultation on skills and to build a lasting consultation network at national and European level to take forward the conclusions and recommendations made in national and European Reports.




The project has identified skill needs and future priorities based on national and European level research and consultation activities.

The consortium, composed of 20 national coordinators and 5 European networks, is proud to have generated new knowledge and data as well as consultation activities at all levels to support policy and priority actions in the sport and physical activity sector.

b) The National Report

This National Report presents the main findings collated and analysed through the ESSA-Sport project at the national level.

Each nation in Europe has its own specificities, realities and challenges in terms of employment and skills in sport and the aims of the national report are:

-  to describe the national sport and education systems
-  to present new knowledge gathered for the sector in terms of employment and skills
-  to propose concrete conclusions and recommendations/ priority actions for implementation at the national level.

c) The sport and education system

The first step of the overall process was for all national coordinators to conduct a series of desk research activities using a common methodology.

Firstly, in Section 2 of this report, there is a presentation of key political, geographical, economic and population factors and characteristics of the national labour market.

Section 3 presents the characteristics, evolution and future perspective of the national sport and physical activity sector/system.

The overall national education and training system is presented in Section 5 whereas the way it is specifically organised in the sport and physical activity sector is presented in Section 6.

d) Sport Labour Market Statistics

Section 4 of the national report focuses on the work carried out by national coordinators and main findings obtained in an attempt to collate available data and statistics on the sport and physical activity labour market in all EU Member States.

Indeed, to make an impact on the sector and allow it to unlock its potential to improve people's lives, it is necessary to have a precise idea of the size and characteristics of the current labour market, and information about changes and tendencies. This information has been missing for many years since the last (partial) attempt to get a European map of employment for the sector took place in 2004 (Vocasport project, EOSE 2004).

The aim of the current initiative was to fill a knowledge gap by undertaking wide research activities at both European and national levels to identify the scale and scope of employment in the emerging and growing sport and physical activity sector.

NACE is the statistical classification of economic activities in the European Community, while ISCO is the International Standard Classification of Occupations. The ESSA-Sport consortium has been successful in collecting the most relevant NACE and ISCO data related to the sport sector, gathered from National Statistics Offices and the European body Eurostat. This data on the size and characteristics of the sport labour market at the national level is presented in section 4.

e) European Employer Skills Survey

Following the desk research and collection of available statistics for the sport labour market, the focus was then to design and launch the first ever European Employer Skills Survey for the sport and physical activity sector. The objective was to consult the widest variety of employers from the sector and collate data on the labour market, skills needs, gaps and shortages, future tendencies/perspectives, realities and difficulties to recruit and retain staff and volunteers.

In the context of a dynamic and complex labour market, gathering information on current and future skill needs can support better matching of education, training and employment.

In recent years, better understanding of labour market needs and skills matching have featured prominently on the policy agenda of many countries, driven by both rapid technological advances and global competition. Skills matching can also help reduce unemployment, particularly among young people. It helps to build a better life for individuals by improving employability, social mobility and inclusion.

The ambition through the design and launch of the first ever European Employer Skills Survey for the sport and physical activity sector was to identify and analyse the growing and changing labour market, to build an up to date picture of employment, and to identify the skill needs and future priorities based on national and EU level research – building a skills map for the sector.

The main results and key information from the European Employer Skills Survey at the national level are presented in Section 7 of this report.

f) Consultations and conclusions

Once all of the employment and skills data had been gathered from sources of labour market statistics and the Employer Skills Survey conducted, the aim in each country was then to discuss and consult on the data with relevant national stakeholders, through meetings, round-tables, one-to-one discussions etc. A summary report on consultation activities implemented at the national level is presented in Section 8.

Finally, it was the aim of the ESSA-Sport project to implement a bottom-up approach and present national findings and conclusions from the entire project and all activities including desk research, data collection and consultation.

The development of recommendations and actions for the sector to tackle the identified challenges will ensure the legacy of the ESSA-Sport project as the sector builds on the data collected for sustained reforms to improve skills of paid staff and volunteers and meet the potential of the sport and physical activity sector. National conclusions and recommendations are presented in Sections 9 and 10 of this report.



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NATIONAL KEY FACTS AND OVERALL LABOUR MARKET

2. NATIONAL KEY FACTS AND OVERALL DATA ON THE LABOUR MARKET

a) National key facts and data

Figure 1. a) Bulgaria and Europe, b) Coat of Arms, c) Flag colours



The Republic of Bulgaria is a country in Eastern Europe, that spans over 110 549 square kilometres with Sofia as the capital city since 1879.

To the north it borders Romania, with most of the border following the Danube river. To the east is the Black sea, through which there is access to all Black Sea countries, without land borders, such as Ukraine, Russia, Georgia. The south-east border of Bulgaria is the outer border of the EU with Turkey, and South-west is Greece. To the west Bulgaria borders with Serbia and North Macedonia, also outer EU border.

The National Statistic Institute of Bulgaria has estimated the population as of 31 December 2018 to be 7 000 039 people. It has been in a steep decline for 30 years. Gender distribution is around 51.4% female and 48,6% male. Distribution by age groups sees a small increase in the last 5 years for 0-14 year old from 13,4% to 14,1%, 15-24 have declined from 11,9% to 9,3%, 25-54 years group is steady around 42%, 55-64 years around 14%, and over 65 is increasing from 17,7% to 20,7%.

The population density of Bulgaria is average of 65 people per square kilometre. Most of the people however live in urban areas (74,7%) with Sofia being the most populated city with 1,277,000 people. The next largest cities are Plovdiv (340.5 thousand), Varna (312.8 thousand) and Burgas (195.9 thousand). With the first situated in the Thracian Plain with intensive agricultural and industrial development, and the last two situated on the Black Sea.

The GDP of Bulgaria for 2018 is 50,553.12 million Euro, or 8,274.7 Euro per capita, which equals to Purchasing Power Standard for EU of 49, which is the lowest for all EU countries. The economy however has been growing the last 5 years starting from 2% in 2014 to a little over 4% in 2017 and around 3,25% in 2018.

Economic Performance of Bulgaria

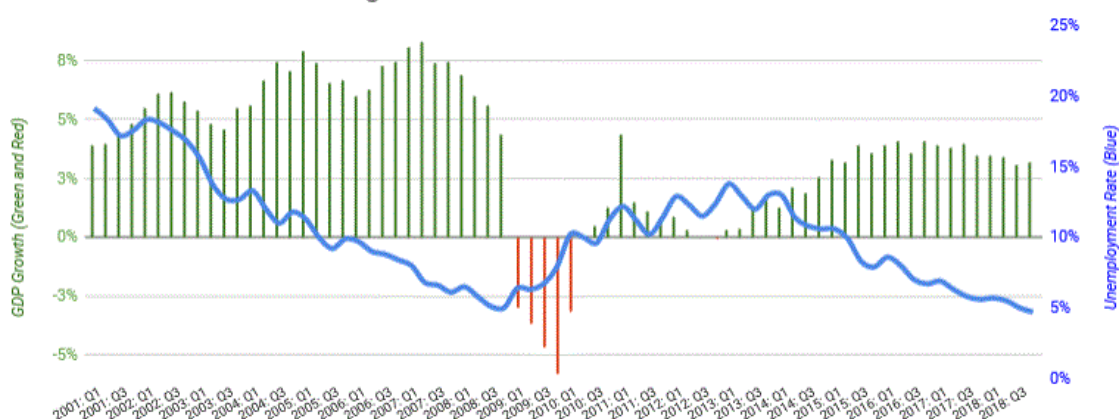


Figure 2. GDP and Unemployment Rate of Bulgaria by Cryout at the English Wikipedia [CC BY-SA 3.0 (<http://creativecommons.org/licenses/by-sa/3.0/>)]

The official language of the country is Bulgarian which uses the Cyrillic alphabet, developed specially for it in the end of the IX, beginning of the X century. However all students study at least one EU official language, mainly English, and starting from 8th grade a second foreign language, depending on the school and the choice of the students. Many parents decide to start educating their children in a foreign language from kindergarten.

The political system of the Republic of Bulgaria is parliamentary representative democratic republic, with a National Assembly, consisting of 240 representatives, which are elected in a multi-party election. The parliament (National Assembly) exercises the legislative power, the Prime Minister and the Ministers hold the Executive power and the Judiciary is independent with its own Supreme Judicial Council, consisting of 25 members, elected among the legal practitioners with at least 15 years of practice.

The official date of Independence of Bulgaria is 22 September 1908, when the then prince Ferdinand of Bulgaria declared the independence of the country from the Ottoman Empire and took the title of Tsar. However the National Holiday of Bulgaria is currently celebrated on the 3 of March, the date of the signing of the San Stefano Treaty, which signifies the end of the Russia-Turkey war and the liberation of Bulgaria from the Ottoman Empire.

In 2007 Bulgaria joined the EU as full member following an application in the end of 1995. Joining the EU also introduced Cyrillic as the third official alphabet to be used together with Latin and Greek. The seats that are allocated to Bulgaria in the European Parliament are 17, and at the moment are divided to 7 for representatives of EPP, 4 each for ALDE and PES, and 3 for ECR.

The official currency of the country is the Bulgarian Lev (BGN) with fixed rate to the Euro with 1 EUR = 1.95583 BGN. It is expected for Bulgaria to switch to Euro in 2022.

Bulgaria is not a member of the Schengen area, although the European Parliament has voted in favour of the inclusion in the end of 2018 and it should be a fact before the end of 2019.

b) Characteristics of the overall labour market

Following the decrease of the population, there is a decrease in the total active population from 3 427 600 to 3 264 000 in the period from 2010 to 2016. However, the total number of unemployed people decreases both in numbers, as well as in terms of unemployment rate from 13,2% in the end of 2013 to 4,7% in the beginning of 2019.

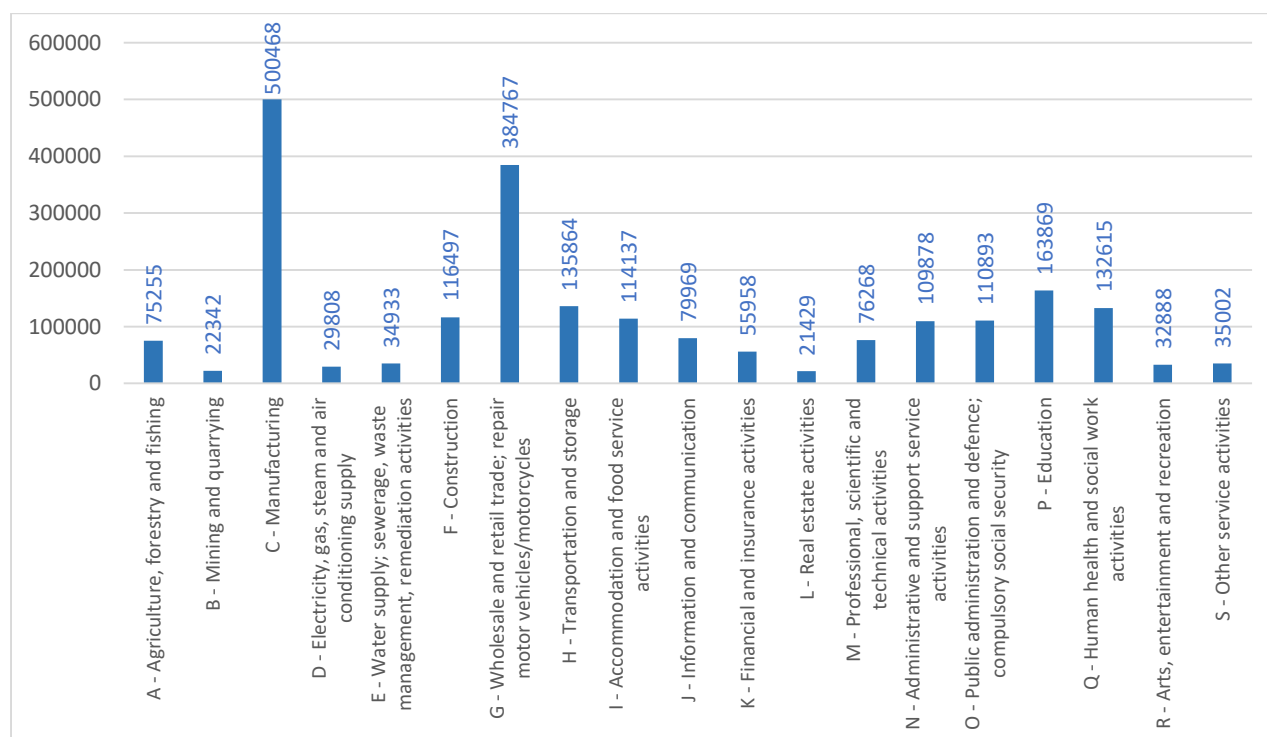
	TOTAL ACTIVE POPULATION	TOTAL UNEMPLOYED PERSONS	TOTAL EMPLOYED PERSONS	NUMBER OF PERSONS IN EMPLOYMENT					
				BY GENDER (%)		BY AGE (%)			
				Female	Male	15-24	25-54	55-64	65
2018	3326000	173300	3152700	46,54	53,46	4,13	74,62	18,59	2,66
2017	3357200	206900	3150300	46,59	53,41	4,72	74,79	18,05	2,44
2016	3264000	247200	3016800	46,71	53,29	4,42	75,70	17,78	2,07
2015	3337000	305100	3031900	46,98	53,02	4,72	75,90	17,48	1,93
2014	3365900	384500	2981400	47,10	52,90	5,12	75,90	17,15	1,81
2013	3371200	436300	2934900	47,30	52,70	5,60	76,10	16,75	1,55
2012	3344300	410300	2934000	47,45	52,55	6,08	76,30	16,33	1,33
2011	3341400	376200	2965200	47,15	52,85	6,41	76,30	15,99	1,27
2010	3427600	352300	3075300	46,68	53,32	7,12	76,10	15,48	1,25

The distribution of the workforce in terms of gender is opposite to the one in the total population, with men accounting for around 53% and women close to 47%. Age group distribution shows a decline in the 15-24 years group from 7,12 to 4,42 in the period 2010 to 2016. Also, a minor decline for the major group of 25-54 years 76,1% to 75,7%. Respectively the rate of the age groups of 55-64 and 65+ are increasing.

Working Code in Bulgaria establishes a 40-hour working week for full time contracts. The minimum wage is set at 560 BGN (around 286 Euro) per month.

Manufacturing is the sector with the most employed people - around 500 thousand, and second with close to 400 thousand employees is Wholesale and Retail. Third place is for the education with around 164 thousand people employed in it. All sectors show a relatively stable number of employed people with some minor variations in some of the analysed years.

Figure 3. Employment by sectors for 2016





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THE NATIONAL SPORT AND PHYSICAL ACTIVITY SECTOR

3. THE NATIONAL SPORT AND PHYSICAL ACTIVITY SECTOR

a) The Ministry of Youth and Sport of Bulgaria and other Stakeholders

The sport sector in the Republic of Bulgaria is governed by the Ministry of Youth and Sport. There are no other organisations that would encompass the whole breath of the sector. The Bulgarian Olympic Committee however has significant influence over the high-performance sport.

Main duties of the sports minister are the implementation of the government policy, development of the National Strategy for Development of the Physical Activity, Physical Education, Sport, and Sport-Tourism Activities, the respective Programme of that strategy, as well as the means to promote the priority sport activities.

The structure of the ministry is divided to General Administration and Special Administration. The former includes directorates for finances, legal and administrative functions, PR and protocol. The latter includes the directorates for investments and public tenders, sport for all and student sport, high performance sport, coordination of sport preparation, youth activities, etc.

The functions of the Ministry are to observe the activities of the sport organizations and their adherence to the Law for Physical Education and Sport that has been passed by the National Assembly. It issues licenses to the national sport governing bodies, and provides finances for federations and clubs. Together with the Bulgarian Olympic Committee and the National Federations it finances the preparation of the Bulgarian athletes to the Olympics. These finances are provided through the programs “Development of high-performance sport”, “Olympic preparation” and “Development of sport clubs”.

The ministry provides a number of programmes that are open for project proposals by schools, sport clubs, federations and other organisations, for targeted financing, such as “Development of School for Students”, “Sport for Children in Risk”, “Learn to swim”, “Children and the sport club”, “Development of sport for people with disabilities”, “Development of sport for all”, “Sport for children in the free time”.

b) Legal framework of Sport Sector

As already mentioned, main legal framework for the functioning of the sport organizations is the Law for Physical Education and Sport and the corresponding Regulation for Application of the Law for Physical Education and Sport. It provides specific information on the types of sport organizations, their structure, functions and duties. It also deals with sport facilities and provides framework for the operation of publicly owned facilities by the sport organizations, as well as facilities build by other organizations on publicly owned land.

Chapter six provides the framework for implementation of the High-Performance Sport Policy, including regulation on athletes – amateur and professional, by delegating to the respective national federation the development of criteria for the athlete’s statute. Similarly the training, licensing and qualification of sport officials are also duty of the respective federation.

Chapter nine of the Law deals with the Sport-Pedagogy Human Resources, where it is established that the coaches and sport-pedagogy specialists that have completed a major in the field of “Sport” or “Physical Education”, or have been qualified in the professional field of “Sport”. All such specialists have to be registered in the National Register of Sport-Pedagogy Specialists and are the only people that can be hired as coaches or provide sport services.

Further regulation on the requirements for achieving coach qualification is provided by the Regulation 1/04.02.2019 of the Ministry of Youth and Sport. It regulates the occupations of “instructor”, “assistant coach”, “coach”, “senior coach”, and “head coach”. The requirements for the first two are high-school and additional professional training, while for the latter three occupations – University bachelor degree and experience requirements for senior and head coach. However there is a possibility for alternative methods of qualification, as provided in article 11 of the regulation, stating that achieving internationally recognized qualification in the respective sport, which has been established by an international sport organization and is being used in at least 5 other countries, together with certain experience as an athlete, instructor or coach, can allow the individual to be listed in the national register of coaches.

The National Classification of the Professions and Activities provides more detailed information on the types of recognized professions and their required educational level.

Besides the aforementioned, other important laws that have impact on the sport sector are the Law of Non-Profit Entities, as the law that most of the sport organizations operate; the Commercial Law for the private sport sector organizations, the Labour Code which regulates the interactions between employers and employees.








c) National Strategy of Physical Education and Sport

The current National Strategy for Development of the Physical Education and Sport in the Republic of Bulgaria 2012-2022 has been adopted by the National Assembly in November 2011. Main strategic aim of the document is *the establishment of the physical education, sport, and social tourism as means to improve the health and physical abilities of the population, maximum involvement of the population in organised sport for all from different social groups, as well as elevating the sport prestige of the nation on global level.*

The strategy envisions two sub-aims: modernization of the sport infrastructure and improvement of the National System for Physical Education and Sport. In terms of Finances, the strategy envisions by 2022 the sport to be 0,5% of the GDP.

Together with the strategy, at the moment there is an active National Programme for Development of the Physical Education and Sport 2018-2020. It's vision is to establish and develop a functioning system for Physical Education and Sport in the Republic of Bulgaria in order to promote the physical activity and sport participation, as well as sport tourism, of the public as a factor of achieving a significant social effect, and in the meantime support the development of the high performance sport and elevating the sport prestige of the nation.

The operational goals of the program are:

-  Development of the youth sport, and physical activity and sport in the preschool, secondary and higher education system;
-  Establishment of the Secondary Sport Schools as institutions for preparation of high-performance sport reserve;
-  Scientific and medical provision of sports;
-  Development of the high-performance sports;
-  Development of the sport for all;
-  Improvement of the sport facilities in the schools and the multifunctional sport facilities;
-  Combating the use of doping.

The importance of the sport sector has been also recognized in the National Strategy of Health 2020, where sport has been cited as an important part of the healthy and wholesome upbringing of the children, its beneficial effects on rehabilitation, and its necessity for prevention of diseases and improving of the wellbeing of the population.

d) Funding of sport in Bulgaria

As already mentioned, main source of finances for the high-performance sport and sport for all comes from the National Budget and is distributed through the Ministry of Youth and Sport. The budget of the Ministry for 2018 has been 75 732 000 BGN (38,69 million EUR) and is largely provided by the income of the Bulgarian Sport Totalizator, which is the state-owned lottery operator.

The high-performance sport has been awarded the largest amount – 67% of the whole budget. The school sport and sport for all has been funded with 22% of the budget, or 8 361 667 EUR. There were only 1 682 048 EUR for Sport Facilities. However, these would be aimed mainly on facilities that are National government property.

For many public sport organizations and facilities, the local governments are the other main source of finances. Every municipality has their own budget for development of sport and supporting the facilities, which are municipality property. However, the amounts, percentages and structure of spending are different as they are decided by the local councils.

The other sources of sport funding are regulated in the Law of Physical Education and Sport, as well as listed in the Strategy. They include funds from proprietary activities, such as participation in events, transfer of athletes, provision of sport services, etc., as well as funding through the private sector by sponsorship, advertising rights, etc.

e) Economic impact of Sport in Bulgaria

Unfortunately, the economic impact of sport is not analysed in detail by the national statistics. It is included among other activities in the group of *“Culture, Sport and Entertainment; Other Activities; Activities of the Households; Activities of Extraterritorial organizations and bodies”*. The whole group is fluctuating around 2% of the GDP of Bulgaria.

f) Organisation of the sport sector in Bulgaria

The sport sector consists of three main groups of organizations: government organizations and institutions; public non-profit organizations; private commercial organizations. There are some organizations, that are considered special statute organizations because of their important role in the sector, but generally they will be registered as non-profit.

On national level the government organizations include the aforementioned Ministry of Youth and Sport. Its role and activities have been examined. Other national government organizations that are dealing with the sport sector in the executive power are several other ministries, such as the Ministry of Internal Affairs and Ministry of Defence, which are responsible for the applied sport preparation of police, military and firemen. They also provide support for sport participation and competitions for people, that are part of these professions. Same goes for the Ministry of Labour and the workforce sports.

In the legislative power structures, there is a parliamentary commission that deals with the sport sector, together with the children and youth matters. It consists of 19 members of the parliament. Its responsibilities

are to review and suggest changes to the law of physical education and sport in order to provide clearer and more structured framework of interaction between the entities.

There is no special body for dealing with sport matters in the judiciary system. There is a Bulgarian Arbitrary Court in Sports, but it is part of the structure of the Bulgarian Olympic Committee.

On local level the municipalities will develop sport according to the decisions of their councils and will manage and support local clubs, sport facilities and activities for the local population. These will be implemented by their own directorate dealing with sport. Big municipalities will have more focused directorates, usually paired with tourism, integration and youth. Smaller could have just one expert dealing with the matter. The municipalities are providing support for local non-profit clubs, as well as managing local sport facilities.

Most of the organized sports is dominated by the non-profit organizations. There are currently around 5200 non-profit sport clubs, members of one of the over 100 federations in different sports, which are also registered as non-profit public bodies. Non-profit bodies require at least three members, that would govern the organization, but for the most part sports clubs in organized sport are registered as public benefit non-profits, that require at least 7 founding members in terms of natural persons. For the most part clubs are the sport providers both for elite athletes and amateurs, and there is a tendency to shift towards youth sport and sport for children, as it provides easier access to funding from training fees, as opposed to the limited and burdened with administration public funding through the ministry and the federations.

For a federation to be licensed and be eligible for public funding, it has to have at least 7 sport club members in at least 3 of the administrative provinces of the country. It also needs to be a member of the international federation, among other administration requirements. Federations are responsible mainly for administration of the registered athletes, event organization, facilities management, technical officials training and support, etc.

The private sector is the hardest to be analysed. There is no official information on total number of commercial fitness clubs and sport centres. Through contacting different suppliers of nutritional products and fitness equipment we estimated a minimum amount of about 600 commercial fitness centres and clubs. This number could double if we include grey sector and other sport providers, that are registered as other business types, such as tourism and accommodation providers, that would sometimes include sport services as a secondary product. Most of those would be concentrated in the biggest cities and tourism centres of the country. There is no statistical data on registered fitness and sport club members.

g) Participation in sports

Besides the Eurostat surveys, there are no representative studies to reveal the physical activity of the Bulgarian population. According to the 2017 Special Eurobarometer 472 on Sport and Physical Activity 68% of the Bulgarians are not participating in sports or exercising. However, this is 10 pp lower than the 2013 study and there is a positive tendency of sport participation. Of those, that are active, only 2% are regularly practicing, 14% declare exercising with some regularity, and 15% are seldomly engaged in sport and physical activity.

Data on other physical activities, such as biking, dancing, gardening, etc. shows regular engagement for 7% of Bulgarians, 20% with some regularity, 26% - seldom, and 45% do not engage in such activities. Again, there is a positive trend for the active population as there are 6pp drop in the last group from 51% in 2013 to 45% in 2017.

In terms of regularity 9% of the active population declares practicing 4 to 7 days a week, and 22% 1 to 3 days a week.

The subjects, that have declared being vigorously active in the last week, have reported also the duration of the activity. Largest part of the respondents with 38% exercise between 31 and 60 minutes. As a whole 51% exercise less than one hour and 45% - over 60 minutes. The missing 4% are people who don't exercise (1%) or not responding.

Most of the respondents from Bulgaria declare, that they prefer to exercise at home (49%). Second place with 26% is for outdoor areas, parks, etc. Another 20% are practicing on the way between home, work or shops, 15% at work, and 14% at a health or fitness center. Only 4% are engaging in sport centers, and 5% at sport clubs.

Health and fitness centers are revealed as the preferred membership for Bulgarians, with 5% of the respondents. Sport clubs have 2%, same as socio-cultural clubs that have the same percentage of the subjects as members. The mass of 84% are declaring that they are not members, and exercising and sports are spontaneous. Health and fitness clubs present an increase of 3pp from the last Special Eurobarometer in 2013.

In terms of motivation most of the Bulgarian respondents show health benefits with 31%. Next 24% are for relaxation, and 22% each for improvement of fitness and control of weight. Social interactions such as making new acquaintances, better social integration and meeting new people from other cultures, are at the lowest of the responds.

In terms of barriers, the respondents as a whole for the EU show lack of time, which is true for 41% of the Bulgarian respondents. Another 28% have no motivation or interests, and 19% are unable due to illness or disability.

In terms of access to sport, only 30% of the Bulgarian responders say that the area where they live offers many opportunities for being physically active. Similarly for the local sport clubs, only 33% of Bulgarians are considering the options that the clubs present for being active, to be sufficient.

In terms of evaluating the policy 44% of the respondents are considering that the local authorities are not doing enough to promote physical activity among the population.

h) Professional Sports in Bulgaria

According to the Law of Physical Education and Sport, a Professional Athlete is one that has training and competition as its main profession and receive remuneration for their activity. Such professional status should be defined by a special regulation of each federation.

Currently the sports with the largest part of professional athletes are Football, Volleyball and Basketball. Athletes from other sports that have high achievements are also treated as professionals and are state supported. Such sports are Wrestling, Boxing, Artistic Gymnastics, etc.

There are also seldom cases of athletes with civil contracts or semi-professional statute in non-profit clubs from all sports.

i) Sport Facilities in Bulgaria

In the Register of Sport Facilities of the Ministry of Youth and Sport there are 1000 entries of different facilities. However, this information can only be used for approximation, as the register is not complete, and it also includes administrative buildings.

There are three main types of ownership of the sport facilities in Bulgaria. National Sport Facilities are state owned and managed by two government owned commercial entities – The National Sport Base Company and the Academica 2011 Company.

The majority of sport facilities are owned by municipalities and are operated through concession deals or rented to local sport clubs to manage. Some larger municipalities have established commercial entities to control some of their sport facilities, i.e. Sportna Sofia 2000 Company, which is owned by the Sofia municipality and manages the sport facilities in public parks and recreation areas of the capital city. As a heritage from the socialist government before 1989, there is a stadium in almost every city and large village in Bulgaria, but most of them are not being taken care of and many are unusable and dangerous.

There are also a number of privately-owned facilities, which mainly consist of fitness halls, swimming pools, football and tennis fields, which are rented to amateur teams and athletes for recreational sport. These however are only in the large cities where they could attract customers.



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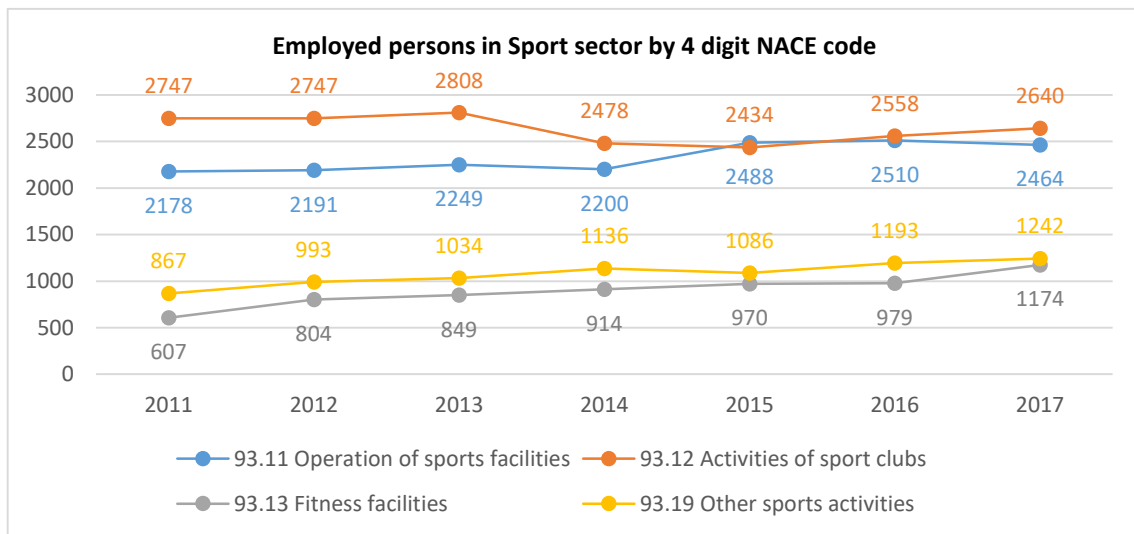
4

SPORT LABOUR MARKET STATISTICS

4. SPORT LABOUR MARKET STATISTICS

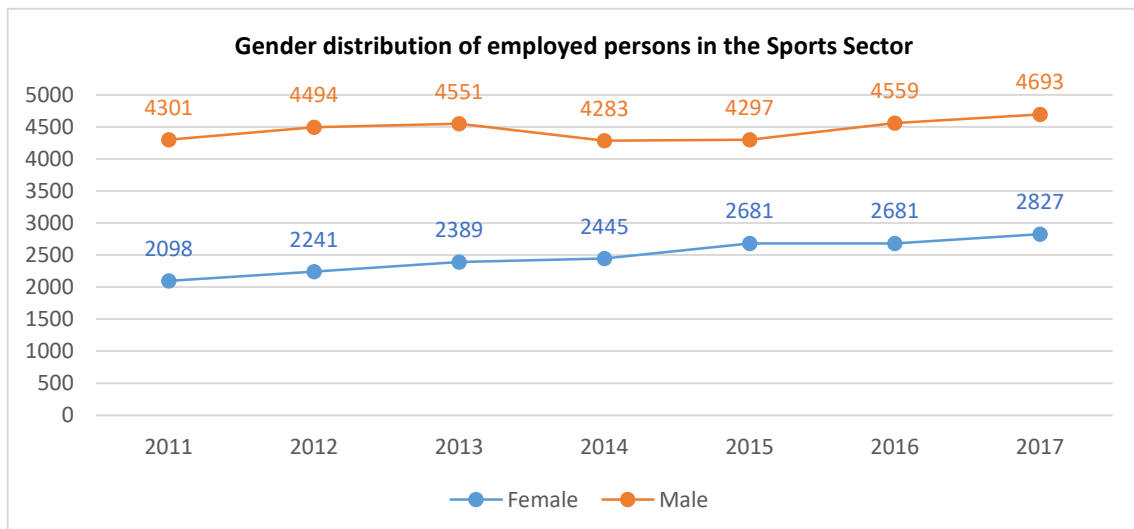
The statistics on the sport labour market have been collated by the information provided by the National Statistical Institute of Bulgaria (NSI) and through Eurostat. Attempts have been made to gather information from other sources, such as the Ministry of Youth and Sport, National Social Security Institute, National Commercial and Non-Profit Register, but either there was no data, or it was not deemed objective.

According to the data, provided by the Labour Survey of the NSI there is a small trend of increase of the people, engaged in the 93.1 Sport Activities sector, from 6399 in 2011 to 7520 in 2017. Looking at the 4 digit level, we can see that despite this increase, there is a fall in the people engaged with the activities of sport clubs, that had a steep drop in 2013/14. Most increase of over 560 new employees is in the Fitness facilities operation, 375 for other sport activities, and 286 for the sport facilities operation.



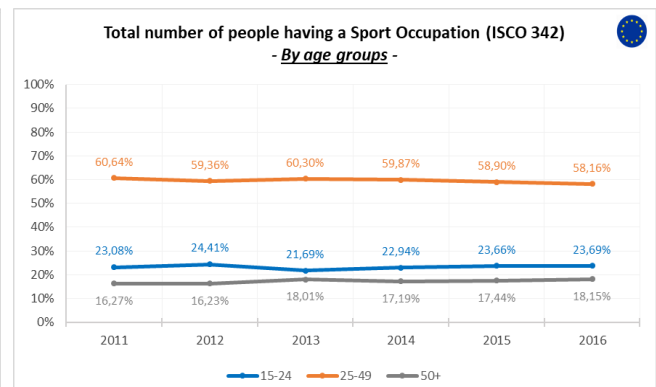
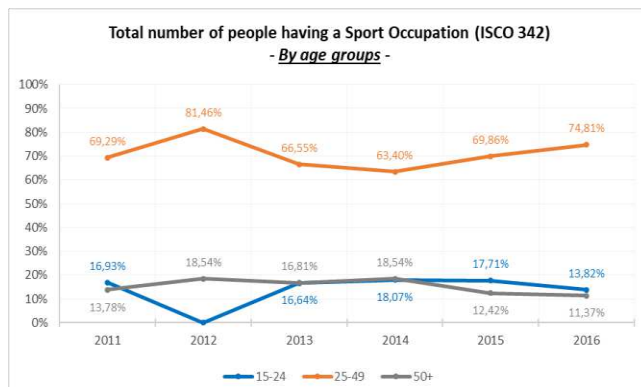
In the 85.51 Sports and recreation education, there is a drop from 2011 to 2015 from 241 to 81, and since then there is again slow increase to 119 in 2017.

Considering the sex differentiation, we can see that as a whole there is a small tendency towards closing the employment gap. In 2011 the male employees in 93.1 sector were 67,21% to 32,79% females. In 2017 there is 5pp shift towards females, and the data shows 62,41% males and 37,59 females. Interestingly, employees in fitness facilities tend to be 60% female. This is probably because of the administrative positions which are typically filled by female staff.



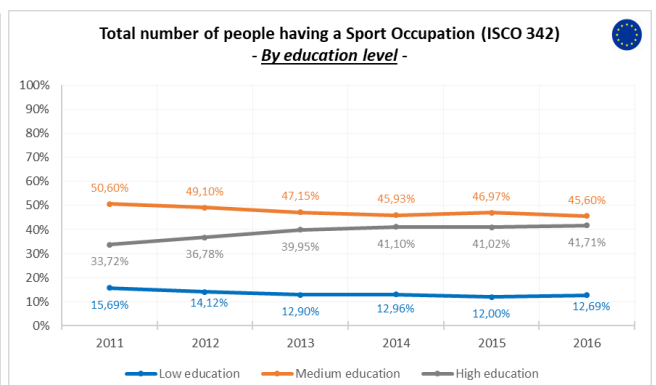
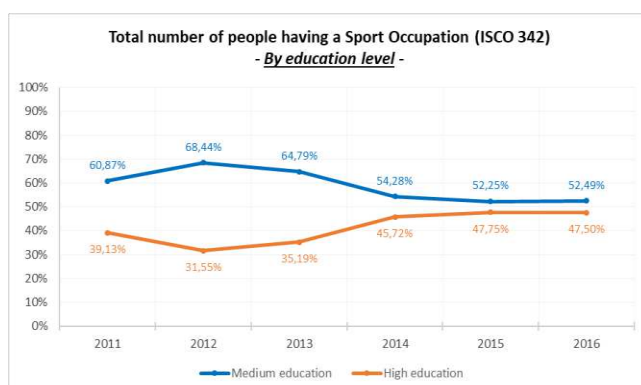
Considering the European statistics, the growth of the sector is a bit slower in Bulgaria, than in Europe. However, the official statistics have limitations and it is reasonable to think that the sector is underrepresented both on EU level and locally. Some particular conditions in Bulgaria however allow for a large part of the sector to go unnoticed. There is a considerable amount of people that are engaged in delivering sport in their free time in informal settings. Many fitness instructors, coaches in certain types of sport are in the grey economy, delivering training without being registered with authorities.

Information about people, that have sport occupations according to ISCO 342 is a bit more detailed. Looking at it we can see that when divided in age groups, we can see that people in prime working age 25-49 years are higher percentage in Bulgaria, than in the EU. The percentages of people aged 15-24 and over 50 years are lower in Bulgaria than the average in the EU.



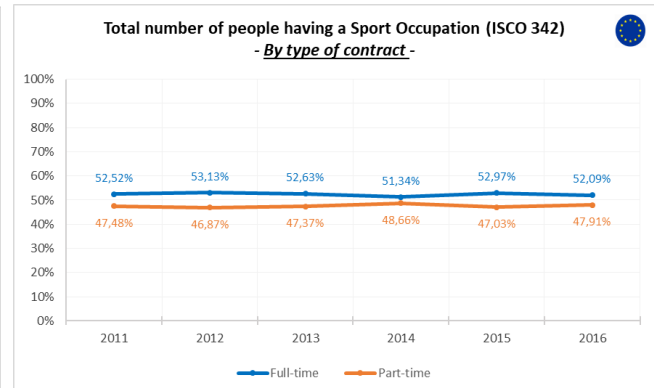
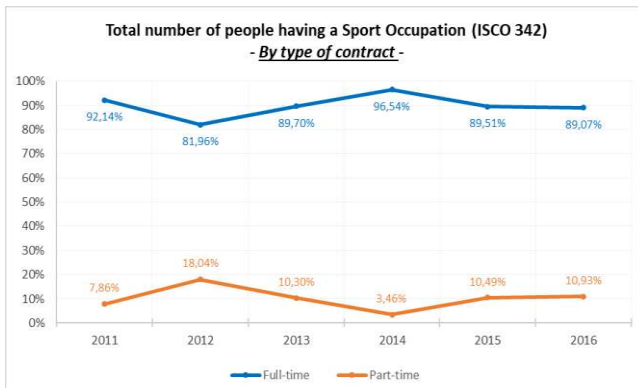
This can be explained with some of the regulation in the sector, that would require obligatory bachelor degree for many of the positions, such as coach and head coach, fitness instructor, sports manager, etc. These requirements' side effect is limiting the age at which people can obtain a sport occupation. There are some positions, that are available with a specialist diploma, obtained from a specialized high-school or a college, like assistant coach, assistant fitness instructor, event organizer, etc., but there aren't many sport organizations that would include such position.

Same requirements are evident, when we look at the education level of people with sport occupations. There aren't any people, having a sport occupation, detected by the statistics with low education in Bulgaria, and the percentages between medium and high education are quite close, with high education being just 5 percentage points lower than the medium.

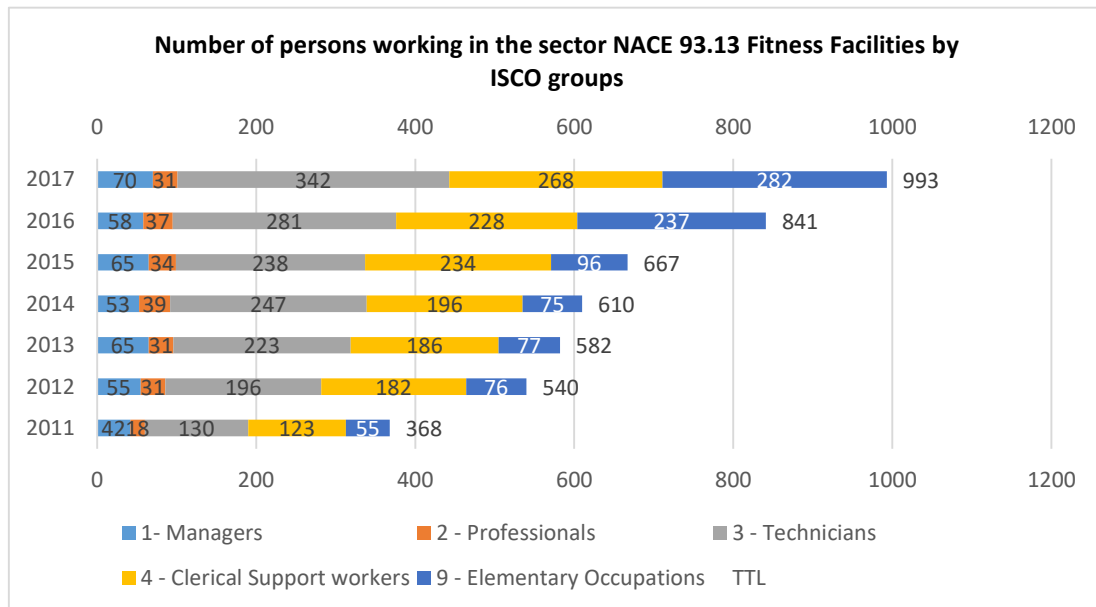


Employment by type of contract between is another aspect, where there is a significant difference. While the percentages for the EU are quite close – around 52% for full-time and 48% for part time, for Bulgaria it is a clear huge advantage for the full-time contract workers. There are several reasons that can explain this difference – part-time work is not common at all in sports, many part-time working personnel does not have

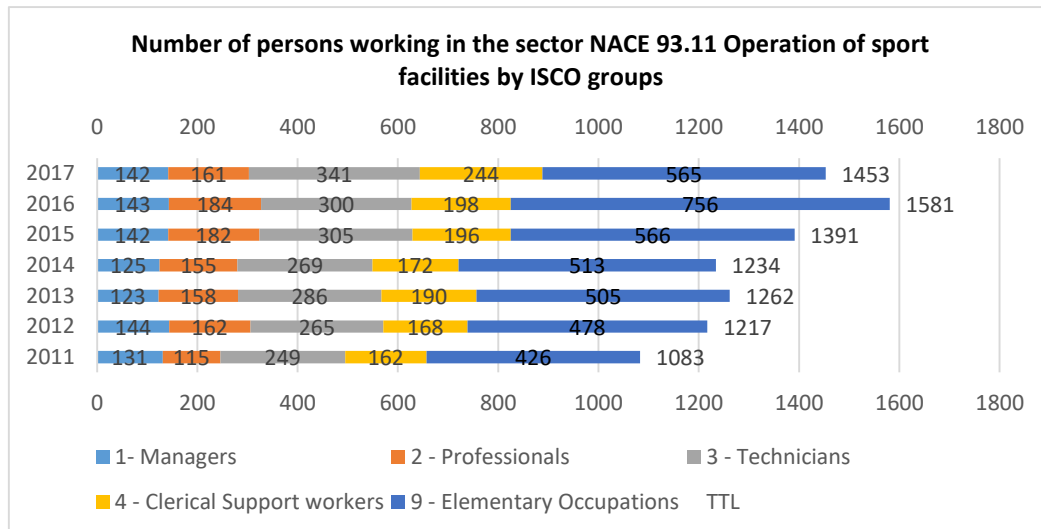
a contract at all, and many organizations, especially non-profit, benefit from the voluntary work of their members, which are not linked by a working contract.



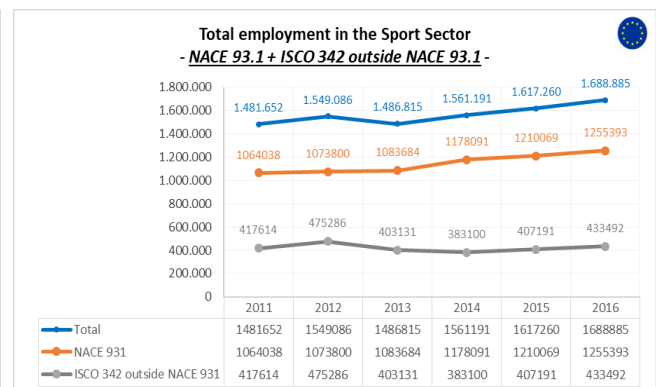
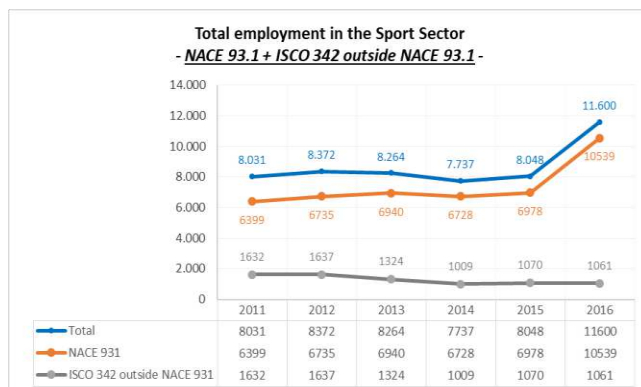
When looking at crosstabulation of the NACE codes by ISCO groups, it is evident, that the biggest gain is in fitness facilities. The increase of occupation at this NACE code is distributed among the 5 observed ISCO groups with biggest increase of the group 9 - elementary occupations, especially last two years, as well as in 4- clerical support and 3 - technicians. This shows a clear tendency of a growth in the fitness industry.



The other NACE code that shows increase is 93.11. Operation of Sport facilities. It is evident, that the Managers ISCO group doesn't change much, and the biggest increase is again for groups 9 – elementary occupations, 3 – Technicians, and 4 – clerical support workers.

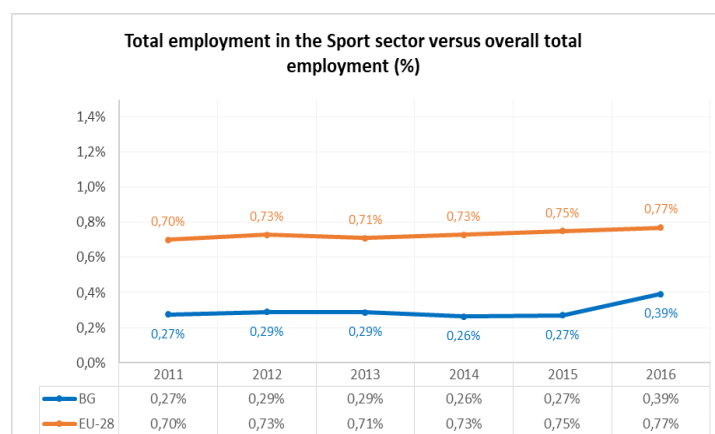


The whole breadth of the sector is evident, if we collate the number of people employed in the Sport Sector by NACE code 93.1 and the people, having a Sport Occupation by ISCO 342.



Again, comparing Bulgaria to EU, we can see that the percentage of people with sport occupations outside of NACE 93.1 is lower. However, this might not be the real world scenario, as many people, delivering sport, are formally appointed to other positions, for administrative or other reasons, such as bending the law, not to require a specific education, etc.

Same problem can explain the difference between the average percentage of the total employment in the sector vs the overall total employment. Comparing the data, it appears as Bulgarian sport sector employment as a percentage is half of the EU average. However, it was mentioned several times that there is a lot of grey economy in the sector, as well as purposeful mislabelling of positions, that would hide the real significance of the sport sector.



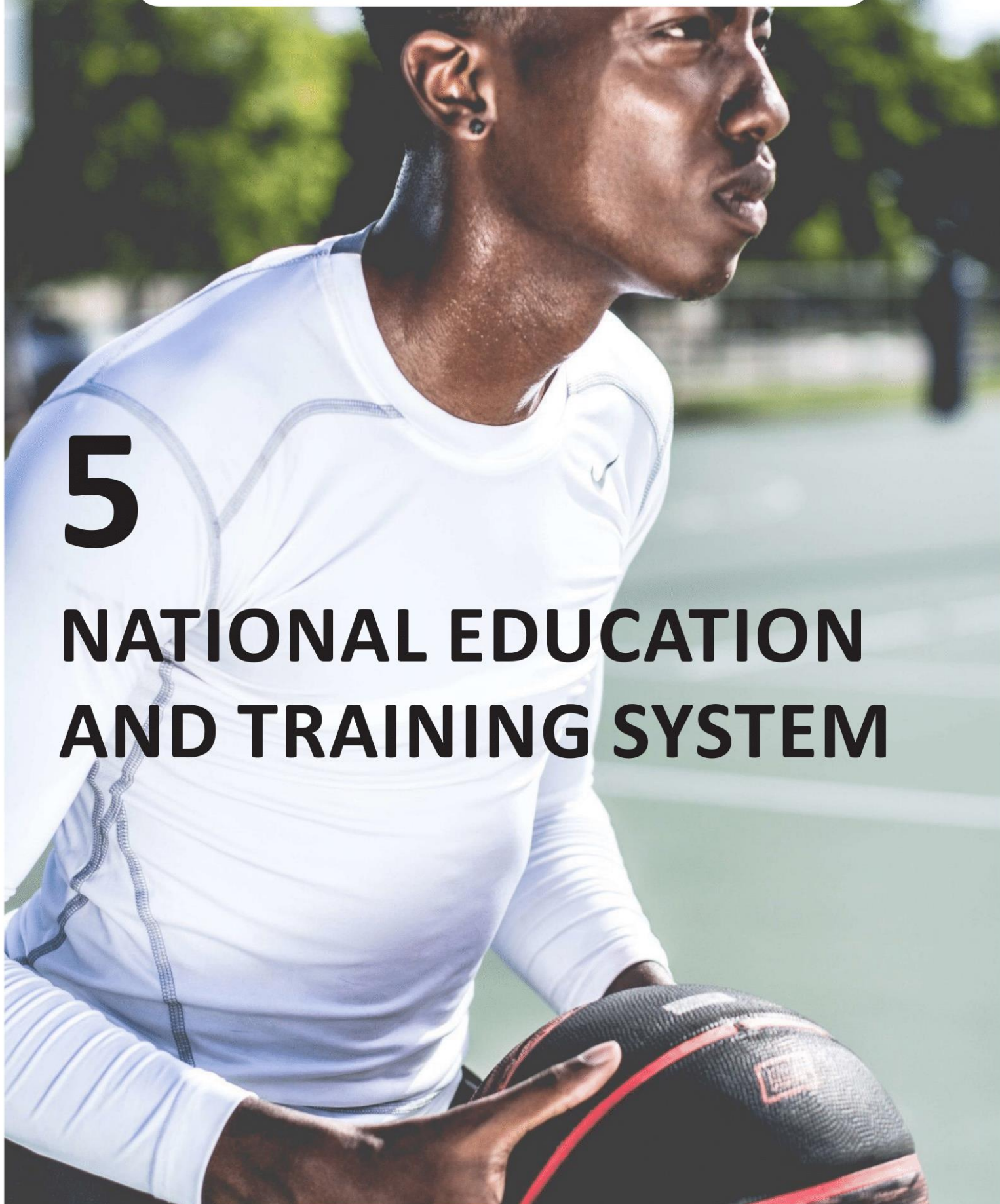


ESSA-SPORT

Improving the Supply of Skills to the Sector

5

NATIONAL EDUCATION AND TRAINING SYSTEM



5. NATIONAL EDUCATION AND TRAINING SYSTEM

a) National Education and Training Governing Bodies

The current structure of the government of Bulgaria delegates the education and training under the responsibilities of the Ministry of Education and Science (www.mon.bg). The Ministry exercises the executive power over the general education, the vocational education and training, the higher education and the science development in Bulgaria. Its directorates are responsible for the production and update of the educational programs for general education.

The National Agency for Vocational Education and Training (NAVET) is responsible for observing the vocational education and training. It is a body directly under the control of the Council of Ministers of Bulgaria.

The National Evaluation and Accreditation Agency (NEAA) is also a government body of the Council of Ministers of Bulgaria, that is concerned with the evaluation and accreditation of the higher education programs and providers.

b) The Structure of the National Education System

The education in Bulgaria is provided by public and private kindergartens, schools and universities.

Preschool education is provided by kindergartens. It starts as early as two years old (provided that the child has completed two years of age before the beginning of the school year in September). The compulsory preschool education starts from the age of 5 (the child should enter in a preschool education institution in the same year it completes 5 years of age).

The general education is compulsory and includes pupils from the age of 7 (or 6 years, if the child has completed 6 years before the start of the school year) until the age of 19 or 20 years, depending if they receive vocational training.

Higher education is not compulsory. The lower tier are the colleges, providing 3 years of training for a professional bachelor degree, as well as VET programs. The higher tier are the universities and specialized higher schools, providing full bachelor (4 years of education and training), master (a total of 5 years after high school completion) and doctor (3 years after completing masters, also provided by science institutions) programs.

c) Higher Education System

The current Law for Higher Education has been established in 1995 and has been updated numerous times, last on 9th of December 2016. It has 12 chapters. According to it the types of higher education institutions are the public and private higher schools (universities). The current ratio between them is 11 privates to 35 public. Colleges are not included in the higher education institutions, but in the vocational education and training system.

The cost of the subsidized higher education is approved by the Council of Ministers based on the propositions of the Academic Councils of the respective public state universities. The students have to pay part of their education with fees that vary between €100 and €800 per year, depending on the University, the Professional Area, and the inclusion of additional specialized training (i.e. aviation, heavy machinery, etc.). These fees are valid for a predefined number of students, ranked by their results on the entry examinations. The state universities can also accept students that are on fully paid subscription, which can be 4 to 5 times higher. Fees

in private universities are close to the fees of the fully paid subscription and are decided by the Academic Council of the respective university.

d) Vocational Education and Training system

The system for VET in Bulgaria is under the responsibilities of the Ministry of Education and Science and the National Agency for Vocational Education and Training. The programs for VET are provided by Universities, Colleges, Centres for VET and High schools with Vocational training.

The professional colleges, public colleges, high schools with vocational training and the VET centres can provide professional qualification license to their students. Universities may provide VET to people with professional bachelor degree or high school degree with vocational training only for the same professional qualification, or provide new qualification for students that have obtained at least a bachelor degree.

e) Quality Assurance and Accreditation in the Educational System

The quality assurance in the preschool and general education is provided by 28 regional centres of the Ministry of Education and Science, according to the National Educational Requirements and the developed programs for the education up until the completion of High School.

The vocational education and training providers are monitored by the National Agency for Vocational Education and Training and is provided according to developed national programs for VET in each profession of the National Register of Professions and Occupations in Bulgaria and their required educational level. The NAVET issues and revokes licenses for VET and provides control of the provided trainings.

The educational programs in the higher education are developed by the respective faculties (bachelor), program councils (masters, PhD, DSc) of the universities and are evaluated and accredited by the National Evaluation and Accreditation Agency.

f) NQF and EQF reference

The NQF encompasses 9 levels, starting with level 0. Levels 1 through 8 correspond to the EQF. The level 0 of the NQF is preschool education that is provided in public and private kindergartens. Levels 1 through 4 are provided in public and private schools for grades 1 to 12 or around 19 years of age. Level 5 is for professional education in colleges as well as for students that received vocational training in their high school. Level 6 is for professional and full bachelor degrees provided from colleges and universities. Level 7 is for achieving master degree from an university and level 8 – PhD graduates from universities or scientific institutions.

g) Apprenticeship, Internship and Mentoring regulation in Bulgaria

The apprenticeship system in Bulgaria has been addressed in the Law for Craft Trades, Law for Employment Promotion, the Law for Vocational Education and Training, and a few other regulation documents with minor significance. The texts in these laws distinguish between internship, apprenticeship and mentoring. Internship is recognized as a practical work in a specific position in order to increase the qualification and experience of the intern by a structured model for adopting new knowledge, skills and work habits. Apprenticeship is defined as the sequential work on a specific position, followed in turns by education in an institution. Mentorship is understood as a process of transfer of knowledge and skills from a mentor – someone who is more experienced and skilful, to the mentee – the person, who is looking to obtain these skills and knowledge.

There are opportunities to obtain public funding for providing opportunities for internships, apprenticeships and mentoring. Such measures are introduced in the Law for Employment Promotion for hiring underqualified

people of age 29 and under, on an apprenticeship position. Such funding is also provided by the Schemes in the OP „Human Resource Development“, namely „New Beginning“ – Young people of 29 and younger to begin paid internships on a position, relative to their education; „Student Internships“ – for students in the general and higher education to be included in two month internships according to their profile of education; „Employment Support“ – for persons of risk groups, namely people, unemployed for over 12 months; unqualified or under skilled unemployed persons; uneducated unemployed persons; unemployed persons from ethnical minorities.

There are also singular cases of proprietary apprenticeship programs, funded by the private sector.

h) Informal and non-formal learning

The recognition of informal and non-formal learning has been included in the Bulgarian legislative system in the Law for Vocational Education and Training, the Law for Preschool and School Education, the Law for Employment Promotion, and in Regulation 2/13.11.14 of the Ministry of Education and Science for the Conditions and Procedure of Validating the Professional Knowledge, Skills and Competencies. According to the last, the institutions that can provide validation of such learning are the professional schools and high schools, art and sport schools, professional colleges, and centres for professional learning. They can only provide validating on the same professional qualifications, that they provide or have been providing vocational education and training.



ESSA-SPORT

Improving the Supply of Skills to the Sector

6

NATIONAL SPORT EDUCATION AND TRAINING SYSTEM



6. NATIONAL SPORT EDUCATION AND TRAINING SYSTEM

a) System of Physical Education and Sport

Sport and Physical education are integrated part of the educational system throughout its total duration. The preschool physical education has not been regulated with a defined number of hours, but with the requirements of physical abilities, described in a regulation for the preschool education.

Physical education and sport in schools is compulsory for all the 12 grades, by having at least 2 academic hours (45 minutes) per week of PE and Sport in the first and second grade, then increasing to roughly 2,5 hours per week in grades 3,4,5, and 6, and since 7th grade turning back to 2 hours per week until the 12th grade. The main activities in the classes are based on learning different exercises and activities from foundation sports and games, such as athletics, gymnastics, dances, football, volleyball, basketball, handball, etc.

Physical education and sport in the higher education is compulsory in the duration of 60 hours per year for the students in the bachelor and master programs. Additionally, sport can be provided also as a selective facultative activity. The sports that are provided are decided on by the university with consideration of the propositions of their students' council.

The physical education and sport are provided by PE teachers and coaches. Some schools provide also physical therapy classes for students with special needs, that require a PT specialist. All named professions require at least bachelor level of training. There are 7 public universities, providing education for Bachelor, Master and PhD degrees in the area of Physical Education, Sport, and Public Health (namely Physical Therapy) in Bulgaria.

b) The Role of Federations in the delivery of sport education

Sport federations in high profile sports, such as Football, Ski, Tennis, Volleyball, Basketball, etc. have specific licensing requirements for coaching. Usually there is a cooperation between such federations and the National Sports Academy, by providing entry- or low-level licenses to students that complete the bachelor program in the respective sport. Some of those federations also organize courses and trainings for upgrading licenses of their coaches. The Bulgarian Football Union i.e. has a football academy, that is provided entirely with local lectures, and the Bulgarian Tennis Federation provides courses with international guest lectures. However, most of the organized sport bodies do not have a licensing system and there are a number of sports, where the coaches do not have formal education in the area of sport. This has been an ongoing problem, as there is a Regulation from the Ministry of Youth and Sport, requiring all coaches to have a minimum of Bachelor degree and formal sport education, and Assistant coaches to have a minimum of vocational training certificate and higher education diploma.

Last changes to the Law of Physical Education and Sport, as well as the regulation for public funding of federations and sport clubs have linked the amount of money to the presence of qualified sport coaches, that are contractually linked to the sport clubs.

c) Vocational Education and Training in PE and Sport System

There are 7 private colleges providing training for Professional Bachelor in the professional area of Sport for the positions of Assistant Fitness Instructor, Instructor for Sport and Tourism Activities, Sports Events Organizer, Assistant Coach etc.

There are also 25 specialized sport high schools (6 on government funding, 19 on municipality funding), that provide vocational education for assistant coaches, assistant fitness instructors, organizers of sport events.

It is important to note, that these qualifications usually are not to be performed alone. For assistant coaches and assistant fitness instructors there should be a bachelor coach or a fitness instructor to supervise the activity.

d) Sport Qualifications in the NQF/EQF and CPD

The NQF in sport begins with level 5 for high school graduates from specialized sport schools, with vocational training in the Assistant Fitness Instructor, Instructor for Sport and Tourism Activities, Sports Events Organizer, Assistant Coach professions, level 6 for professional bachelors in the same professions, and for bachelors in sport, physical education, fitness instructors, etc., level 7 includes master programs for coaches, sport managers, and level 8 for PhD in Sport, and Physical Education.

As already mentioned, there are 25 specialized sport high schools that provide NQF/EQF level 5 education. On NQF/EQF level 6 there are 7 private professional colleges, that provide Professional Bachelor degree. The number of enlisted students is not monitored. For persons, that have full bachelor degree there are courses for Vocational Training from university departments (often called Post Graduate Centres) for obtaining new qualification, but there are no private universities providing such programs in sports.

The same Centres for Post Graduate Studies in the universities, mainly the one in the National Sports Academy, provide additional courses for CPD, especially for Physical Education teachers. This is also supported by the requirements for PE teachers to have a certain amount of ECTS obtained periodically in order to be eligible for increase in the salary and other benefits. They are called Professional Qualification Stage, and go from 1 to 5, with each higher stage providing better remuneration for the teacher.

e) Informal non-formal education and training recognition

There is no special system established for the recognition of the informal and non-formal education in sport, and it follows the described system in the general education. The possibilities to provide such recognition of the knowledge and abilities lies with the specialized sport schools and the private professional colleges. It also recognizes “part of a profession” recognition, where part of the curriculum to be fulfilled by the student in order to obtain qualification would be recognized as completed because of the applicant experience and demonstration of knowledge on a specific examination.

f) Training of volunteers

At the moment there is no established program for training volunteers in sport. There are ongoing activities in the National Sport Academy to establish such centre for sport volunteers and there have been several federations stating their support in that activity. Many times, organized sport government bodies have been requesting students from the NSA to act as volunteers in their events, so the need for establishing such centre has been recognized. There have been several in-house projects for sport volunteers in the National Sport Academy, however they did not provide a systematic approach to the volunteering. There is an optional subject in the bachelor student’s curriculum, called “Volunteering”, awarded to students, that have taken part as volunteers in sporting events.

The Bulgarian Sports Development Association also has participated in projects on volunteering and works towards improving the volunteering in sport. However very few of the federations have active volunteering policies and do not work with volunteers systematically, but incidental – only when needed for the organization of a specific event. Also there usually are not much incentives provided for volunteering in such cases.

On the legislative side, there hasn't been much recognition in the laws of volunteering. For several years there has been a discussion for passing a new special law on volunteering, but so far it has not reached the plenary room of the parliament.

g) Qualifications Requirements in PE and Sport

According to the current legislation and regulations the professions of PE Teacher, Coach, Sport manager, Physical Therapist, Fitness Instructor, require at least a full bachelor degree. These are also linked to the respective regulations for the organizations that employ them, i.e. a sport club without a contract with a coach is not eligible to receive public funding.

Professional Bachelor degrees, and High School graduates with vocational training can exercise the professions of Assistant Coach, Assistant Fitness Instructor, Organizer of Sport Events, Instructor of Sport and Tourism Activities. The first two of those would require the supervision of a coach or a fitness instructor with a bachelor degree.

h) Education in other sub-sectors of sport

As already mentioned, Coaching, Managing and administration and Fitness sub-sectors have the same system of education, with providing licenses for assistant coach, organizers of sport events, assistant fitness instructor by specialized sport high schools and professional colleges, and full bachelor diplomas for coaches, sport managers, fitness instructors, by universities.

There is no regulation on officiating and each federation provides its own system for training. There are some federations that have non written agreements with the National Sport Academy to recognize compulsory or optional courses in officiating, provided as a part of the education of the students as a license for officiating. However, most of the federations are having troubles with the management of the officials, especially in recruitment and retainment.

Licenses for mountain guides are obtained by VET trainings. There is also one specialized high-school on mountain guides, which however has some administrative infringements and despite providing a diploma, it is not recognized as qualification at the moment.

Dual career has not been introduced properly in the life of sport organizations, leaving active athletes to solve problems with trainings and education on a case by case basis. There is a lot of confusion in the federations when discussing dual careers, as most of them would consider continuing as a coach to be a dual career.

i) Monitoring the Realization of Sport Specialists and the Labour Market Requirements

The sport qualifications and courses that are providing VET and Higher Education with diplomas, recognized by the state, are included in the registers of VET trainers, and the register of Higher Education Institutions. There is no monitoring for other courses that are not state-approved and accredited.

The matching between the labour market requirements and the provision of training is non-existent in the VET, and is left to the training centres to decide on their own how many people should enrol and qualify as level 5 NQF/EQF. For higher education there is a requirement for the universities to seek input from the employers. However, this is not an objective research on the needs of the market and typically consists of an official letter from a federation, municipality or other sport organization, stating that they are employing a number of sport specialist.

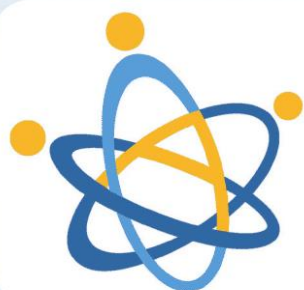
After obtaining the qualifications, there are again requirements only for the higher institution to follow the realization of their students. It affects only publicly funded universities, which have the obligation to monitor the professional realization of their graduates as a part of their evaluation. Each university has its own system going back from three to five years. These results are then cross-checked with the National Social Security Institute and points are awarded to the university, which then affect the funding it will receive for the next year.

j) Current Trends and Challenges in the Sport and Physical Activity Sector Education and Training

There are a couple of challenges, that have been presented to the sport sector.

The first one is the disparity between the needs of the sector and the graduating students. For the last few years there was a fall in the student candidates in the National Sport Academy, which was due to the demographic crisis 18 to 20 years ago. This year there was again an increase. Same can be said for other universities, providing sport education. However, the number of graduating students, even if not researched properly, is evidently higher than the requirements of the sector. This leads to an interest in entrepreneurship from the students, but also to their realization either in the grey sector or transferring to other sectors.

The second challenge is with the new Law of Physical Education and Sport, which allows for coaches to obtain qualification without being subject to an education and training by a university or a college, but by courses, organized by the federation itself. This would lead to increase in the competition for the universities and will render the sport higher education practically useless. In the same time, it is the general understanding of most of the currently active coaches that this will drive knowledge and understanding of sport lower and will lead to decrease in the sport achievements of Bulgarian athletes, which either way have been very low in the last years.



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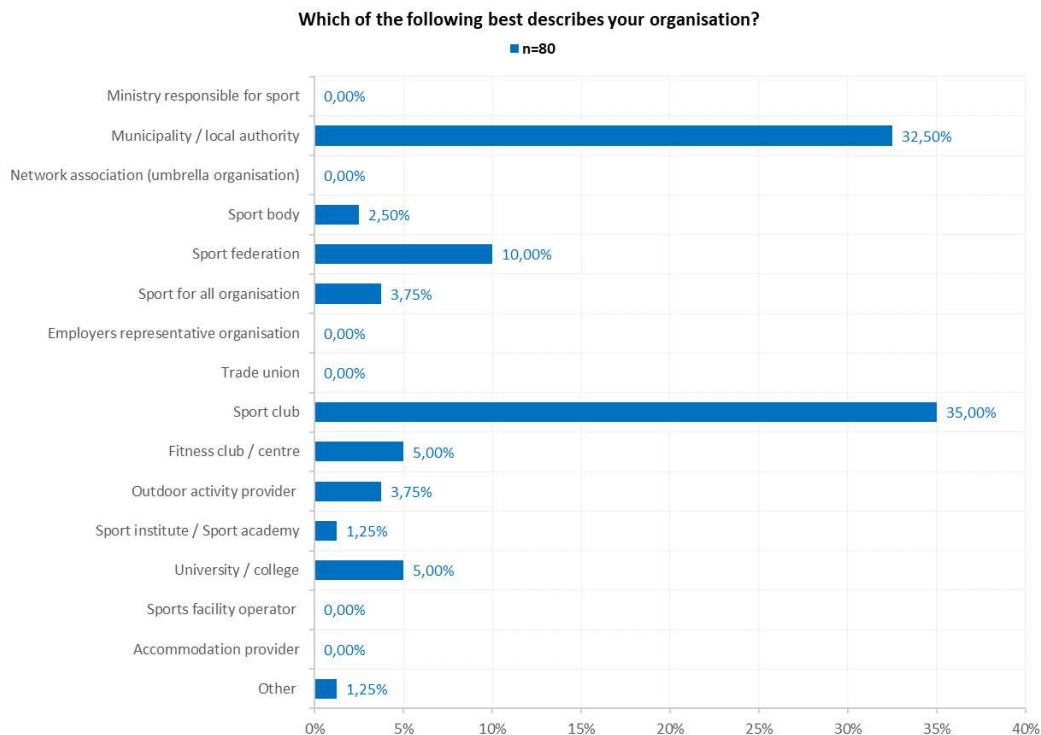
Improving the Supply of Skills to the Sector

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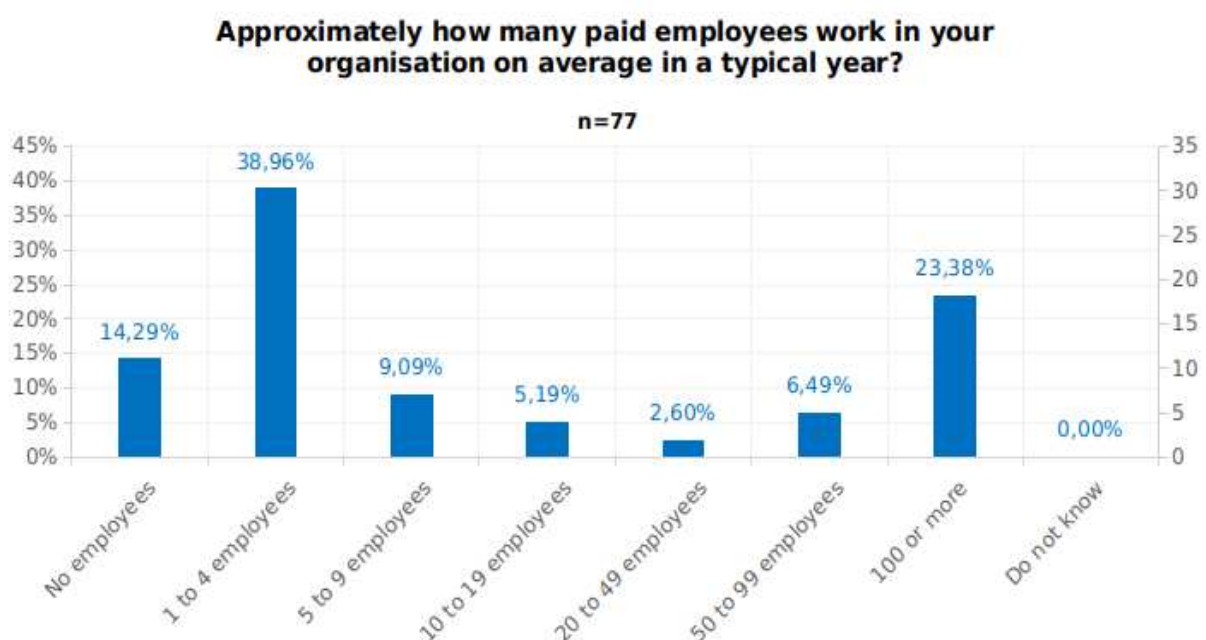
**FINDINGS FROM THE
EMPLOYER SKILLS
SURVEY**

7. FINDINGS FROM THE EMPLOYER SURVEY

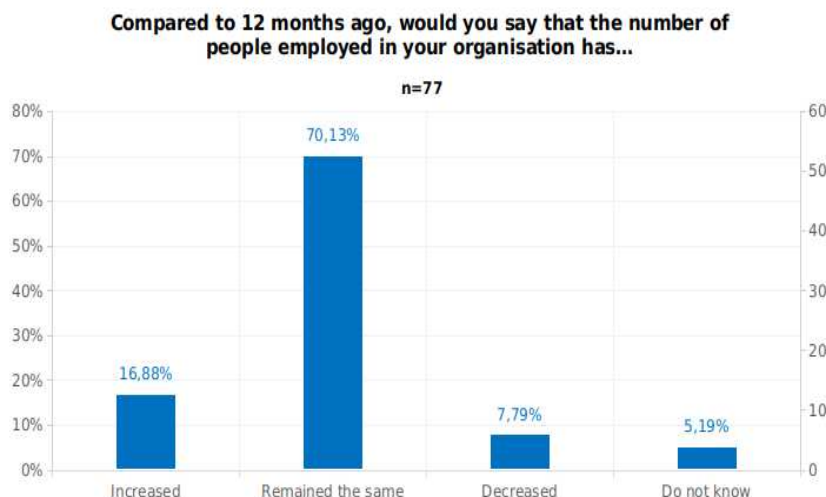
There have been 80 organizations from Bulgaria, that took part in the internet employer survey. The largest part of those were the sports clubs, followed by local municipalities. These two groups significantly outnumber the other types of organizations, that were targeted by the inquiry, which has to be taken in consideration when analysing the rest of the data.



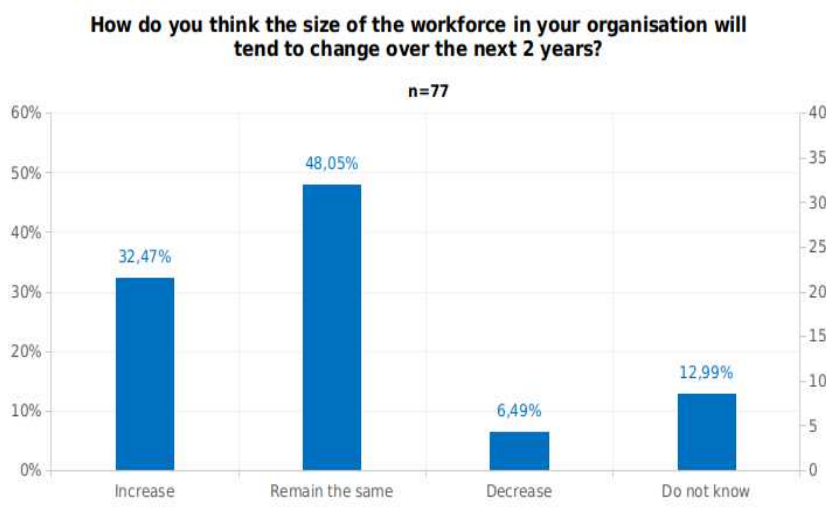
In terms of the magnitude of the organizations, the largest part of 39% report 1 to 4 paid employees, which is typical for smaller federations, and some of the sport clubs. Close to one quarter report over 100 employees, that are expected from the university and from the larger municipalities.



In terms of change of the workforce in the past year, the majority of 70% report that there has been no change in the number of people employed. Close to 17% however report increase of the workforce and around 8% - decrease. This data suggests that there is a growth of some organizations in the sector in the past year. However, it does not detect if there is a growth of the number of organizations, which is more plausible way for developing in the sector, by establishing new sport clubs and sport activity providers.

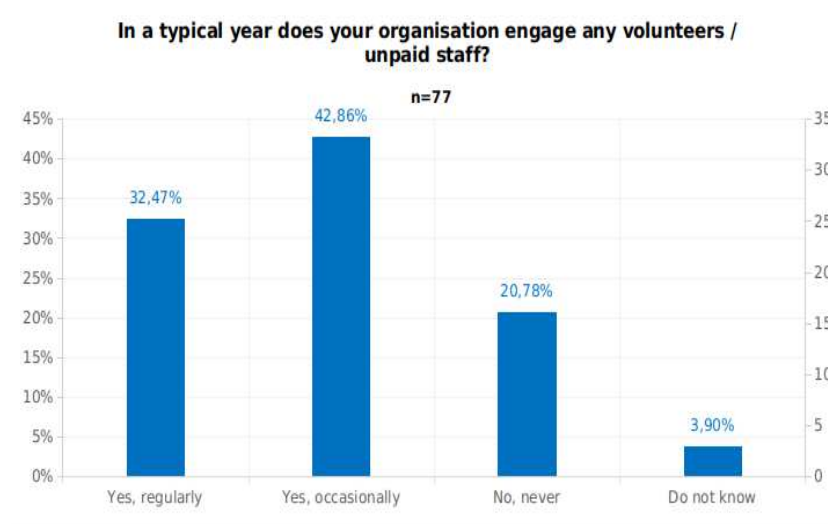


Considering the future there is a significant expectation for many of the organizations to have the need to hire new personnel in the next two years. Although the largest part of 48% do not foresee change, one third of the respondents to this question expect increase in the workforce of their organizations. This shows the optimistic attitude for growth of the sector and an expected increase in the demand for qualified personnel.



When asked about unpaid staff and volunteers, we can see that the majority of the respondents, close to 43% are reporting that they engage such people occasionally. Most of the federations, the Municipalities, and also the clubs, hosting sporting events, would use volunteers for these specific events, which explains the occasional engagement.

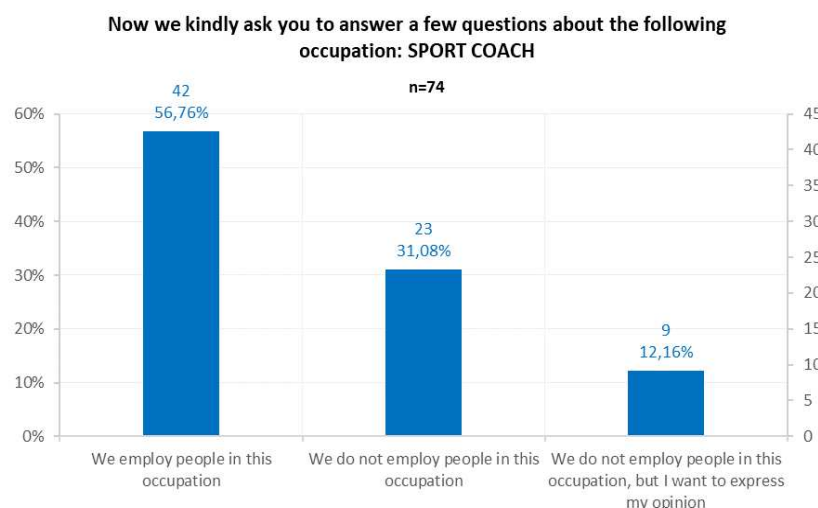
Close to one third are reporting that they regularly work with volunteers and unpaid staff. A certain peculiarity of the Bulgarian sport clubs is, that the majority would be delivering sport through the unpaid or volunteer work of the members of the club. Members would receive informal remuneration, which again shows that the grey sector in sports is not to be overlooked.



Considering the different occupations in the sport sector, the study of the Bulgarian organization should be analysed with caution. The respondents are not a representative excerpt of the sector, and also are not weighted equally. This, combined with the fact that most of the occupations are filled by only a small part of the 80 respondents, provides only an insight to the understanding and the needs of organizations, that have been interested and active enough to partake in the study.

1) Employment and skills of a sport coach

Considering the majority of the respondents are sport clubs, it is no surprise that this occupation has the largest representation. More than half of the respondents – 56,76% have indicated that their organizations employ sport coaches, and other 12,16% do not employ, but wish to express their opinion on the skills.



There are 51 organizations, responding to the question about the required abilities and skills for a Sports Coach. We can notice that the top 5 answers are: Sport specific knowledge and skills; Plan coaching sessions and programmes; Ensure health and safety of participants; Motivational skills, Decision making skills.

The 5 skills evaluated as least necessary for a coach by the Bulgarian survey are: Marketing and selling skills; Information/Communication Technology (ICT) skills; Customer service skills; Ability to work with people with disabilities; Ability to work with different participants.

Comparing to the EU results, there are other skills put forward in the summarized European results, such as Clearly communicate instructions; Demonstrate a duty of care to the athlete/participant; Ability to work in compliance with codes of practice/ethics. However, the skills evaluated as least necessary are the same.

In terms of what are the weakest point of active coaches, the skills evaluated as in most need of improvement, are Ability to work with people with disabilities; Plan coaching sessions and programmes; Ability to work with children; Sport specific knowledge and skills; Ability to work with different participants; Clearly communicate instructions. It turns out that one of the least needed skills is the one in need of most improvement.

Interestingly, there is 43% of respondents, that state volunteer sport coaches should be expected to have the same skills and abilities as paid staff.

2) Employment and Skills of An Outdoor Activity Leader and Animator

Outdoor activity leaders and animators are not well represented in the study, as such organizations are just around 3% of the participants. There are however 7 organizations that employ such professionals and also 5 that are willing to comment on the needed skills, despite not employing this occupation.

The 12 organizations that have responded for this occupation has put as most needed skills the Ability to work with children; Clear communication of instructions; Ensure health and safety; Decision making. Least needed are Planning of the sessions, Marketing and selling skills; ICT; Leadership skills. Main difference with the EU results is that the Abilities to work in compliance with the codes of practice/ethics is again in the top answers, as well as specific knowledge for the sport/activity.

Again, the small number of respondents should caution us that this data is not representative, but if we need to comment on it, it is quite worrying that planning and leadership are left as least needed for an occupation that often has to deal with natural factors and should rely on having the trained activity leader to be prepared and be able to control the actions of the participants. The results might have another explanation – if the participants were more concerned about the animator's occupation, that would usually take part in a resort or hotel facilities and probably have more entertaining side, than physical activity.

The skills in need of improvement in the current workforce of outdoor activity leaders and animators are hard to pinpoint. The low respond rate has put only one distinguishable skill forward – ability to work with different participants. The EU summary shows that the skills in most need of improvement for this occupation are ability to work with people with disabilities, Use of technology, equipment and tools, marketing and sales skills.

3) Employment and Skills of a Fitness Instructor and Personal Trainer

The Fitness instructor / Personal trainer occupation is again under represented in the study with only 9 organizations employing and 4 organizations willing to share their opinion on the skills of these professionals. Again, because of the small respond rate, these answers should be considered only as a hint on the understanding of the occupation, and not as representative data that can lead to concrete conclusions.

Among the most important skills and attributes needed for this occupation, the 13 respondents have put the Exercise science knowledge; Ensure health and safety of participants; Ability to work in compliance with the standards and codes of ethics. Least needed are Marketing and selling skills, as well as leadership skills.

Differences with the summarized EU results are that effective communication and designing sessions and programmes are evaluated higher in the European wide results.

Skills in most need of improvement are again the ones, that were marked as least needed for the occupation – marketing and sales skills. This shows a bit of confusion in the respondent organizations. Other area in need

of improvement is the ability to work with older adults, which is a reasonable expectation, given the ever-increasing average age of the population in Europe.

4) Employment and Skills of a Sport Official

Sport officials are a bit better represented in the study, as all the federations, and some of the sport clubs do have officials in their workforce. However, it is important to note, that most sport officials do not have a working contract, but just temporary ones.

A total of 22 organizations have filled the information on Skills of sport officials. Complete consensus on the top needed skills: Apply the rules and laws of the sport; Uphold integrity and fair play; Decision-making; Problem-solving. Least needed by far are the Customer service skills. The summarized EU results are similar, with only including the Ability to work in compliance with the code of practice/ethics being evaluated in the top needed attributes.

In most need of improvement, the Bulgarian respondents have indicated Managing conflict; Apply the rules and laws of the sport; Team working skills.

Interesting for sport officials is that more than half of the respondents, 57,14% would expect the similar skills and abilities from volunteer officials as from paid staff. This is a questionable response, as being a sport official requires specific training and knowledge, and it is usually hard to recruit even as paid staff in many of the sports.

5) Employment and Skills of Senior Management Staff

The senior management staff has been represented by 37 organizations that have reported to employ this position and another 5 that are willing to share their opinion. The European and Bulgarian surveys do not differ too much in the needed qualities and both list as most important problem-solving, decision-making, teamwork, organizational and planning work. There isn't much difference between the highest ranking and lowest ranking attributes needed, so it is hard to pinpoint what is considered not vital for this occupation. but survey the least awarded skill is the client service.

In terms of improvement again there are similar results between EU and Bulgaria, with the skills with the most need of development being Marketing and Sales; Change management; Teamwork; Knowledge of external policy issues facing sport.

Again, a large part of 46% would expect similar result between volunteers and paid senior management. It should be noted that in many sport clubs the senior management is performed voluntarily by the members of the general assembly.

6) Employment and Skills of Middle Management Staff

Employment and skills of middle management staff has been evaluated by 21 organizations that employ this occupation, and 4 that do not. Most important skills and attributes of the middle management have been awarded to verbal communication skills, organizational and planning skills, team working, ability to work in compliance with the codes of practice/ethics. Lowest scoring skills are financial control and management, as well as business development skills. These answers correspond to the summarized EU wide answers.

The respondents have evaluated the knowledge on sport policy and external challenges, abilities for business development, abilities in written communication, marketing and sales, financial control as skills in need of

improvement in the current workforce. On EU level, such skills have been the strategic thinking, business development, managing change, leadership, promoting innovation.

The number of respondents, expecting the same abilities between paid and unpaid staff for this occupation is 28,57%, which is expected, as most of the middle management would be people on working contract, but still there are some sport organizations, that would rely on the voluntary work of the GA members.

7) Employment and Skills of Operational Staff

A total of 29 organizations have shared their opinion and experience on the Operational staff occupation, just two of them are not employing such position. The most important skills and attributes according to the respondents are technical skills and knowledge required for their role, ability to work in compliance with codes of practice/ethics, team working skills, use of technology, equipment and tools.

Least important have been deemed marketing and selling skills, as well as leadership skills. These results are again similar to the European summary of the survey.

In terms of potential for the operational staff currently active in Bulgaria, the respondents have selected use of technology, equipment and tools, followed by communication skills. The prior skill is expected, as in many organizations there aren't many people to have knowledge on the latest technologies and tools used for their positions.

8) Employment and Skills of Clerical and Office Staff

Again, an occupation with not too great representation of 22 organizations, which is expected, as such positions are often combined with other duties in most of the sport clubs.

Administration skills were unanimously selected as the most essential, followed by Understanding written documents and writing clearly, team working skills, technical skills and knowledge related to their job. Least important have been deemed the leadership skills by far. Again, these answers correspond to large extent with the summarized European results.

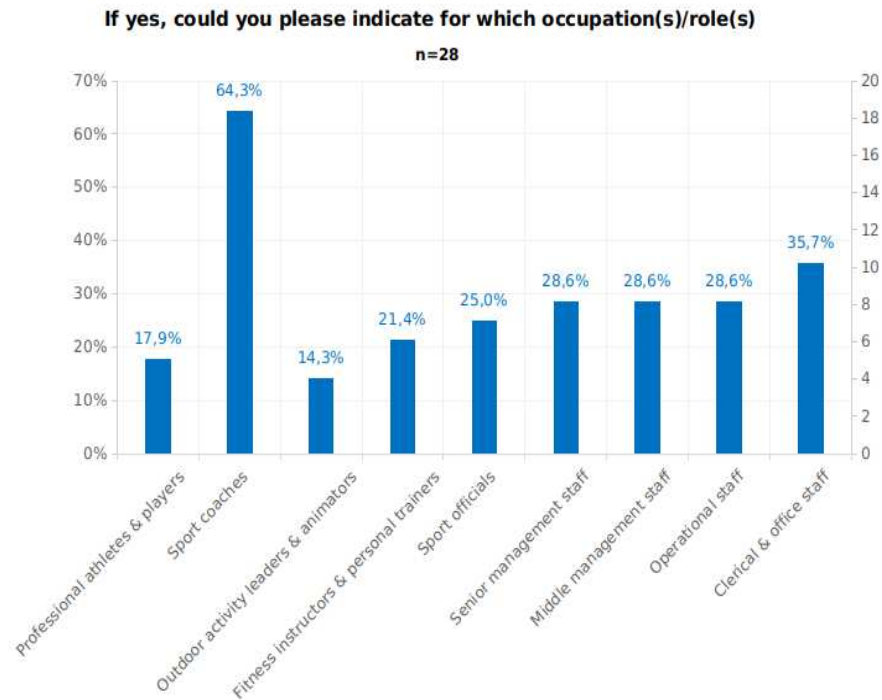
According to the respondents, improvement is needed in Administrative skills, problem-solving, organizational and planning skills, use of technology, equipment and tools.

9) Summary on Employment and Skills of the Analysed Occupations

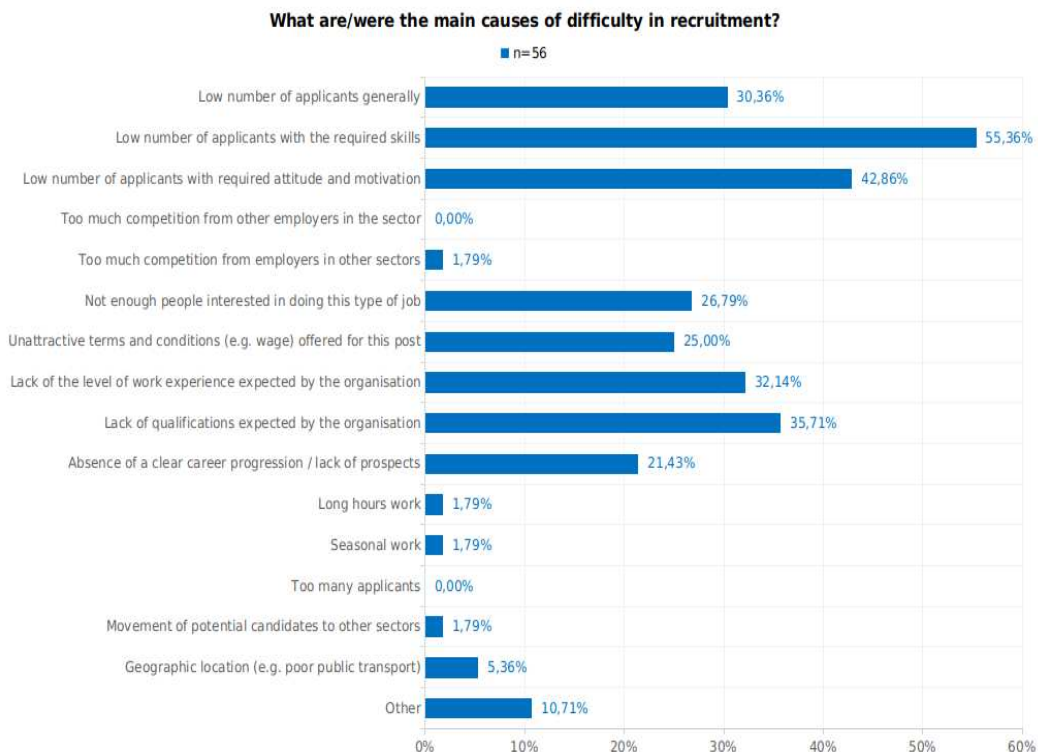
As a whole, most of the occupations have shown that there is significant overlap between the EU summarized answers and the answers of the Bulgarian respondents. One recurring category, that has been systematically been evaluated less than in the EU is the ability to work in compliance with the codes of practice/ethics. Other groups of skills that have been often underestimated, including in the EU survey at times are the marketing and selling skills, as well as the customer service skills, which could be very useful in an organization, functioning on the free market, even if the position is not directly linked to sales or working with customers.

10) Recruitment and retainment

According to the respondents, only in 28 organizations there were new recruitments in their workforce. The majority of those were sport coaches, which is expected, given that the most of the organizations, taking part in the survey are sport clubs.



Low number of applicants with the required skills is the biggest obstacles in recruiting new personnel for the organizations in Bulgaria, followed by low number of applicants with the required attitude and motivation as well as lack of qualifications expected by the organization.



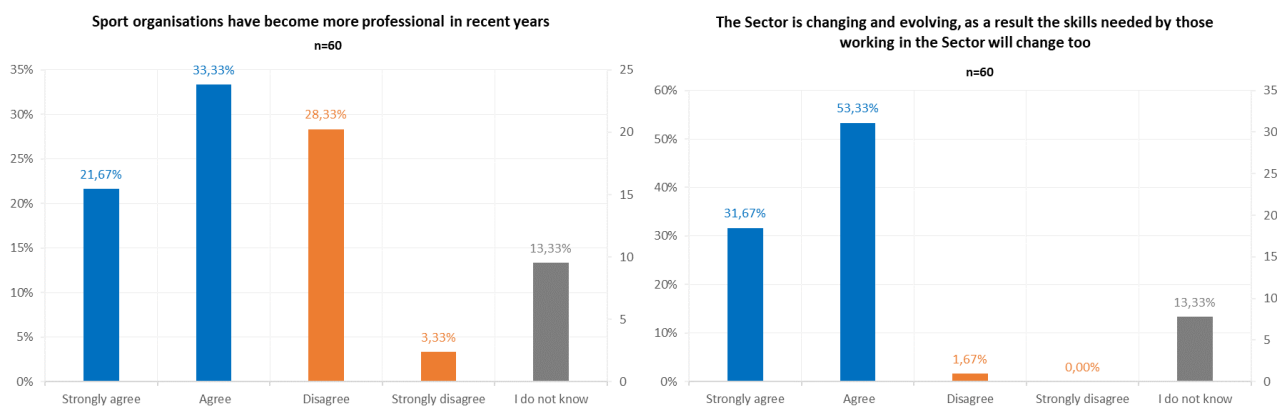
None of the respondents have shown that there were too many candidates, as well as too much competition from other employees in the sector. Low are the scores of the long work hours, movement of potential candidates to other sectors, too much competition from employers in other sectors, seasonal work.

The hardest occupations to retain employees are the sport coaches and clerical staff, followed by the sport officials. The main reasons for not being able to retain employees are the better pay offered by other organizations or in other job roles, as well as lack of commitment to the job/organization, lack of career progression/pathway.

The defined main topics in the Bulgarian survey on the topic of recruitment and retainment are similar to what can be seen in the summarized European results.

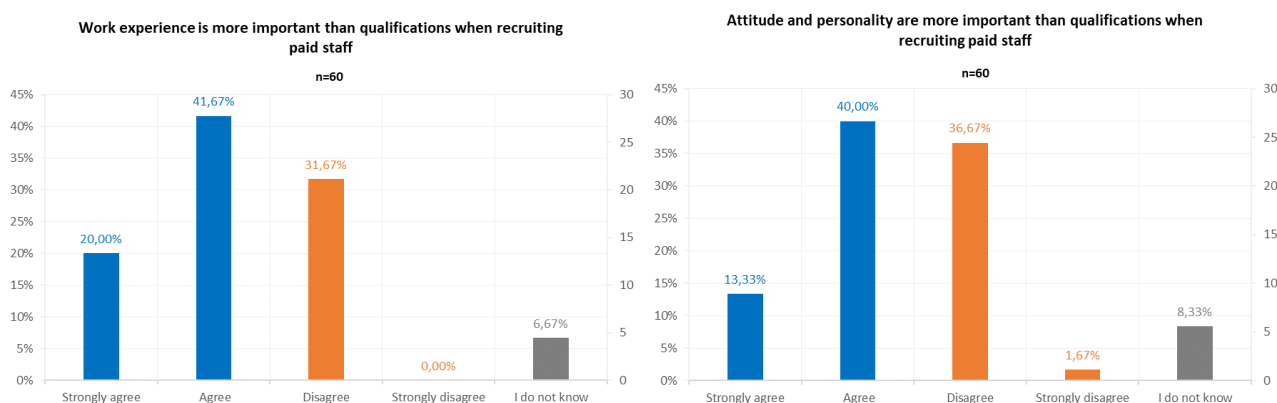
11) Working in Sport and Physical Activity – Key Issues

More of the respondents agree on the sport organizations becoming more professional in the recent years, but still one third are not supporting that claim. This can be due to the understanding of the meaning of professional organization, and the fact that many non-profit organizations, such as the sport clubs do not



consider themselves as professional. In the meantime, almost all respondents agree that the changes in the sector will lead to the need of new skills for the people working in Sports.

On that note many of the respondents consider that past experience is more important than qualifications when recruiting paid staff – a total of 61,67% agree. This could hint that the available training and education programs, providing the qualification are not well suited to the needs of the organizations. On the other side are a total of 31,67%, who disagree with experience being more important than qualification.

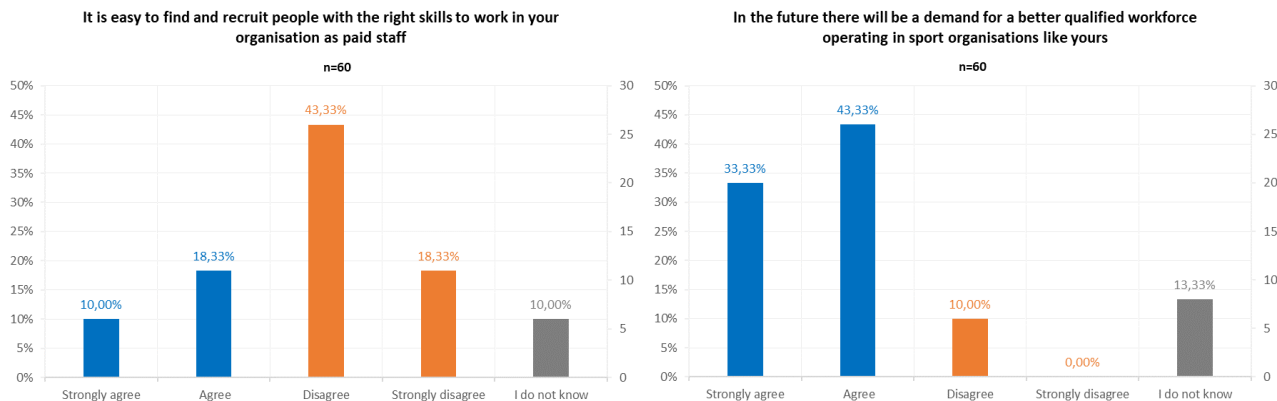


A bit more balanced is the distribution on the topic of attitude and personality, with 53,33% agreeing that it is more important than qualifications. This could mean that the respondents think that the necessary skills and attributes can be acquired in the process of working.

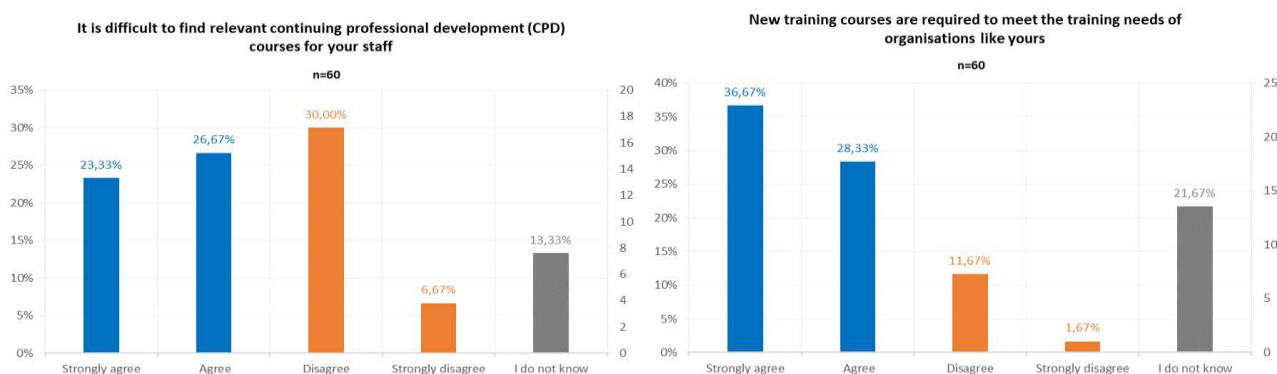
No surprises at the answers of the inclusivity of the sport and physical activity sector, both for attracting participants and at the workplace. There are practically one or two organizations that have stated that they

disagree, and all the rest are supporting the inclusivity. Same consensus there is for the improvement of governance as a priority for all sport organizations, as well as the importance of effective governance to their specific organization.

A large portion of the respondents disagree that it is easy to find and recruit people with the right skills, which was already presented in the previous figures with other obstacles in recruitment. On the other hand, most of the organizations foresee an increase in demand for better qualified workforce in the future. This emphasises the need for proper training courses that would provide the needed skills and attributes to the future workforce.

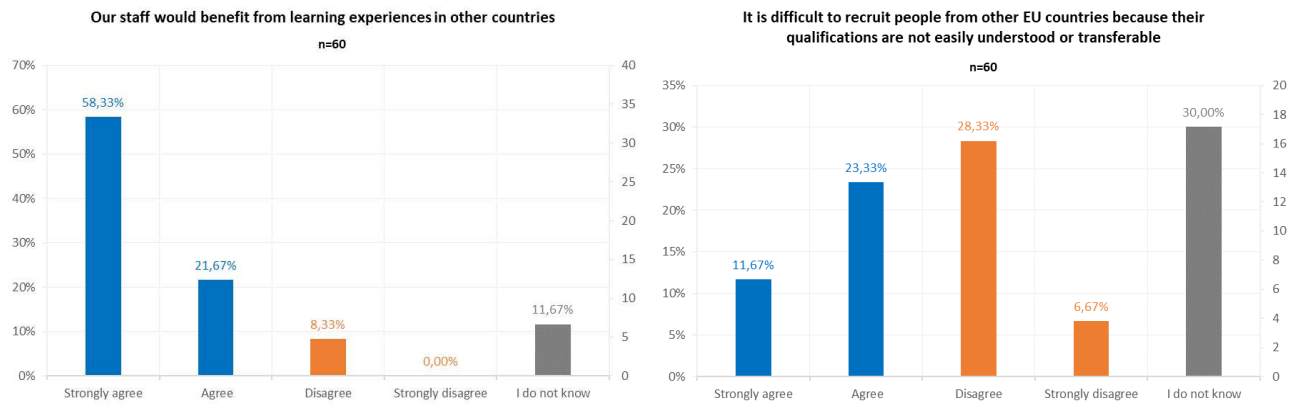


Almost all organizations consider their staff to be willing to train and develop professionally, and also consider that the employees should have access to on-going training to keep their skills up to date. A large part of the organizations also monitors the need for trainings and skills improvement of their employees. However, half of the respondents agree that it is difficult to find relevant CPD courses for their staff, and that there is a need of new training courses to meet the needs of their organization.



The organizations express their willingness to work more closely with the training providers and universities in order to have the courses that their staff requires.

Other important topic is the ability to train and to exchange experience and good practice with other countries. On these questions, the respondents have stated that they are supporting the need for access to programs for learning experience in other countries. However one third of the organizations find it hard to recruit people from other EU countries, or people that have obtained qualifications in other EU countries, because the programs are not easily transferable or understood. This suggest there should be a more clear and straight forward way for the applicants to validate their qualifications, and for employers to check the compliance and validity.



As a conclusion, there is a clear expectation of development in the sector, increasing requirements for specific skills and need of more skilled employees in the sector. Even at the moment the skills are a leading obstacle in recruitment and there is shortage of employees with the needed qualification. This suggests the need for the development of courses for qualification, continuous development and training for the sport sector. Such courses however should be, according to the sport organizations, developed in cooperation between the training providers and the employers. Also there should be a better system for transfer of qualifications between EU countries as well as access to training abroad.



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REPORT ON NATIONAL CONSULTATIONS

8. REPORT ON NATIONAL CONSULTATIONS

For the national consultation a round table meeting has been organized and subsequent individual dialogues were conducted with representatives of several large stakeholders in the sector.

The round table has been held on 19th of April 2019, and 21 participants representing 15 organizations, according to the signature list. Many of the participants however, were actually involved in the work of several organizations, which increases the influence of the meeting.

The agenda for the round table started with a tour de table, followed by presentation on the ESSA Sport project, the consortium of partners, the working methodology, and the advancement of the project at that time. The data made real impression on the participants, and there were many comments on the importance of the topic, the positive impression from the wide partnership, and the well thought methodology.

The meeting then continued with the presentation of the official statistics data. Main impression that was discussed widely in that section were the differences in the type of contract, education level, age structure of the employed persons, and the most significant – the difference between the EU and Bulgaria data in terms of percentage of the total amount of people employed in Sport Sector as part of the total workforce, which is nearly two times lower.

The participants all supported the conclusion, that the official statistics fall short to represent the real breadth of the sector, and that there is quite large amount of people, engaged in the sport sector, that are either mislabeled for administrative reasons, working without a contract, or unregistered self-employed people. It was mentioned, that probably the total amount of people employed in Sport Sector as part of the total workforce are close to the EU average, but since there is no effective control and monitoring of the sector, the official data is unable to come up with that data.

Next in the agenda was the presentation of the internet employers survey. The extensive data was summarized and was presented close to the available in this report. Given the distribution in terms of type and number of organizations taken part in filling the questionnaire, the data was validated by the participants in the round table. Important remarks were made by some representatives, such as the Bulgarian Golf Association, the Bulgarian Sport for All Association, Bulgarian Handball Federation, etc. that updating the programs for qualification and training is very important, but not always happens with the needed frequency. Part of this is because there is not enough cooperation between sport organizations and training providers, owed to both sides. There are of course also good practices in many federations and types of sport organizations, including Bulgarian Yoga Federation, Bulgarian Body Building Federation, Bulgarian Athletics Federation, etc.

Other reasons for training providers not being able to respond with up to date training programs for the sport sector have been pointed, such as administrative burden in the recognition and evaluation of the programs and curriculum, as well as the legal requirements for the occupations in the sector, such as a minimal bachelor degree. This reduces flexibility of the programs for preparing new workforce for the sector, as the programs are more rigid, and the number of training providers are limited.

CPD courses are available, but often they are either too general, or repeat the curriculum of the bachelor programs. There are a number of trainings, that are presented with no grounds in the education system, such as the ones delivered by private organizations issuing own certificates, not necessarily recognized or used by all sport organizations.

Other issues that were discussed during the round table was a large part about the new Law of Physical Education and Sport, that has been introduced in the beginning of the year. The conflict points in relation to

the ESSA Sport project were the requirements for obtaining the qualifications of a sport coach, which presented the possibility for an individual to become a coach by attending trainings, presented by a federation or other training provider, given that the program is recognized by the international federation and used in at least 5 other countries, and has a certain minimum amount of training hours. This presents a conflict of interest for the participants in the round table, as they expressed concerns on the level and quality of educations by such programs for sports and fear that the knowledge and skills of the coaches will be neglected, but qualifications will be awarded for the sake of having more coaches, not better prepared ones. Other troubling point on that topic is for the control if a training program for coaches qualifies even by these standards, as it was unclear who and how will exercise the control and evaluation of such courses.

In the individual consultations a representative of the Ministry of Youth and Sport was contacted, and most of the discussion followed the findings of the round table. There was a difference in the opinion about the new law, as the ministry backs the text and claims it is still to be tested in practice, as the law is in force for too short time. The rest of the conclusions were accepted and confirmed by the representative.

Similarly, the Bulgarian Association for Sport Development agrees with the conclusions of the round table, but puts forward the need for proper legislation on the matters of volunteering, education through sport, and double career in sport. Topics, that they consider overlooked in the current legal texts.

Other organizations were contacted, but for the most part their representatives were not willing to talk on behalf of the organization, but as personal opinions. There was a consensus on the conclusions from the round table and the interpretation of the statistical data and the survey.



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NATIONAL CONCLUSIONS

9. NATIONAL CONCLUSIONS

Given all that has been presented in this report, there are the following main points and conclusions:

As part of the European Union many of the characteristics on the legislation and educational system are aligned with the rest of the European countries. However, there are certain peculiarities that need to be taken in consideration.

On legislation, there is certain discussions on the newly introduced Law of Physical Education and Sport, concerning obtaining qualification for Sport Sector occupations. The ability to obtain such qualification without going through the official education system might bring easier access to new and up to date courses, but also might be misused without proper control and monitoring, for increasing the number of coaches and instructors, and “selling” qualifications.

In the educational system, the administration and program evaluation procedures are limiting and burdensome, which makes the official way of obtaining qualification more rigid and for some part it is not responding well to the current needs of the sector. The number of training providers are also very limited, given that the requirements for many of the positions are at bachelor level.

In the official statistics have shown that there the educational peculiarities lead to significant difference in the age of the employed in the sector people. Other significant differences with the EU were the full-time and part-time contracts, and the part of the working force, that is engaged in delivering sport. These could be explained with a large grey sector of unregistered, mislabelled or working without contract individuals, that probably make up for large part of the difference.

However, statistics show that the sector is developing, especially in the fitness industry and sport facilities. There is a certain shift from organized sports in sport clubs to participation sport provided by the aforementioned segments of the sport sector.

The employer survey shows a clear expectation of development in the sector, increasing requirements for specific skills and need of more skilled employees in the sector. Skills are a leading obstacle in recruitment and there is shortage of employees with the needed qualification. There is a need for development of courses for qualification, continuous development and training for the sport sector, developed in cooperation between the training providers and the employers. There should be a better system for transfer of qualifications between EU countries as well as access to training abroad, for the possibility to exchange experience and good practice between member countries.

The National consultations have validated the data and the participating organizations and large keyholders have expressed agreement with the conclusions that have been drawn in this report.



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**NATIONAL ACTION PLAN
AND
RECOMMENDATIONS**

10. NATIONAL ACTION PLAN AND RECOMMENDATIONS

Thematic 1: Monitoring of the development of the sport sector

The data suggests that the significance in the sector in Bulgaria is being undermined because of mislabelling of economic activities of organizations and job titles within those organizations, unregistered and informal private persons delivering sport services, large number of unregistered volunteers, etc. This requires for the key stakeholders to take actions in revealing and recognizing the true size of the sport sector and to monitor its development.

Recommendation	Priority Action	Actors	Timeline	Measure of success
Establishing a network for monitoring the whole breath of the sector	Developing methodology for monitoring the sector	Ministry of Youth and Sport (MYS), National Statistical Institute (NSI), National Sports Academy(NSA)	By the end of 2020	Establishing concrete marketing and sociology research methodology for the sport sector
	Implement the monitoring methodology	Local representations of the MYS, NSA	Annually	Collection of reliable data on the status of the sector
	Results dissemination	MYS, NSA	Annually	Publishing a report and scientific articles on the development of the sport sector
Improving the legislative framework for bringing out the grey part of the sport sector	Analysing the scale of the grey part of the sport sector	MYS, NSA	Annually	Arriving at a scientifically backed and well-informed proposition for the magnitude of the grey economy in the sport sector
	Proposing legislation measures to promote the formalizing of the people and organizations, acting in the grey sector	MYS, NSA	When deemed necessary	Accepting law amendments or issuing ministry regulations, narrowing the grey sector.
	Monitoring of adherence to the legislative regulations	MYS	Ongoing	Promoting the registration, performing checks and determines penalties.

Thematic 2: Ensuring delivery of sport education in accordance to the needs of the market

The pilot study has shown the interest and the needs of the sector for improvement of the education and training for the workforce in the sport sector. In the meantime, the legislation requirements for qualifications are creating tensions between the sport organizations and the training providers. The issues in the in-time delivery of skilled workforce is addressed in this thematic.

Recommendation	Priority Action	Actors	Timeline	Measure of success	Comment
Ongoing monitoring on the skills and abilities required by the sport sector	Adjusting the labour market research methodology using the ESSA Project as a base research	NSA	By the end of 2020	Stable and valid methodology for monitoring of the sport market	NSA should have leading role on these and they could be implemented and financed as a national or institutional research project
	Implementing the labour market research	NSA, other sport education providers, MYS	Annually	Valid data on the required skills and abilities in the sports labour market	
	Results dissemination	NSA	Annually	Publishing a report and scientific articles on the development of the sport sector	
Developing adequate educational courses and curriculums	Adjusting the curriculum of existing higher education programs	NSA, other sport education providers	Annually	New topics, knowledge and skills introduced in the higher education programs	It should be noted that higher education has a legislative limit on the part of the curriculum that can be changed without triggering heavy administrative procedures
	Introducing and offering new VET and requalification courses	NSA, other sport education providers	Annually	Up-to-date courses for improvement of qualification, skills and abilities, being offered to the sport sector	
Regulating the delivery of qualifications and training courses	Regulating higher education programs for sport education	NSA, Sport training providers, National Agency for	Annually for inhouse quality control	Positive evaluation according to the established quality control	

		Evaluation and Accreditation (NAEA)	NAEA Accreditation period is according to the mark received	and accreditation methods	
	Regulating VET courses	NSA, VET centres, National Agency for Vocational Education and Training (NAVET)	Ongoing	Positive evaluation of training providers.	
	Regulating sport coach qualification courses, delivered according to article 11 of the Regulation 1/04.02.2019 on coaching personnel.	MYS	Ongoing	Documentation on recognition of international courses for coaching levels.	The cited regulation allows for persons with no higher education or official qualification to obtain different coaching levels if they have passed a proprietary course, recognised by the International federation and used in at least 5 countries. However, it is not noted who is controlling this information.

Thematic 3: Promoting diversity and inclusiveness in sport organizations

Even if statistically Bulgaria is performing at the average and slightly above average on these topics, it could benefit of a more structural approach and promotion from within the sector.

Recommendation	Priority Action	Actors	Timeline	Measure of success
Inclusion and gender equality	Establishing programs for developing and promoting the employment of women on decision-making positions	MYS, Sport organizations	Ongoing	Increase of women in middle and high management positions.
	Promoting diversity and inclusiveness in sport organizations through programs and access to training and education	MYS, Sport organizations	Ongoing	Increase of employment of people from diverse social groups in the delivery of sport








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