

# NATIONAL REPORT

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

**Poland** 

September 2019





# **TABLE OF CONTENTS**

TABLE OF CONTENTS	2
1. THE ESSA-SPORT PROJECT AND BACKGROUND TO THE NATIONAL REPORT	4
2. NATIONAL KEY FACTS AND OVERALL DATA ON THE LABOUR MARKET	8
3. THE NATIONAL SPORT AND PHYSICAL ACTIVITY SECTOR	13
4. SPORT LABOUR MARKET STATISTICS	28
5. NATIONAL EDUCATION AND TRAINING SYSTEM	46
6. NATIONAL SPORT EDUCATION AND TRAINING SYSTEM	52
7. FINDINGS FROM THE EMPLOYER SURVEY	57
8. REPORT ON NATIONAL CONSULTATIONS	98
9. NATIONAL CONCLUSIONS	102
10. NATIONAL ACTION PLAN AND RECOMMENDATIONS	104
RIBI IOGRAPHY	107



This national report has been produced by the *Institute of Sport - National Research Institute* 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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# 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.

#### a) 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.

#### b) 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.





#### c) 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.

#### d) 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.



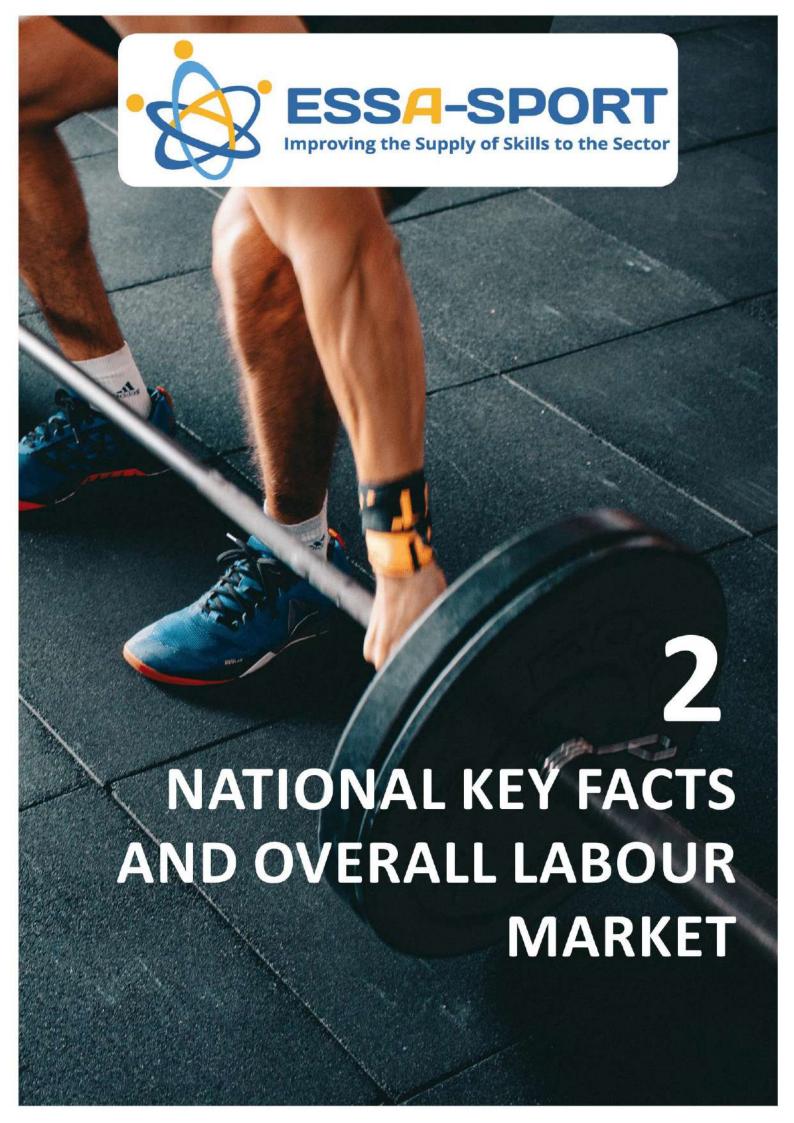


#### e) Consultations and conclusions

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.







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

# a) National key facts and data

# POLAND (Republic of Poland)

# 1) General information

Capital: Warsaw

Area: 312 679 km² (ranked 69<sup>th</sup> in the world)

Neighbouring countries: Germany, Czech Republic, Slovakia, Ukraine, Belarus, Lithuania, Russia

(Kaliningrad Region)

**Population**: 38.52 million (2018)

# Population structure by gender and age

	Total	Total Structure by gender (%)			Structure by age (%)						
	population	Female	Male	0-14	15-24	25-54	55-64	65+			
2017	38 433 558	51.62%	48.38%	15.15%	10.60%	43.26%	14.03%	16.96%			
2016	38 432 992	51.62%	48.38%	15.02%	10.99%	43.31%	14.28%	16.40%			
2015	38 437 239	51.61%	48.39%	14.97%	11.42%	43.33%	14.47%	15.81%			
2014	38 478 602	51.61%	48.38%	14.98%	11.85%	43.38%	14.52%	15.27%			
2013	38 495 659	51.61%	48.39%	14.99%	12.30%	43.54%	14.43%	14.74%			
2012	38 533 299	51.60%	48.4%	15.04%	12.76%	43.70%	14.26%	14.24%			
2011	38 538 447	51.59%	48.41%	15.10%	13.21%	43.89%	13.98%	13.82%			
2010	38 529 866	51.59%	48.41%	15.20%	13.69%	44.03%	13.61%	13.47%			
			1		1		•				





#### Total professionally active population, including unemployment and employment data

			Total employed <sup>2</sup>								
	Total active population <sup>1</sup> (in thousand)	Total unemployed (in thousand)	Total employed (in thousand)	, 0	nder <b>(%)</b>	By age <b>(%)</b>					
				Female	Male		25-54	55-64			
2018	30 429	659	16 464	44.93%	55.07%	х	х	х	х		
2017	30 595	844	16 423	44.80%	55.20%	7%	76%	15%	2%		
2016	30 703	1 063	16 197	44.85%	55.15%	7%	76%	15%	2%		
2015	30 962	1 304	16 084	44.87%	55.13%	7%	76%	15%	2%		
2014	30 984	1 567	15 862	44.66%	55.34%	7%	77%	14%	2%		
2013	31 037	1 793	15 568	44.50%	55.50%	7%	77%	14%	2%		
2012	31 038	1 749	15 591	44.51%	55.49%	7%	78%	13%	2%		
2011	31 003	1 659	15 562	44.43%	55.57%	7%	79%	12%	2%		
2010	30 955	1 650	15 473	44.65%	55.35%	8%	79%	11%	2%		
							•	•			

**Population density**: 123.20 persons/km<sup>2</sup>

**GDP** (2017): 524.5 billion USD

**GDP per capita**: 13 811.66 USD (2017)

Inflation rate: 0.90% (January 2019)

**Unemployment rate**: 6.2% (January 2019)

Official language: Polish

#### Poland's political system:

- The organizational structure of the Polish state is defined by the Constitution of the Republic of Poland, adopted by the National Assembly on 2 April 1997. According to the Constitution, the Republic of Poland is a parliamentary democracy that embodies the principles of: sovereignty of the people, independence and sovereignty of the state, democratic state of law, civil society, separation of powers, pluralism, rule of law, social market economy and inherent human dignity. The Republic of Poland is a unitary state.
- The three branches of power:
  - 1) Legislative branch: a two-chamber parliament with the Sejm as the lower house and the Senate as the upper house:
    - The Sejm has 460 representatives elected by secret ballot in general, equal, direct and proportional elections; the current Speaker of the Sejm is Marek Kuchciński
    - The Senate has 100 senators elected in secret ballot in general direct elections. The current Speaker of the Senate is Stanisław Karczewski

ESSA-Sport National Report – Poland

 $<sup>^{\</sup>mathrm{1}}$  The Active Population also called Labour Force, is the population employed or unemployed

<sup>&</sup>lt;sup>2</sup> Employment is defined as the number of people engaged in productive activities in an economy. The concept includes employees, self-employees and family workers





#### 2) Executive branch:

- The Council of Ministers comprised of the Prime Minister and ministers. Both the Prime Minister and Deputy Prime Ministers may hold ministerial positions. The Constitution provides for two types of ministerial positions: ministers who are heads of the individual government departments, and those who are members of the Council of Ministers and chair its various committees. The current Prime Minister is Mateusz Morawiecki.
- The President is the supreme representative of the Republic of Poland. The President guarantees the continuity of power, as well as guards the Constitution, the sovereignty and security of the State and the integrity and indivisibility of its territory. The duties of the President and the principles of performance thereof are laid down in the Constitution. The current President is Andrzej Duda.
- **3) Judiciary branch:** courts and tribunals; the following bodies are involved in judiciary proceedings:
  - The Supreme Court supervises common and military courts,
  - Common courts the common court system involves three tiers, i.e. district courts, regional courts and courts of appeal; common courts rule in matters governed by criminal, civil, labour, commercial and family law;
  - Administrative courts control the legality of decisions made by both the government and by local governments;
  - Military courts are criminal courts which primarily rule in cases involving crimes committed by military personnel in active service.

Form of government: Democracy, parliamentary republic

**Independence**: Poland regained independence in 1918 (after 123 years during which it was

partitioned).

**EU membership**: Poland became a member of the European Union on 1 May 2004 on the

basis of the Accession Treaty signed on 16 April 2003 in Athens.

Monetary unit: złoty

**Dominant religion**: Catholicism (87.58%)

Schengen Area: Yes, since 21 December 2007

Organization and functioning of the economy in Poland – division into three sectors:

- ★ primary sector agriculture, forestry and fishery,
- secondary sector manufacturing and construction
- tertiary sector services

**Territorial self-governments** – territorial self-governments perform public-sector tasks that are outside the scope of responsibilities of other authorities; the basic unit of territorial self-government in Poland is a municipality (Polish: gmina); the territorial self-government structure is comprised of three levels:

- municipality (Polish: gmina) level − 2478 municipalities,
- district (Polish: powiat) level − 314 districts,
- voivodeship i.e. region (Polish: województwo) level 16 voivodeships.





# Total number of employed persons by economic sectors (NACE Rev.2 Codes3)

NACE CODES SECTIONS			TOTAL NUN	BER OF EM	PLOYED PERS	ONS	
NACE CODES – SECTIONS	2011	2012	2013	2014	2015	2016	2017
A - Agriculture. forestry and fishing	2376705	2378040	2378994	2384893	2384786	2385455	2386041
B - Mining and quarrying	175582	174119	168555	160235	148021	139796	138185
C - Manufacturing	2443625	2406761	2421149	2517785	2582104	2679486	2773254
D - Electricity. gas. steam and air conditioning supply	152849	143439	137197	130516	125221	123217	122450
E - Water supply; sewerage. waste management. remediation activities	143312	143473	145193	147151	148470	152072	154712
F - Construction	909238	866998	810456	819997	839998	879283	913941
G - Wholesale and retail trade; repair motor vehicles/motorcycles	2158828	2122924	2121875	2176576	2222138	2290475	2347858
H - Transportation and storage	727843	730008	729978	743736	767330	818621	874612
I - Accommodation and food service activities	237493	246408	244693	248683	252311	270631	291376
J - Information and communication	249418	259079	270834	292117	317962	341585	366457
K - Financial and insurance activities	346307	349399	352172	356762	350490	353844	353338
L - Real estate activities	198205	195189	199199	203912	205475	216980	224322
M - Professional. scientific and technical activities	518171	531428	553299	588690	615706	654879	680041
N - Administrative and support service activities	413885	425402	443229	464826	500173	547237	589152
O - Public administration and defence; compulsory social security	951880	958209	963009	971147	970774	977039	978356
P - Education	1084731	1085982	1100301	1124156	1137763	1152896	1173114
Q - Human health and social work activities	775372	790567	804739	827259	841959	866103	879884
R - Arts. entertainment and recreation	153307	146977	140042	144920	146188	150583	154220
S - Other service activities	215860	217617	259336	260026	272923	293159	309515
Please indicate the source	Reports b	y Statistics F	Poland– for	ms no Z-06,	SP-3 and SOF		

<sup>3</sup> See <a href="http://ec.europa.eu/eurostat/documents/3859598/5902521/KS-RA-07-015-EN.PDF">http://ec.europa.eu/eurostat/documents/3859598/5902521/KS-RA-07-015-EN.PDF</a>

ESSA-Sport National Report – Poland 11







# 3. THE NATIONAL SPORT AND PHYSICAL ACTIVITY SECTOR

#### a) Ministry of Sport and Tourism

The Ministry of Sport and Tourism (MSiT) is a Polish Ministry headed by the minister competent for sports and tourism. Since 2015, the office has been held by Witold Bańka.

#### 1) Main tasks:

- development of sport for all and competitive sport;
- oversight of all sports associations;
- promotion of Poland abroad;
- support for sport for children and youth;
- international cooperation;
- development of sport for the disabled;
- oversight of the tourism market and tourism development directions

The Ministry is located in a building named Pałac Blanka [the Blanka Palace] at ul. Senatorska 14 in Warsaw.

# 2) Minister and senior officials:

- ★ Witold Bańka (PiS), Minister of Sport and Tourism since 16 November 2015
- Anna Krupka (PiS), Secretary of State since 28 November 2018
- 🕸 Jan Widera, Undersecretary of State since 24 May 2016
- 🕸 🛮 Dariusz Rogowski, Director General

#### 3) Organization structure

The ministry comprises the Minister's Political Office and the following organizational units:

- Economic and Financial Department
- Department of Sports Infrastructure
- 🕸 Control and Supervision Department
- Legal Department
- Department of Sport for All
- ★ Elite Sport Department
- Department of Tourism
- ♦ Office of Director General
- Communications Division
- Office of the Minister

# 4) Organizational units accountable to the Minister:

- National Sports Training Centre head office in Warsaw
- 🕸 Institute of Sport National Research Institute based in Warsaw
- 🕸 Polish Anti-Doping Agency based in Warsaw
- Polish Anti-Doping Laboratory based in Warsaw
- Polish Tourist Organization, based in Warsaw





#### 5) The Act on Sport:

The Act of 25 June 2010 on Sport

Published in Poland in: Journal of Laws no. 127 of 2010, item 857

Consolidated text Journal of Laws of 2018, item 1263

Entered into force on 16 October 2010

Type of legislative instrument: Act of Parliament

Area regulated: sports law

Status: in force

Amended version: Journal of Laws of 2018, item 1669

Amended version's entry into force: 1 October 2018

Objections regarding certain legal terms

The Act of 25 June 2010 on Sport was adopted by the Sejm (lower chamber) of the Polish Parliament to regulate certain issues in the field of sport practice and organisation in the country.

#### The Act sets out:

- operating principles of sports clubs and associations
- operating principles of Polish sports associations
- principles of oversight of Polish sports associations
- powers of the Polish Olympic Committee
- principles regarding sport promotion by public authorities
- sport safety principles
- professional qualifications in sport
- regulations on disciplinary liability and disputes' resolution in sport.

#### The following acts govern employment in sport:

- Act of 25 June 2010 on sport (Dz. U. [Journal of Laws] of 2016, item 176), as amended;
- Act of 7 April 1989 on associations (Dz. U. of 2017, item 210), as amended;
- Labour Code Act of 26 June 1974 (Dz. U. of 2016, item 1666), as amended;
- Act of 20 April 2004 on the promotion of employment and on labour market institutions (Dz. U. of 2017, item 1065, as amended).

In August 2015, the 2020 Sports Development Programme<sup>4</sup> was published by the Ministry of Sport and Tourism. The programme is part of the new approach to strategic planning, outlined in the Act on the principles of development policy. The 2020 SDP is a medium-term strategic document that defines goals, priorities and areas of intervention in sport.

Objective 1 covers activities relating to ensuring appropriate conditions for mass-scale involvement in physical activity.

Objective 2 is focused on the social dimension of sport conducive to social capital building.

<sup>&</sup>lt;sup>4</sup> 2020 Sport Development Programme, the Ministry of Sport and Tourism, Warsaw, 2015





Objective 3 covers activities relating to optimized operation and structure of entities involved in the development and implementation of sports policy, including, in particular, on the broader use of evidence-based sports policy that is in line with good governance principles. An important part of this objective is to build an optimal legal framework for sport development and to set out the rules for cooperation between all sport stakeholders, in particular local governments and non-governmental organizations.

Objective 4 adopts a new approach to elite sports: sporting results achieved in international competitions are not a goal in itself but a method of promoting physical activity at grassroots level and of promoting Poland internationally.

#### b) Sports organizations and their members

In 2016, Poland had 91.8 thousand active non-governmental organizations of which the largest number (26.7 thousand i.e. 29%) carried out their statutory activities in the field of "sports, tourism, recreation and leisure". 19.9 thousand i.e. 22% of all active NGOs operated as associations<sup>5</sup>. Physical culture organizations, in particular sports clubs provide particularly good opportunities for building human and social capital. Yet, their number in relation to the country's population is significantly lower than in most other European Union countries. According to data by Statistics Poland<sup>6</sup>, in 2016 there were 14,858 sports clubs in Poland, i.e. there were 39 per 100 thousand inhabitants. It should be emphasized that access to such facilities is better in rural areas (42 clubs per 100 thousand inhabitants) than in cities (37 clubs per 100 thousand inhabitants). To compare, the number of clubs per 100 thousand inhabitants in Germany is nearly two times higher (110), in the Netherlands nearly four times higher (150) and in France over seven times higher (275). The largest increase (from 8.8 thousand to 13 thousand) in the number of sports clubs was recorded in the period 2002-2006. In the following years the number varied slightly. The increase was largely due to the introduction of a new form of sports clubs i.e. school sports clubs which have legal personality under the law, as opposed to former school sports clubs which had no such legal personality. The underused potential of sports clubs is also confirmed by the overall number of their members compared to the size of the population. Despite the large demographic potential, in 2016 all Polish sports organizations had 1020 thousand registered members. i.e. 27 per 1000 inhabitants. There were 50 members per sports club in rural areas and 83 members per sports club in cities. In other European countries the number of sports club members per 1000 inhabitants is significantly higher, e.g. 268 in France, 312 in the Netherlands and 341 in Germany.

#### c) Financing

In Poland, state-owned companies are the greatest sponsors of sport. In 2016, the sport sponsorship market reached the value of 832.4 million zloty and it grew a further 4.6% in 2017. More information on sport financing can be found on the website of the Ministry of Sport and Tourism, where the data is split into the following categories:

- Financing of the tasks of the Ministry of Sport and Tourism
- Competitive Sport
- Youth Sport
- Sport for All
- Sport for the Disabled
- Infrastructure
- 🕸 Tourism

<sup>&</sup>lt;sup>5</sup> Poland's non-profit sector in 2016, Statistics Poland, Warsaw and Kraków, 2018

<sup>&</sup>lt;sup>6</sup> Physical culture in Poland in 2015 and 2016, Statistics Poland, Warsaw and Rzeszów, 2017.





- Security and safety of sports events
- Remission of non-tax dues towards the state budget
- National Sports Training Centre as a state budget-funded entity
- Promotion of dual careers among athletes
- Sood practices concerning documenting expenditure of public funds obtained for the implementation of tasks in the fields of competitive sport, sport for all and sport for the disabled
- Duty to verify data with the Sexual Offenders Register.

#### d) Economy

Sport plays an important role in the economy. As demonstrated by the diagnosis, it significantly contributes to economic development, to GDP as well as to jobs generation. Its share in household expenditure is also notable. Sport as a phenomenon that is subject to globalization and commercialization increasingly frequently becomes an area of interest to businesses. This trend is visible also in the Polish market. The sports sponsorship value in our country increased from PLN 0.2 billion in 2001 to PLN 3.8 billion as of the end of 2013. However, the process entails certain risks some of which are related to the sports sector's regular infiltration by criminal groups. According to the report drawn up for the EU Sports Platform, the main risks to the integrity of sports competitions are doping and match-fixing. Yet, there are also other threats such as discrimination in sport and risks to the safety of sports event, which negatively impact the image of sport.

#### e) Sport's links with programmes in other areas

Health-enhancing activities include physical activity (sport), rational diet, personal hygiene, maintaining a clean environment, including sport facilities and equipment, ensuring safety during training and competition. Elements of health-supporting behaviour include medical check-ups, competition rules, fair play, good relations with fellow athletes, umpires and coaches, self-education and stress management. Physical exercise (training) is a means for maintaining physical fitness necessary for normal functioning. Training improves physical fitness as well as the technical, motoric and tactical skills associated with the given sport.

Sports training stimulates and improves the functioning of the body by upkeeping or increasing motoric skills, movement techniques and stamina. It helps integrate and democratize communities and is a factor facilitating inclusion and interpersonal communication. It is also an attractive tool in sociotherapy and in the reintegration and education of people who have problems with proper functioning in society.

The Governmental Programme for Social Activity of Seniors for 2014-2020: the Programme's main goal is to create conditions for the development of social activity of senior persons. Persons born during the demographic peak of 1950s are already, or will soon become 60+. Despite the end of their professional carrier they are still in good psychological and physical condition, have a lot of potential, qualifications, experience and free time which can and should be managed by developing adequate offers of community activities for them.

In the context of enhancing the physical activity of the society, of particular importance are the following priorities:

Social activity promoting integration within and between generations; in this field, the following activities are planned:

- community activities, including voluntary work of senior persons;
- physical activities for senior persons, including tourism and recreation activities;
- 🕸 building social networks. including volunteering work within and between generations





- Social services for senior persons (external services); in this field, the following activities are planned:
- training for volunteers and carers (in the field of assistance provision to seniors);
- supporting various forms of self-assistance;
- broader access to social services, including care, cultural, educational, advisory, sports and tourist ones.

The Civic Initiatives Fund programme for the yeas 2014-2020: The Civic Initiatives Fund is a programming and funding instrument aimed at increasing the civil society development dynamics. It is a tool for implementing the task, the need for which was identified as a result of public and private partnership, to increase civic activity and to strengthen the place and role of the tertiary sector in the implementation of public tasks. On 27 November 2013, the programme was adopted and since then an annual competition for projects has been held. Projects implemented under the programme are organized under four priorities: Small-scale initiatives; Active society; Active citizens and Strong non-governmental organizations. The directions of activities indicated in the Sport Development Programme 2020 in the field of increasing the social engagement of citizens through sport are related, in particular, to the following directions of the Civic Initiatives Fund: citizens' active community engagement through sport development in local communities, building positive civic attitudes among sports fans, and development of volunteering in various fields of civic activity.

#### f) Organization of sport at the local level

Each municipality is required to meet collective needs of its residents, also in the field of physical culture and sport. Since mid-October 2010, according to the new Act on Sport, local governments have the possibility to establish special councils for supporting the development of physical culture.

On 16 October 2010, the tasks of local governments in the field of sport have changed as a result of entry into force of the new Act on Sport. According to its provisions, sports councils may be established by local governments, i.e. specifically by heads of rural municipalities, town/city mayors, or county councils. Their role will also be to determine the rules for appointing members of the sports council as well as the regulations on their operation. The councils should first of all include representatives of organizations and institutions implementing tasks in the field of physical culture. According to the law, the council members will act on voluntary basis, without remuneration.

### 1) Sports Councils

The sports councils are, primarily, advisory and consultative bodies for local governments. Their main tasks will be to issue opinions on municipalities' and counties' development strategies and budgets, insofar as they relate to physical culture. Representatives of the councils may also issue opinions on draft resolutions regarding the development of physical culture, sports facilities in their areas, and on local spatial development plans within the scope of space use for physical culture purposes.

Sports councils operate mainly at the level of municipalities and counties. At the level of provinces, the councils' tasks are performed by provincial interdisciplinary associations that are members of the Polish Federation of Youth Sports.





#### 2) Investment in infrastructure

Every municipality is required to meet the needs of residents in the field of with physical culture and sport and to provide recreational areas and sports equipment. Although the construction of such facilities is very important, local governments should also remember about investing in ordinary school pitches, playgrounds. thematic parks, cycling paths and other infrastructure which amateur sports practitioners will be able to use in their free time.

The cooperation of local governments with other partners is justified primarily by the scale of their obligations in the field of physical culture and sport. The basic-level organizational units to implement the local governments' tasks in the field of physical culture are sports clubs. A special type of sports club is a school sports club whose members may be pupils, parents and teachers. School sports clubs are entered in registers kept by heads of county governments in counties where the clubs are located.

#### g) Co-financing of athletes

Local governments may also grant prizes and grants to athletes who have achieved particularly good results in international or national competitions, as well as to sports coaches and officials. Athletes without a license, who have achieved high sports results in international or national competitions, may also receive prizes and grants from the central-level state budget, in addition to those from the local government.

Local governments most frequently pay sports grants as financial support to athletes who are residents of the given town or county in which their sports club is based. Sports grants are awarded based on a written application of the athlete or his/her or sports club.

#### h) Role and contribution of volunteering

Sports volunteering is a comprehensive area without which contemporary sport can be hardly imagined. The idea to devote one's time to others summarises the values inherent in sport. Sports volunteering builds positive social attitudes and contributes to the exchange of experience and skills that may be useful in future professional work. Sports volunteering is a phenomenon that changes dynamically. In Poland, its development was accelerated by the holding major sports events over the past years. It is now difficult to imagine a smooth organization of such events, even local ones. without the cooperation of qualified volunteers. Sports volunteering covers not only contributing to the smooth organization of sports events (one-time volunteering) but also support provision to regular activities of sports organizations, including popularization of physical activity in the long-term (permanent volunteering). The ability to switch smoothly between the two forms of volunteering has a decisive impact on the operation of many sports clubs and sport-oriented activity centres. The development of sports volunteering is characterized by quantitative as well as qualitative aspects. An organization that uses services of volunteers should take care of improving their qualifications to prepare them for their roles. The same, though to a lesser extent, applies to one-time volunteers who perform short-term tasks. Therefore, non-formal education of volunteers must be an important element supporting sports volunteering in Poland. An important issue related to sports volunteering is to reconcile the different professional roles.

The size of this age group is systematically growing, and due to the previously described risks concerning professional work discontinuation, its active participation in sports volunteering can be a good method of making it active in the society. The main activities within this direction of intervention are: - promotion of the idea of sports volunteering. also as a stage in the training of coaches, instructors, referees and other sports staff members; - promotion of active participation in sports voluntary work of senior persons; -





dissemination of the practice of improving volunteers' qualifications in sports organizations; - research work and development of recommendations related to sport volunteering in Poland, including assessment of obstacles to smooth transition from one-time volunteering to permanent volunteering; - dissemination of good practices in volunteering in sporting events of various types; collecting and disseminating good practices in the field of reconciling professional work and voluntary work in sports and recreation.

#### i) Levels of participation in physical activity

- Over fifty percent of Poles do not practice any physical activity. Compared to other European Union countries, few people in Poland declare they practice non-sporting physical activity, also that related to travelling (commuting).
- Poles usually undertake physical activity occasionally or on weekends; they rarely practice physical activity on regular basis. Poles rarely use the offers of sports clubs or private providers, although in the latter case the trend is increasing.
- The integrating role of sport in Poland is underemphasized. Physical exercise is practiced primarily at or close to home, in non-organized forms, most often on one's own. Poles rarely indicate spending time in a group as a motivation to practice sport.
- A lower degree of physical activity is recorded among residents of rural areas, persons with disabilities, unemployed persons, persons with basic-level education and women. However, it should be remembered that in some cases, those persons' lower physical activity in leisure time is closely linked to the fact that they perform work which requires physical effort (e.g. work in the agricultural sector), or to the socio-demographic position of a given group (a greater proportion of senior persons in rural areas).
- In recent years, the availability of sports offers close to home, and the activity of local authorities and organizations in this field, were perceived as significantly better. However, the assessment of offers of local sports organizations and sports clubs is still lower than the average assessment in the European Union. Notably, the lack of organized activities is often indicated as the reason for non-participation in sport among school children.
- The most frequently indicated obstacle to practicing sport or recreation is the lack of time. In this regard, particular attention should be paid to persons aged 20-49: over fifty percent of this group indicate the lack of time as the main reason for their physical inactivity. Therefore, this group is often characterized by sedentary lifestyle.
- The most popular sports and leisure activities are cycling and swimming. Further, men prefer team sports while women prefer individual sports that improve fitness level and body shape (aerobics, fitness exercises, jogging and dancing).
- There is an increased prevalence of obesity and overweight in all age groups. Physical activity practiced regularly for a sufficient time is, apart from a healthy diet, a factor that prevents overweight and obesity.

# j) Trends

Among the main challenges facing persons who have qualifications to carry out educational activities. are:

- w unification of the education system throughout the country.
- ensuring equal opportunities to individual regions through appropriate allocations of funds.

In reality, the number of persons with proper qualifications should be gradually increased to ensure a greater choice of well- qualified persons, better opportunities for further education and implementation of a





harmonized training programme. In striving to unify the educational model, it is necessary to determine the starting point in terms of demand and the achievable level of supply

#### k) Sports infrastructure

Sport facility – a self-contained, compact compound comprised of outdoor amenities and buildings, intended for sports.

Stadium – a facility designed for sports events and sports training, with open or roofed spectator stands, one or more large playing fields, a perimeter running track and other sports amenities, as well as auxiliary structures

Sports field – a field of appropriate size, shape and surface, designed for training, competition and games in various sports.

#### 1) Stadiums

In 2014, athletes had 2 386 stadiums at their disposal (6.6% more than in 2010), of which:

- 57.3% were football stadiums,
- 39.4% were multifunctional stadiums,
- 2.2% were track and field stadiums,
- 1.1% were speedway and rugby stadiums.

Stadiums were most numerous in southern Poland, in the following voivodeships: Podkarpackie (14.8%), Małopolskie (10.3%), Śląskie (8.6%) and Dolnośląskie (7.2%); Podlaskie, Świętokrzyskie and Lubuskie voivodeships had the fewest stadiums (2%, 2.9% and 3.2%, respectively).

91.4% of stadiums had stands with up to 3000 seats. 5 stadiums have a capacity of more than 40 000 seats (2 football stadiums and 3 multifunctional stadiums).

Of all stadiums more than 63% were approved stadiums, 31% were adapted to the needs of disabled athletes and 41% were adapted to the needs of disabled spectators. The great majority (80%) of stadiums are new facilities that were built or thoroughly modernized after 2000. More than 3% of the country's stadiums date back to before 1960.

#### Large sports fields

The number of fields designed for large field sports (6 594) is more than three times that of stadiums. Almost all (99.3%) large sports fields are football fields. 10.3% of all fields have artificial surfaces. As with stadiums, large sports fields were concentrated in the southern voivodeships — Dolnośląskie (12.5%), Małopolskie (10.1%), Śląskie (8.1%) and Podkarpackie (7.7%). 70% of these fields were built or thoroughly modernized after 2000. In addition, according to the Educational Information System, there are as many as 9.5 thousand school football fields in Poland.





#### Other sports fields

In 2014, there were also the following sports fields of other types:

- 🕸 2 643 small sports fields (basketball, handball, beach handball, volleyball and beach volleyball),
- 2 704 multi-purpose sports fields,
- 2 039 tennis courts.

The largest numbers of such facilities were located in Wielkopolskie (12.4%) and Dolnośląskie (9.5%) voivodeships, while Podlaskie voivodeship had the least number of such fields (2.2%).

#### Sports halls

In 2014, there were 567 large multi-purpose sports halls in Poland (size 44 x 22 m or larger), i.e. 106 more than in 2010. Mazowieckie voivodeship had the largest number of such halls (72) while Podlaskie had the smallest number (12). Smaller sports halls (other than school sports halls) were also most numerous in Mazowieckie voivodeship (12.4%) while Świętokrzyskie voivodeship had the smallest number of such facilities (2.1%).

Most (71%) sports halls were either built or thoroughly modernized after 2000. Just like with sports fields, the number of school sports halls by far exceeds the number of non-school sports halls. If one considers all sports halls (i.e. both school and non-school sports halls), as many as 90.2% of them are school facilities. The number of large sports halls with more than 3000 seats was 25.

#### Swimming pools

In 2014, there were 521 non-school indoor swimming pools and 236 school indoor swimming pools. The majority (56.7%) of swimming pools were sized 25x12 m or more. There were 12 swimming pools sized 50x12 m. Voivodeships with most indoor swimming pools included Śląskie (16.5%) and Mazowieckie (13.7%). Those with the smallest number of such facilities included Lubuskie (1.8%) and Podlaskie (2.8%). In the non-school category, 56.8% swimming pools had stands and 71.8% were adapted to the needs of disabled swimmers. Most of these facilities (77%) were either built or thoroughly modernized after 2000.

#### 2) Winter sports infrastructure

In 2014, fans of winter sports had at their disposal 250 artificially cooled ice rinks, 18 ski jumping hills, 12 luge tracks, 7 speed skating tracks, 262.4 km of alpine ski pistes and 676.8 km of cross-country skiing tracks. The ice rinks were scattered throughout Poland, with the largest numbers situated in Mazowieckie (18%) and Śląskie (15.2%) voivodeships. Ski pistes and ski jumping hills were concentrated in the southern voivodeships (Podkarpackie, Małopolskie, Śląskie, Dolnośląskie), where the hilly terrain is suitable for these sports. Cross-country skiing tracks were mostly located in the southern voivodeships (Dolnośląskie (39%), Małopolskie (33%), Śląskie (7.5%), Podkarpackie (1.9%)) and in Warmińsko-Mazurskie (12.8%) and Podlaskie (3.9%). As compared with 2010 r., there was a 51.5% increase in the number of ice rinks, including indoor ice rinks (from 63 to 77). The length of ski pistes also increased (by 52 km, mainly in Małopolskie and Śląskie), as well as the length of cross-country skiing tracks (by more than 500 km, mainly in Dolnośląskie, Małopolskie, Podlaskie, Śląskie and Warmińsko-Mazurskie). Winter sports facilities are relatively new, as 86% of them were built or thoroughly modernized after 2000.





#### Table 5) Basic data on selected types of sports facilities

	1998	2010		2014		
Type of facility		non-school	school	non-school	school	
Stadiums	1657	2238	-	2386	-	
Large sports fields	4976	5478	-	6594	-	
Small sports fields						
Basketball	4143	424	7903	745	6997	
Handball	3903	161	7435	189	6174	
Volleyball	4435	784	8907	654	3250	
Tennis courts	2796	1568	1209	2039	1131	
Sports halls	11124	1881	17063	2060	18921	
Including sports halls larger than 36mx18m	744	814	1702	953	-	
Indoor swimming pools	500	433	221	521	236	
Artificially cooled ice rinks	83	165	-	250	-	

#### Indicators:

- 1. Roofed swimming pools (including at schools) per 10,000 residents: 0.2.
- 2. Sports halls and gyms (including at schools) per 10,000 residents: 5.5.
- 3. Large stadiums and sports fields (without ones at schools) per 10,000 residents: 2.3.

# Polish sports associations in 2017

In 2017, there were 67 Polish national sports associations and 581 regional sports associations. That year, Polish national sports associations nominated 10665 national team members. The following associations had the largest numbers of national team members: Polish Volleyball Association (1199), Polish Olympic Taekwondo Association (694) and Polish Swimming Association (594). In total, 13,643 43 athletes were registered in the Polish Sports Associations.

Poland's national team members								
total	juniors	women						
10665	5384	4309						

There were 44.6 thousand umpires registered with Polish sports associations, 3.7% of whom were international class umpires. Women comprised 20.6% of all umpires and 20.9% of all international umpires. The sports with the largest numbers of umpires were: shooting (22.2% of all umpires), football (19.9%) and track and field sports (7.7%).

In 2017, the Polish national teams at World Championships comprised 1927 athletes who won 354 medals. In 2017, they won 113 gold medals, 97 silver ones and 144 brown ones in world championships. Most of the medal were won in the following sports: sports dance (76 medals). ju-jitsu (35 medals) and kick-boxing (29 medals).





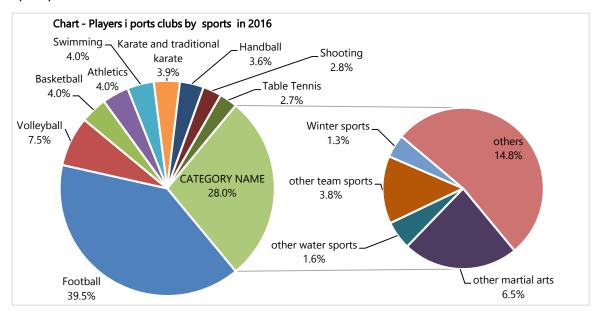
#### Sports clubs in 2016

Specification	2016
Sports clubs	14 858
Members (in thousand)	1 020
Actively participating in sport: (in thousand)	1 030
including:	
women	260
persons up to 18 years of age	735
Coaching personnel	54 516
coaches	24 652
instructors	21 103
others	8 761

In 2016, regions (voivodeships) with the largest numbers of sports clubs included Śląskie (10.2% of the total number of clubs), Mazowieckie (10.1%) Wielkopolskie and Małopolskie (9.6% each). Voivodeships with the smallest numbers of sports clubs included Lubuskie, Podlaskie and Świętokrzyskie (3.3%, 3.0% and 2.5%, respectively).

In 2016, sports clubs had a total of 1019,6 thousand members and trained 1030.2 thousand people (a 12.1% increase vs. 2014). As in previous years, males dominated clearly (74.8%) among those practising sports in clubs. As always, youngsters under 18 were the dominant group of athletes (71.3%). The share of girls among youth practicing sport was similar to the share of women among adults practicing sport and achieved 28.4%. 51.2% of all persons practicing sport in sports clubs were registered with national or regional sports associations.

Team sports are the most popular sports in Poland (58.4% of all athletes) and football is the single most popular sport (40.8%). 44.7% sports clubs had a football team. 46.7 had a team either in football, in indoor football or in beach football). More clubs offering this sport (64.2%) were located in rural areas, yet the number of athletes was higher in cities (by 7 percentage points). Football dominated among men and was played by only 5.8% of women.







Volleyball ranked second (7.5% of all athletes; and 7.8% including beach volleyball). Volleyball was slightly more popular among women who made up 53.8% of the athletes. More persons (68.5%) practicing this sport lived in cities. Similarly as in the previous years, the other sports attracting the largest shares of athletes (after volleyball) were basketball, swimming and track and field sports (4% each) and karate (3.9%).

In 2016, 54.5 thousand coaching staff members worked in sports clubs (including volunteers). Only 16.4% were women. Coaches accounted for 45.2%, sports instructors for 38.7% and other persons conducting sports activities for 16.1%. On average, there were 5.3 training staff members (coaches, instructors and non-licensed staff) per 100 athletes in Polish sports club.

The number of athletes per 1000 people in Poland in 2016 was 27, i.e. more than in 2014 (24). As in previous years, that number was highest in Podkarpackie voivodeship (36) and lowest in Świętokrzyskie voivodeship (18).

#### Participation in sports and physical recreation in 2016

Specification	То	tal	of the total number						
			М	en	Women				
	total	of which regularly / often	total	of which regularly / often	total	of which regularly / often			
		<u> </u>	in % of giv	en group	<u> </u>	T			
TOTAL in 2012	45.9	20.3	48.8	21.8	43.3	18.9			
TOTAL in 2016	46.4	21.7	48.4	22.8	44.6	20.6			
		Α	ge						
5–9	70.9	49.9	73.7	54	67.9	45.6			
10–14	82.2	60.2	84.8	64.7	79.4	55.5			
15–19	71.2	40.7	72.6	42.4	69.7	38.9			
20–29	59.3	27.7	61.2	30.1	57.3	25.2			
30–39	53.4	21.2	53.3	21.2	53.4	21.2			
40–49	42.4	15.6	42.4	15.7	42.4	15.6			
50–59	35.2	10.1	32.1	7.7	38	12.3			
60 and over	25.1	10.6	27.7	10.1	23.2	10.9			
	The hig	ghest educati	onal level co	mpleted		T			
Completed level: primary or without school education	46.9	31	53.5	37.2	41.3	25.8			
Lower secondary	67.6	36.6	66.1	35.6	69.2	37.7			
Basic vocational	31.1	9.1	32.3	10	29.2	7.9			





Post-secondary and												
secondary	46.9	18.7	50.9	19.8	43.6	17.9						
Tortion	61.7	29.1	64.8	31.5	F0.6	27.6						
Tertiary	61.7		<u> </u>	31.5	59.6	27.6						
Place of residence												
Urban areas	49.3	24.1	52.3	25.7	46.6	22.6						
Town by size in	43.5	24.1	32.3	23.7	40.0	22.0						
thousand:												
500 and over	52.8	27.3	56.4	30.3	49.8	24.6						
200–499	50	23.8	52.8	27.1	47.4	20.9						
100–199	48	22	51.9	25.1	44.8	19.4						
20–99	48.5	25	50.9	25.3	46.2	24.7						
less than 20	48.1	21.8	51.2	22.5	45.4	21.3						
Rural areas	42.1	18	42.7	18.7	41.5	17.3						
		Physical abil	ity of persons									
Abled	48.2	22.7	50.4	24	46.2	21.5						
Disabled	28.1	11	27.5	11.3	28.6	10.8						
with degree of disability:												
significant	17.1	4.3	21.1	4.2	13.6	4.4						
moderate	29.8	12.5	28.7	10.9	31	14.2						
slight	28.3	9.1	22.6	10.5	32.5	8.1						
children with a disability certificate	62.6	37.3	60.8	48.3	64.4	25.8						
	Natu	re of professio	nal work perfo	ormed								
Sitting work without physical effort required	60.5	27	61.3	27.8	59.8	26.5						
Work requiring physical effort	43.7	15.4	45.3	15.6	41.5	15						
Work requiring intense physical effort	35.6	10.9	36.5	11.7	32.1	7.4						
Su	bjective assess	ment of the o	verall fitness (p	hysical conditi	ion)							
Very good	70.6	46.6	71.8	47.8	69.1	45.1						
Good	54.1	22.6	52.9	21.3	55.4	23.8						
Average	34	10.5	32.8	9.5	34.9	11.3						
Bad	11.4	3	13.8	1.9	9.9	3.7						
Very bad	6.3	1.7	8.4	2.4	4.8	1.3						











#### 4. SPORT LABOUR MARKET STATISTICS

#### a) Sport Satellite Account for Poland for 2012

The Sport Satellite Account for Poland for 2012 is a continuation of the study on the economic dimension of sport, contained in the report Sport Satellite Account for Poland for 2006 and in subsequent sport satellite accounts for 2008 and 2010.

The Sport Satellite Account for Poland for 2012 uses the same methodology as the previous sport satellite accounts for Poland. The methodology of sport satellite accounts has been developed with a significant participation of Poland in the works of the European Commission's Expert Group on the Economic Dimension of Sport.

Results of Sport Satellite Accounts for Poland for the years 2006. 2008. 2010 and 2012 demonstrate middle-level contribution of the sports sector to GDP and to employment as compared with other European countries that draw out sport satellite accounts (see Table below).

#### **Sport Satellite Accounts in Europe:**

	Austria	Austria	Cyprus	Czech Republic	Portugal	UK	UK	Holland	Germany	Switzerland	Poland	Poland	Poland	Poland
Year surveyed	2005	2013	2004	2006	2010- 2012	2012	2014	2006	2008	2008	2006	2008	2010	2012
Sport's contribution to GDP or sport's added value														
In %	4.9	4	2.4	1.7	2.2	2.1	2.1	1.0	3.3	1.7	1.96	2.23	2.26	2.16
	Employment related to sport													
In %	6.4	5.3	2.2	2.5	2.4	3.5	3.6	1.5	4.4	2.5	1.54	2.12	2.09	2.04

Source: Sport Satellite Accounts: A European Project, 2013. Austria Sport Satellite Accounts, SpEA, 2015; UK Sport Satellite Accounts, 2012, 2014 and 2015; Poland Sport Satellite Accounts 2006, 2008 and 2010.

The estimated value of the sports sector (sport-related GDP) amounted to PLN 35.3 billion in 2012 and accounted for 2.16% of Poland's GDP for that year.

The actual increase of sport-related GDP in 2010-2012 was 1.6%. with an increase of 10% in price levels (by PLN 3.2 billion) over the same time.

In 2012, the number of jobs related to sport accounted for 2.04% of the overall number of jobs, and in relation to 2010 dropped by 0.5 percentage points. The increase in the added value related to sports over the same period means an increase in work efficiency in the sports sector.

In 2012, the value of consumption of sport-related products increased by PLN 3 billion compared to 2010. The value of the exports increased by PLN 1.1 billion and the sport-sector accumulation dropped by PLN 0.5 billion.

The reason for the reduced sport-sector accumulation in 2012 was the completion of many investment projects into sports facilities before EURO 2012, which culminated in the years 2010-2011.

Imports of sports products in 2012 amounted to PLN 3.2 billion (an increase of 0.4 billion compared to 2010), and exports amounted to PLN 5.1 billion.





As concerns the structure of end-user demand for sports products in 2012, the consumption increased by 74%, accumulation by 13% and exports by 13%.

In the sport-related GDP in 2012, the largest contribution was made by services related to facilities construction, education, fitness level improvement and betting. The value of services offered by tour operators also increased significantly in 2012 (by PLN 1 billion), reaching 8% of sport-related GDP in 2012, mainly due to the holding of EURO 2012.

The demand for industrially manufactured sports products in 2012 mainly covered mostly products made of metal, such as motorcycles, bicycles, boats (mainly for export) and other sports equipment.

In the overall sport-related production, the largest shares were held by processing and construction industries, in connection with extensive investments before EURO 2012. In 2012, the shares of processing and construction industries in overall sport-related production were lower, and the dominant category was services related to sport and recreation.

The Sport Satellite Account for Poland for 2012 demonstrated changes in overall sports production and sport-related demand, reflecting the end of the investment boom related to EURO 2012 and the growing significance of sport and recreation services.

#### b) **EUROSTAT** Employment Data

The graphs that follow show workforce data for Poland and the EU as a whole collected through desk research and gathered by EOSE from the European body Eurostat. Data related to "NACE" and "ISCO" were analysed.

#### 1) NACE

NACE is the "statistical classification of economic activities in the European Community" and is the subject of legislation at the European Union level, which imposes the use of the classification uniformly within all the Member States.

NACE is a four-digit classification providing the framework for collecting and presenting a large range of reliable and comparable statistical data according to economic activity.

In terms of NACE codes which data were targeted through the desk research, the goal was to ask for all available data with a 4-digit breakdown as follows:

93: Sports activities and amusement and recreation activities

93.1 Sports activities (3 digits)

93.11 Operation of sports facilities (4 digits)

93.12 Activities of sport clubs

93.13 Fitness facilities

93.19 Other sports activities

The codes under 93 define the organisations whose main business is classified as sport.





#### 2) <u>ISCO</u>

ISCO is the International Standard Classification of Occupations.

The ISCO-08 divides jobs into 10 major groups with sub-groups underneath. For the ESSA-Sport project ISCO 342 is most relevant:

342 Sport and Fitness Workers (3 digits)

- 3421 Athletes and Sports Players
- 3422 Sports Coaches, Instructors and Officials
- 3423 Fitness and Recreation Instructors and Programme Leaders

#### c) Graphical presentation

These graphs cover three areas of content:

#### 1) The first one is about the sport sector itself defined as NACE 93.1.

This section contains information about the size and characteristics of the sport sector. That includes people having an occupation within the sport sector (NACE 93.1) so working in a sport facility, a sport club, a fitness centre etc. These persons can have a sport-specific occupation (e.g. a coach) but also a non-specific sport occupation (e.g. manager).

#### 2) The second section focuses on the specific sport occupations defined as ISCO 342.

Through this section you will find information about the number of people having a sport occupation (ISCO 342).

The ISCO category 342 includes all sport and fitness workers which means professional athletes and sport players, sport coaches, sport instructors, sport officials, fitness instructors, programme leaders etc.

# 3) The third section highlights the best possible estimation of the total employment in the sport sector.

In order to obtain such data, we have been able to identify the number of people having a sport occupation (ISCO 342) within the sport sector (NACE 93.1) and those having a sport occupation outside the sport sector (Other NACE codes). This was the only condition to be able to produce a total figure for the employment in the sport sector.

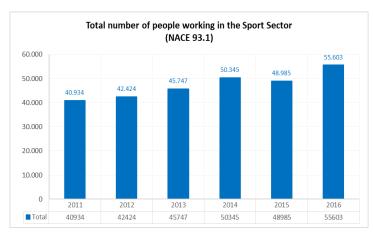
Finally, a graph is included underlining the proportion of the total employment in the sport sector compared to the overall total employment in your country.

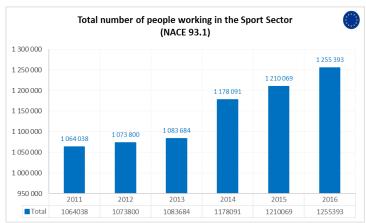


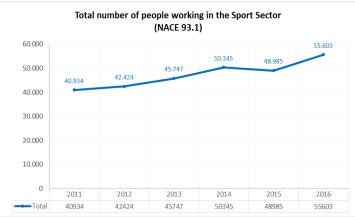


#### d) Total number of people working in the sport sector (NACE 93.1)

#### 1) Overall picture. total NACE 93.1

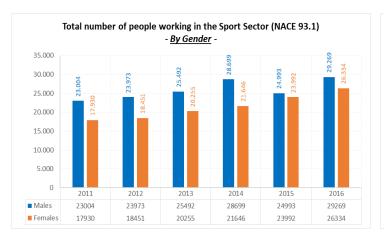


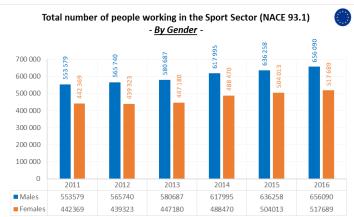






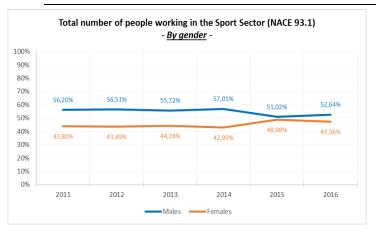
# 2) Total number of people working in the sport sector (NACE 93.1) - by gender

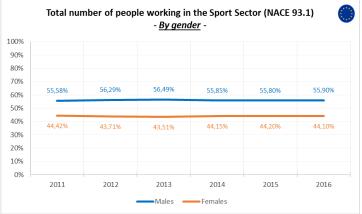




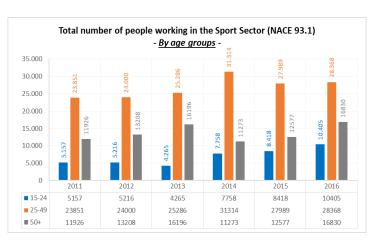


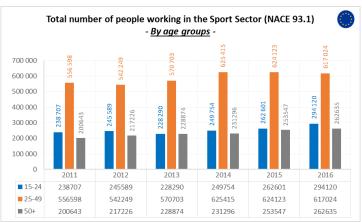


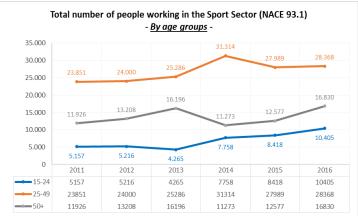


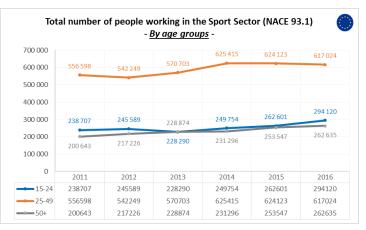


# 3) Total number of people working in the sport sector (NACE 93.1) - by age groups





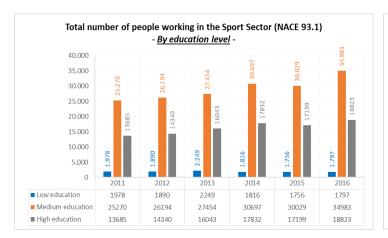


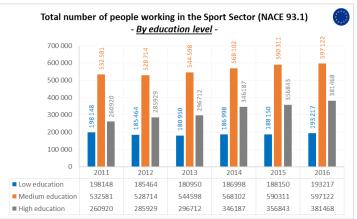


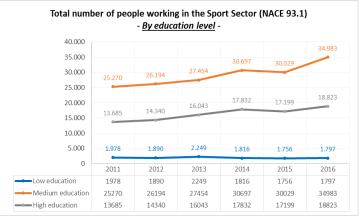


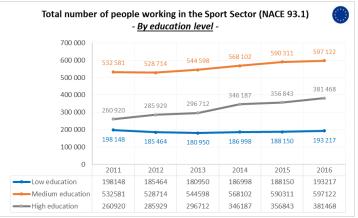


# 4) Total number of people working in the sport sector (NACE 93.1) - by level of education

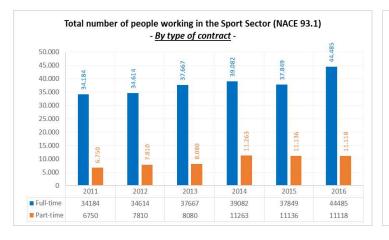


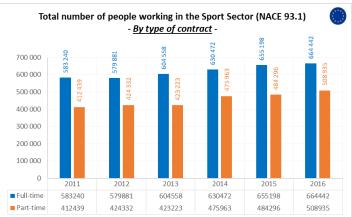






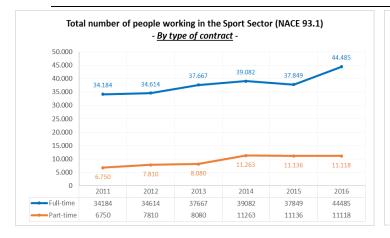
# 5) Total number of people working in the sport sector (NACE 93.1) – by type of contract

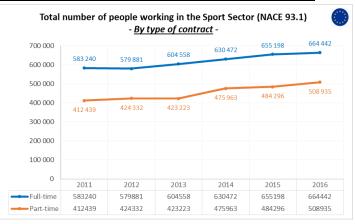




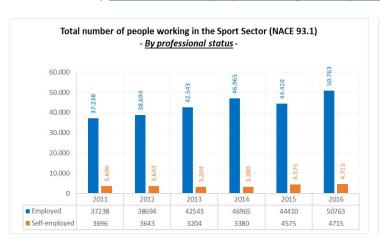


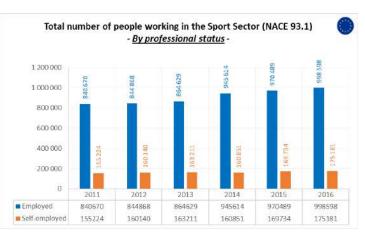


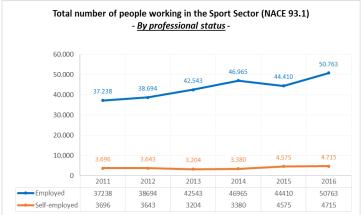


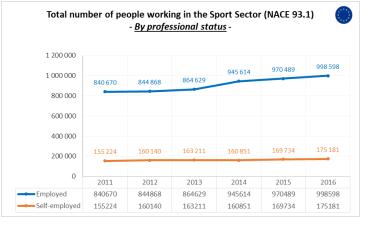


# 6) Total number of people working in the sport sector (NACE 93.1) – by professional status



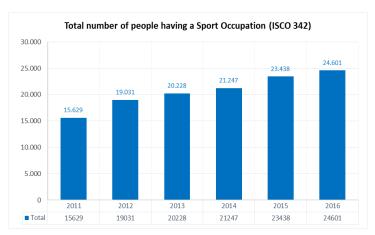


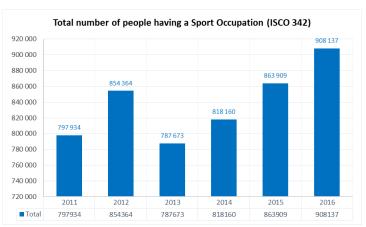




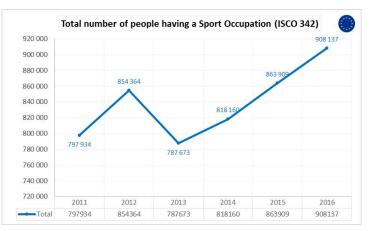
# e) Total number of people having a sport specific occupation (ISCO 342)

#### 1) Overall picture. total ISCO 342



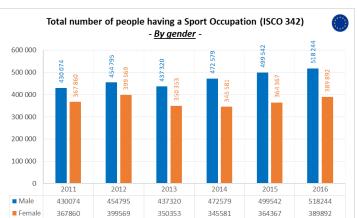






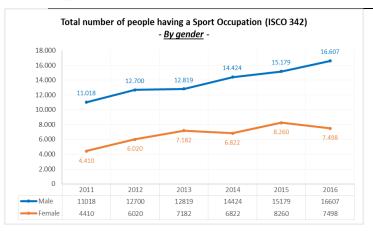
# 2) Total number of people having a sport specific occupation (ISCO 342) - by gender

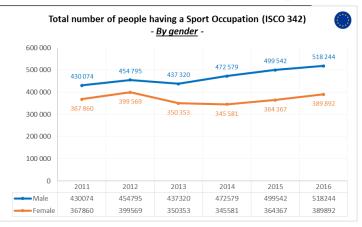


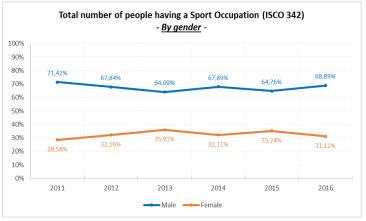


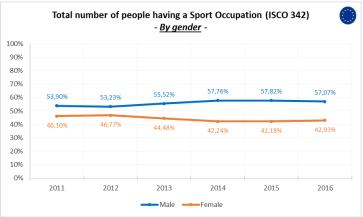




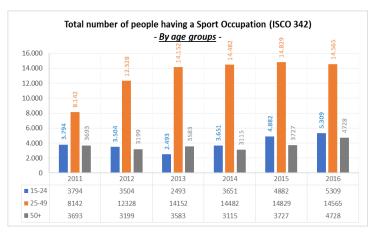


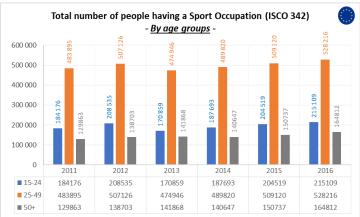


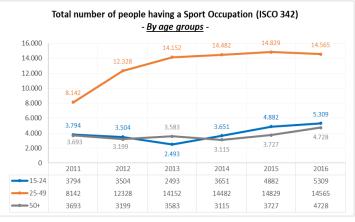


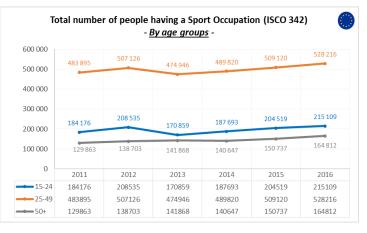


#### 3) Total number of people having a sport specific occupation (ISCO 342) - by age groups



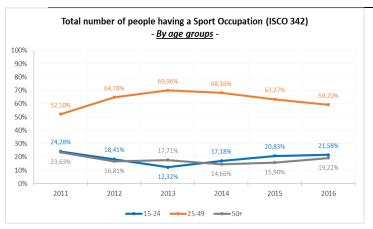


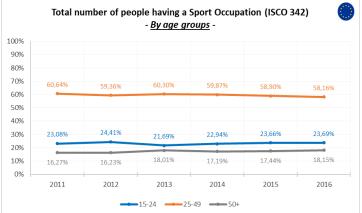




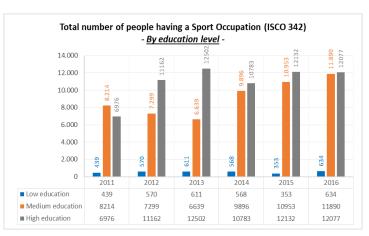


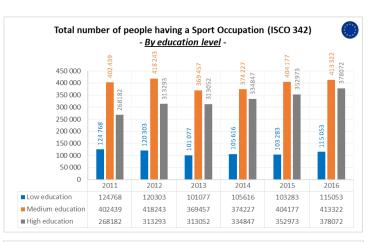


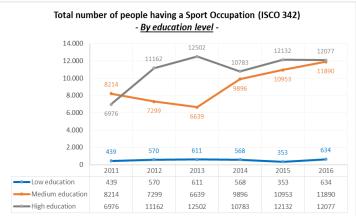


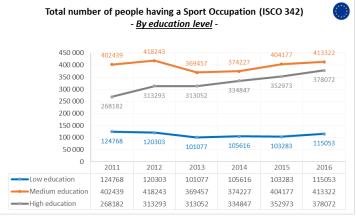


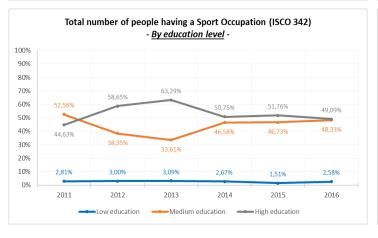
## 4) Total number of people having a sport specific occupation (ISCO 342) - by level of education

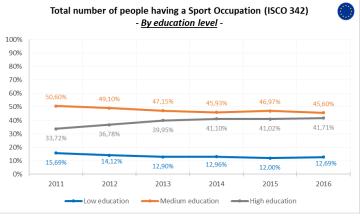








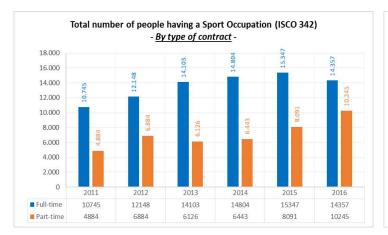


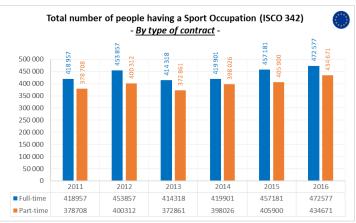




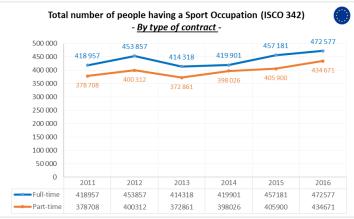


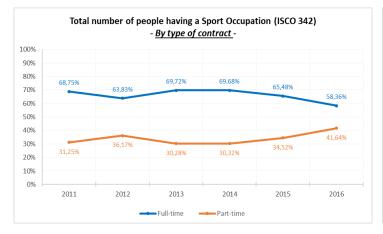
## 5) Total number of people having a sport specific occupation (ISCO 342) – by type of contract

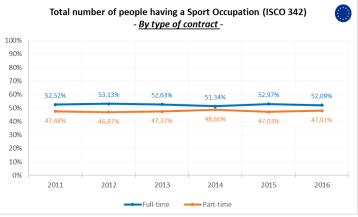












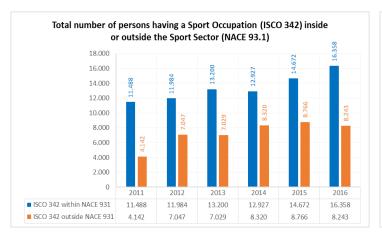


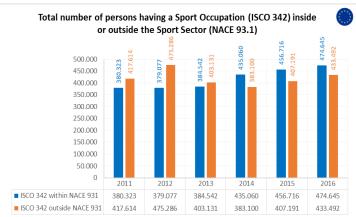


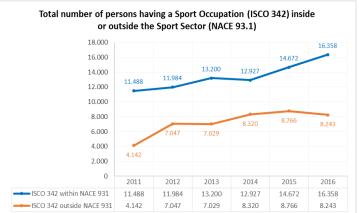
## f) Total employment in the sport sector (NACE 93.1 + ISCO 342 outside NACE 93.1)

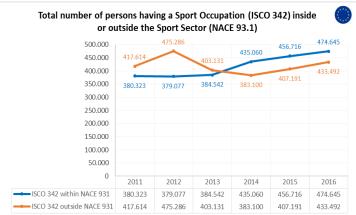
## 1) Total number of people having a sport occupation within or outside the sport sector

The figures below correspond to the total number of people having a sport occupation (ISCO 342) within the sport sector (NACE 93.1) and those having a sport occupation outside the sport sector (Other NACE codes). We have been able to cross-tabulate NACE versus ISCO and this was the only condition to be able to calculate a total figure for the employment in the sport sector.





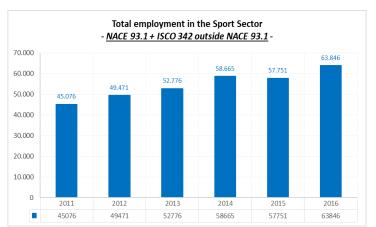


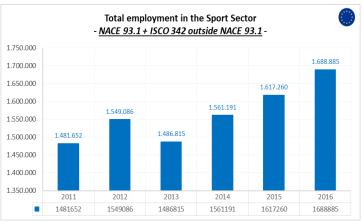


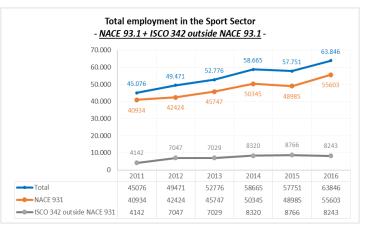


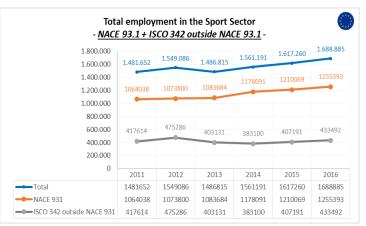


## 2) Total employment in the sport sector (NACE 93.1 + ISCO 342 outside NACE 93.1)

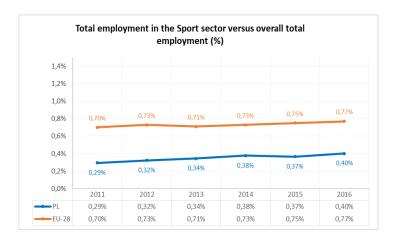








## 3) Total employment in the sport sector versus overall total employment (%)







#### g) 4.7 National statistics based on data by Statistics Poland

#### Preamble:

The authors are aware that the data included herein originates from various sources.

The data herein below, due to the lack of a clearly indicated data collection methodology recognized by all countries, contains data compilations originating from:

Eurostat – the Eurostat data originate from a survey that is conducted in all EU member states based on a consistent methodology. The survey is conducted among respondents aged 15+ who represent households. Employed persons are defined as those who, in the surveyed week, performed any work that lasted for at least one hour and generated income, regardless of the formal employment status of those persons (the survey may include e.g. a referee employed for a specific match, under a contract of mandate or a specific-task contract.

#### Data in Table 1 takes into account:

- results of a survey conducted by Statistics Poland and covering enterprises in which employees are understood as persons employed within an employment relationship (employment contract, appointment, nomination or election to a specific position; persons working under a contract of mandate or a specific-task contract are not included) or within the enterprises' internal company relationship, as well as employers and self-employed persons. The data cover enterprises with over 9 employees.
- data estimated based on data of the ZUS Social Insurance Institution and considered an additional source of information on persons working under a contract of employment (full-time and part-time), self-employed persons and persons on maternity or parental leave, regardless of their size the employing enterprise.

The Eurostat and Statistics Poland surveys differ not only in terms of the method of data collection and scope, but also in terms of the definition of employee.

Therefore, there also exist differences in the results of those surveys. According to Eurostat data (p. 26), the number of employees in NACE 93.1 is 55,603 (including 47.4% women), while according to the Statistics Poland survey conducted based on the enterprise-focused method (entities with over 9 employees) the number of employees (p. 39) is 23,261 (including 48.8% of women).

The report also takes into account an additional source of information i.e. data on persons covered by social insurance, as provided by the ZUS Social Insurance Institution. The number of employees was estimated based on employee's definition used in the Statistics Poland surveys but applying to all employees, regardless of the size of the enterprise by which they are employed. The number of employees (p. 40) is then 34,442 (including 47.1% women).





# Table 1. Employment in Poland in 2011-2017 by selected classes indicated in the PKD 2007 business activities classification

(applies to business entities with over **9 employees** and to public-sector entities regardless of the number of employees. Persons working in their own agricultural farms, and in state-budget entities from the national defence and public safety sectors not included)

and parameter, extended the management of the parameter o								
ITEM	2011	2012	2013	2014	2015	2016	2017	
93.1 Sport related activities	20 252	20 642	20 995	21 867	22 393	23261	23108	
93.11 Operation of sports facilities	13 636	14 118	14 264	15 061	15 594	16012	16116	
93.12 Activities of sport clubs	604	613	603	559	571	649	604	
93.13 Fitness facilities	935	989	1 251	1 338	1 406	1596	1318	
93.19 Other sports activities	5 077	4 922	4 877	4 909	4 822	5004	5070	
85.51 Sports and recreation education		1 809	1 903	1 979	1 961	2097	2087	

Source: Statistics Poland – form no. GUS Z-06

Data in the tables refer to entities' head offices and main employing units, for business entities with over **9 employees** and to public-sector entities regardless of the number of employees. Persons working in their own agricultural farms, and in state-budget entities from the national defence and public safety sectors not included.

Data estimated based on ZUS Social Insurance Institution statistics relating to persons working under a contract of employment (full-time and part-time), persons who are self-employed people and those on maternity/parental leave.

	by gender			
PKD (Polish Classification of Business Activities)	2016			
	Women	Men		
93.1 Sport related activities	16227	18215		
93.11 Operation of sports facilities	7810	8926		
93.12 Activities of sport clubs	1535	2029		





93.13 Fitness facilities	2990	1670
93.19 Other sports activities	3892	5590
85.51 Sports and recreation education	4320	6023

	by working time			
PKD (Polish Classification of Business Activities)	2016			
	full time	part time		
93.1 Sport related activities	30991	3451		
93.11 Operation of sports facilities	15261	1475		
93.12 Activities of sport clubs	3350	214		
93.13 Fitness facilities	3702	958		
93.19 Other sports activities	8678	804		
85.51 Sports and recreation education	7317	3026		

	by age				
PKD (Polish Classification of Business Activities)	2016				
	< 25	26-49	50+		
93.1 Sport related activities	2793	20367	11282		
93.11 Operation of sports facilities	1055	9365	6316		
93.12 Activities of sport clubs	270	2104	1190		
93.13 Fitness facilities	820	3297	543		
93.19 Other sports activities	648	5601	3233		



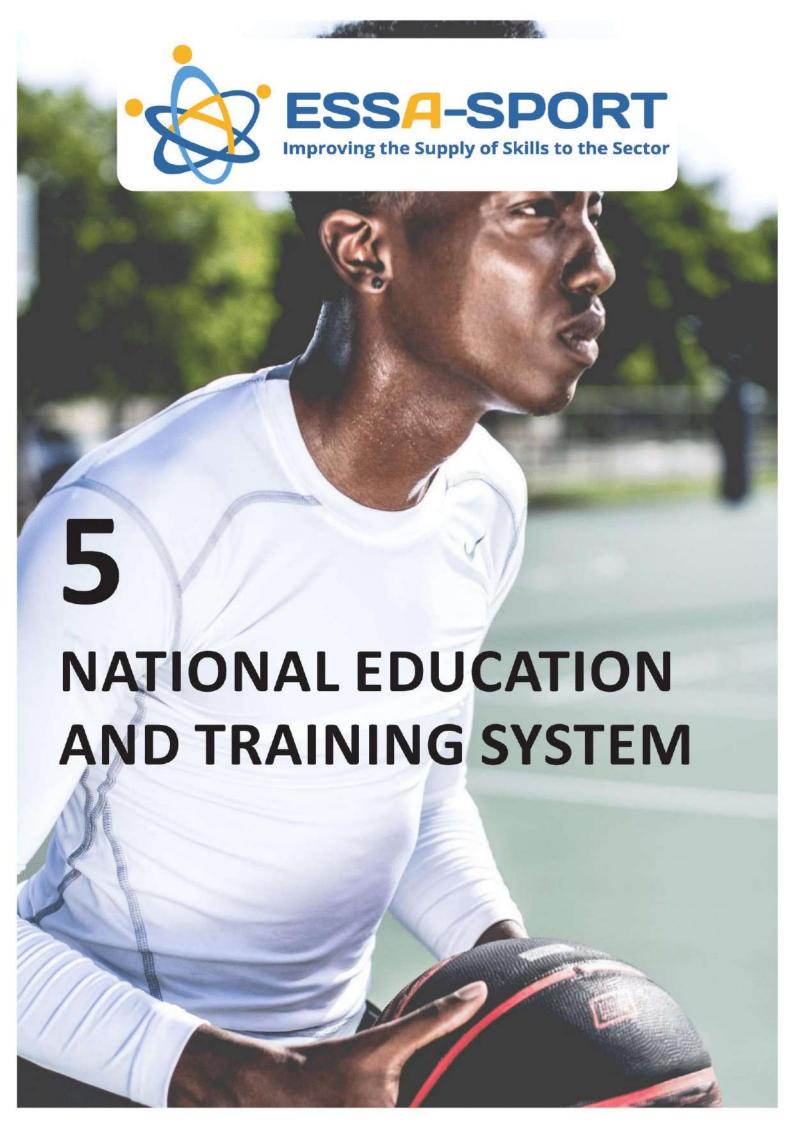


		1	
85.51 Sports and recreation education	738	7414	2190

	by level of education							
	2016							
PKD (Polish Classification of Business Activities)	primary and incomple te primary	lower second ary	vocation al	general secondar y	secondar y vocation al	post- second ary	bachelor's degree, engineer's degree, bachelor in economy degree, or equivalent	MA/MSc degree, doctor of medicine degree, or equivalent; PhD degree
93.1 Sport related activities	4281	75	5343	4329	6438	4340	2852	6784
93.11 Operation of sports facilities	1542	0	2737	2472	3843	661	1242	4239
93.12 Activities of sport clubs	0	0	1023	572	602	592	421	354
93.13 Fitness facilities	417	0	715	684	700	722	714	708
93.19 Other sports activities	2322	75	868	601	1293	2365	475	1483
85.51 Sports and recreation education	3399	0	466	582	392	3400	321	1783

# h) Conclusions:

- In the reviewed period of 2011-2016, a significant increase in the number of people employed in e sports sector was noted. The growth dynamics was slightly higher than the European average.
- The sports sector employs slightly more men than women, although in the last years there has been a tendency for more equal proportion.
- The largest group of employees (around 60%) are in their middle age, followed by persons over 50 (about 30%). People below 25 make up only about 15% of the sector's employees.







# 5. NATIONAL EDUCATION AND TRAINING SYSTEM

## a) Ministries responsible for education

In Poland, the ministries responsible for education are the Ministry of National Education and the Ministry of Science and Higher Education. The Ministry of Education finances school education tasks, including the improvement of the quality of teaching. On its website, the ministry describes its mission as follows: "We want every pupil, regardless of his/her origin and the financial status of his/her parents, to have access to high quality school and education". The Ministry of National Education is responsible for the stages of education from pre-schools to upper secondary schools. The Ministry of Science and Higher Education, in turn, has responsibility for university-level education and all matters relating to students, universities and scientists.

### b) The system of education in Poland

Eight-year primary school, divided into two stages: grades I - III and IV - VIII

The first stage (grades I-III for children aged 7-10) covers early childhood education. Currently, at the request of parents (legal guardians), teaching of foreign languages, music, arts, physical education and IT may be carried out by primary school education may be started by a child at 6 years of age. Education in grades I-III is carried out in the early-stage teaching form i.e. without division into individual school subjects. One class of pupils usually has one teacher, although specialist teachers.

In Poland, after the reform introduced in 2017, new types of post-primary schools were introduced. Upon their completion and passing the matriculation examination, their graduates may seek admission to universities.

# 1) University education

In Poland, university education at three levels is provided. There first-level courses (bachelor's degree or equivalent) and second-level courses (master's degree); in certain subjects, there are single-level courses up to master's degree or equivalent). Third-level university education i.e. PhD-level courses can be run by universities and by certain institutes of the Polish Academy of Sciences, research institutes or international scientific institutes operating in the territory of Poland. The first-level courses (bachelor's degree or equivalent) last 3 or 4 years; the student gets the title of BA/BSc/engineer or equivalent, which is certified by a relevant diploma that gives entry to second-level university education. The second-level courses last from 1.5 to 2 years and end with the master's degree or equivalent, depending on the subject studied. The master-level diploma gives entry to third-level university education which usually last from 3 to 4 years and lead to obtaining the PhD degree in a specific field of science or art.

In Poland, there are 6 Academies of Physical Education and 2 branch units of such Academies.

## 2) Poland's system of vocational education and practical job training

According to the Polish Classification of Business Activities, there are eight areas in which such education is provided:

- administration and services (A);
- construction (B);
- electricity and electronics (E);
- mechanics, mining and metallurgy (M);





- agriculture, forestry and environmental protection (R);
- tourism and gastronomy (T);
- medical and social services (Z);
- arts (S).

Vocational and technical education is provided by the following types of secondary schools:

- technical colleges
- level 1 vocational schools
- level 2 vocational schools
- job schools for mentally disabled pupils

The curricula, described in the form of expected learning outcomes, include:

- learning outcomes common to all occupations: health and safety at work, starting and conducting sole tradership, foreign language related to the profession, interpersonal and social competences, small team work organization (in technical colleges and post-secondary schools);
- learning outcomes common to specific professions within the given area; as the basis for specific profession/job training;
- learning outcomes relating to the specific profession/job.

Practical job training in Poland is governed by the regulation of the Minister of National Education of 24 August 2017 on on-the-job training (Journal of Laws, item 1644).

## 3) Regional Education Authorities

Public-sector and private-sector schools, up to the matriculation examination level, are supervised by Regional Education Authorities. The Regional Education Inspector, on behalf of the head of the regional-level government, implements tasks and competences in the field of education, as specified in the Act on school education and in other relevant regulations applicable to the region. The tasks may include: 1. supervision over public-sector and private-sector preschools, schools, other education institutions and social welfare schools within a given region; 2. Issuance of administrative decisions on matters indicated in the Act.

# 4) The Polish Qualifications Framework

The Polish Qualifications Framework has eight levels. Each of them is described by way of general requirements in the fields of knowledge, skills and social competences that have to be held by a person who has a qualification at a given level. The unique solution used in Poland is the introduction, apart from general (first-level) characteristics, also the second-level characteristics. The Polish Qualifications Framework covers levels 1-8 in terms of general characteristics.

In Poland, there is a distinction between general qualifications and specific qualifications.

#### Full qualifications:

at level 1 of the Polish Qualifications Framework, qualifications are confirmed by:

- certificate of completion of a six-year primary school;
- certificate of completion of a music school level 1;
- significate of completion of a six-year primary school combining general education and music education





at level 2 of the Polish Qualifications Framework, qualifications are confirmed by:

- certificate of completion of a lower secondary school;
- certificate of completion of an eight-year primary school;

at level 3\* of the Polish Qualifications Framework, qualifications are confirmed by:

- vocational qualification diploma
- 1. issued upon completion of a basic vocational school or upon meeting the requirements laid down in Article 10(3)(2)(a) of the Act of 7 September 1991 on the School Education System.
- 2. issued upon completion of a vocational school level 1, or upon meeting the requirements laid down in Article 10(3)(2)(b) of the Act of 7 September 1991 on the School

Education System and passing the examination approving the qualification in a given profession.

apprenticeship certificate issued upon completion of a basic vocational school or a vocational school level 1 and passing the examination in one of the professions referred to in Article 3(3b) of the Act of 22 March 1989 on Crafts;

at level 4\* of the Polish Qualifications Framework, qualifications are confirmed by:

- ★ vocational qualification diploma
- issued upon completion of a technical school or post-secondary school or upon meeting the requirements laid down in Article 10(3)(2)(d) of the Act of 7 September 1991 on the School Education System.
- 2. issued upon completion of a vocational school level 2, or upon meeting the requirements laid down in Article 10(3)(2)(c) of the Act of 7 September 1991 on the School Education System and passing the examination approving the qualification in a given profession.
- se certificate of completion of an arts school, confirming the qualification achieved in a given profession:
- certificate of passed matriculation examination;

at level 5 of the Polish Qualifications Framework, qualifications are confirmed by:

- teachers' college diploma;
- foreign languages teachers' college diploma;
- 🕸 social welfare college diploma;

at level 6 of the Polish Qualifications Framework, qualifications are confirmed by:

🕸 university diploma – bachelor level or equivalent ;

at level 7 of the Polish Qualifications Framework, qualifications are confirmed by:

university diploma – master's level or equivalent;

at level 7 of the Polish Qualifications Framework, qualifications are confirmed by:

PhD diploma

<sup>\*</sup> exceptions relating to levels 3 and 4 are laid down in the ordinance of the Minister of National Education on the classification of professions



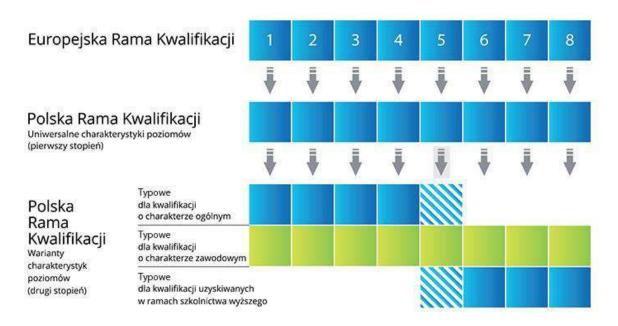


# Partial qualifications:

- qualifications in professions specified in the classification of professions taught in the vocational education system;
- qualifications confirmed by a craftsmanship certificate or apprenticeship certificate but not specified in the Act on the Integrated System of Qualifications, Article 8;
- qualifications achieved as a result of postgraduate university studies;
- sy qualifications achieved as a result of completing other forms of education conducted by universities, scientific institutes of the Polish Academy of Sciences, as well as research institutes;
- system or the university education system;
- market-based qualifications not regulated by the law, awarded by organizations that conduct business activity.

## c) Comparison of the Polish Qualifications Framework to the European Qualifications Framework

The Polish Qualifications Framework provides a reference point for comparing Polish qualifications to those provided for in the European Qualifications Framework (EQF) and, through the EQF, to the qualifications in individual EU countries.



(graph: https://prk.men.gov.pl/polska-rama-kwalifikacji-prk/(access on 12/03/2019))

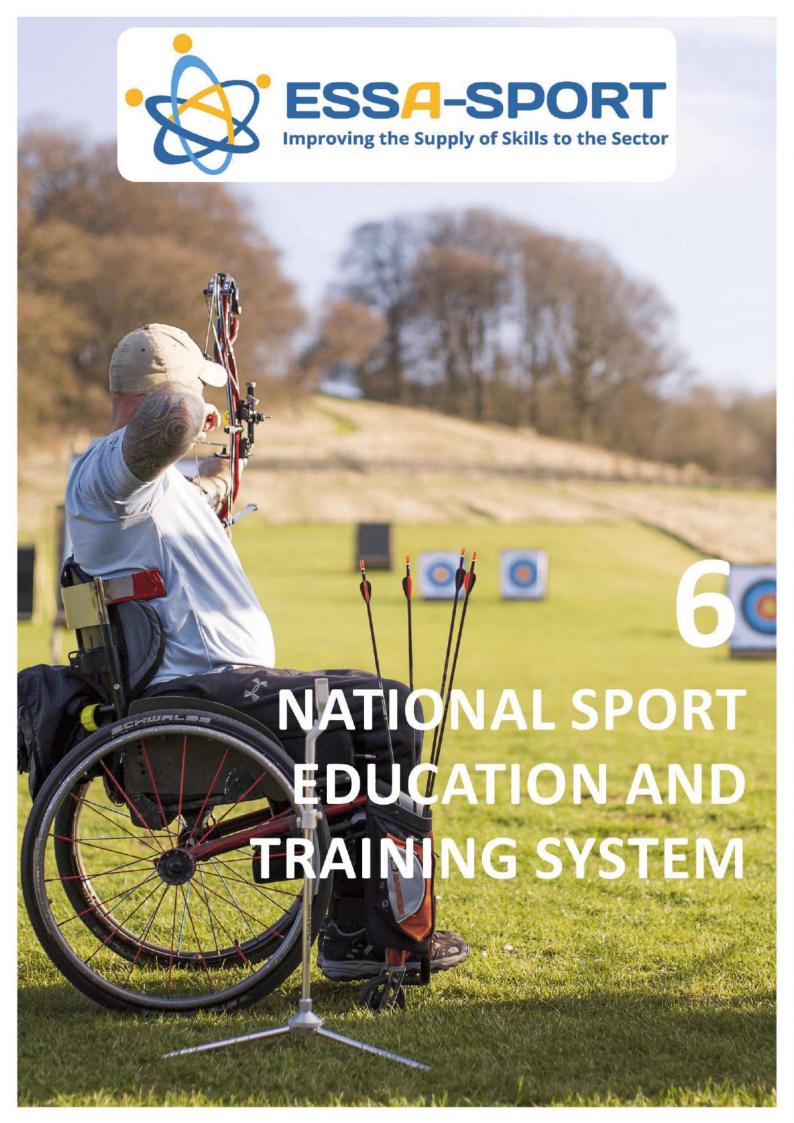
# 1) Non-formal education in Poland

In the European Union, two very broad programmes were implemented in the field of non-formal education: the Youth in Action Programme and the Lifelong Learning Programme, which shape the so-called European educational space. The first programme aims to support non-formal education resulting from activities undertaken by young people in their free time. The programme is addressed to people aged 13-30 and to employees of youth organizations. The latter programme aims to support the implementation of various educational activities, and to broaden European cooperation and exchange in





the field of education. The programme has several components and is targeted at various lifelong learning groups: starting from preschools up to third-age universities.







# 6. NATIONAL SPORT EDUCATION AND TRAINING SYSTEM

The Regulation of the Minister of National Education of 29 June 2017 on forms of conducting compulsory physical education classes (Journal of Laws, item 1322) which entered into force on 1 September 2017, compulsory physical education classes are carried out in the form of regular classes conducted at schools as well as additional classes that may be selected by pupils/students. There are minimum two regular physical education classes per week in primary schools and minimum one class per week in secondary schools. Depending on the actual number of compulsory classes at a given school, there may be two, one or no additional classes. It is the responsibility of the head of the school to propose the additional classes (Article 4(1) of the Regulation). In doing so, he should take into account the pupils'/students' health condition, interests, achievements in a given sport or physical activity, place of residence, the local conditions, the school's sports traditions and staff available. The classes proposed by the school head are subject to consultation with the entity that funds the school, with the school's teachers' council and with the parents' board. The final selection of the classes from among those proposed is made by the pupils/students (if they are underage, the consent of the parents is needed). The classes to choose from are organized by a school and taught by a physical education teacher (it may be another teacher than the one who has regular classes with the pupils/students). Therefore, compulsory physical education is always provided by the school, and other activities are not counted into it.

Every pupil/student who is particularly talented, also in sport, may have an individual teaching programme if so approved by the head of the school. Such cases are regulated by the Regulation of the Minister of National Education of 9 August 2017 on requirements to be met and the procedure to be followed in seeking permission for an individual teaching programme, and the organization of such programmes (Journal of Laws no. 1569). The number of physical education classes for pupils of grades 4-8 of primary schools is 4 per week, and for students of secondary schools is 3 per week.

## a) Sports education in Poland:

- Physical education classes are compulsory in each of the 12 years of education.
- The numbers of physical education classes at individual stages of education is governed by the relevant Regulation of the Minister of National Education.
  - grades 1-3 of primary schools 3 hours per week if the classes are conducted by a physical education teacher;
  - o grades 4-8 of primary schools 4 hours per week;
  - post-primary schools 3 hours per week;
- According to the framework curriculum, at every stage of education physical education classes should serve the purpose of developing the habit of physical activity.
- When conducting the lessons required under the framework curriculum, every school develops its own plan of physical education classes, including extracurricular activities and out-of-school activities.
- The lessons cover four thematic areas:
  - 1. Physical development and fitness improvement.
  - 2. Physical activity.
  - 3. Safety in physical activity.
  - 4. Health education.





#### b) University education

Physical education universities in the cities of Wrocław, Gdańsk. Kraków, Warsaw, Poznań and Katowice provide degree courses in the following areas: physical education, sport, tourism and recreation, physiotherapy, and nutrition. Only master-level courses provide specialization in a given area and professional a title/degree required for future professional work.

The degree courses in sport, offered by the Physical Education University in Warsaw, offer the choice from among the following specializations:

sports coach (in a specific sport)

motor skills development instructor

sports organization manager

sports facility manager

The Physical Education University in Poznań, master-level degree course in physiotherapy – specialization: physiotherapy in sports

The Physical Education University in Wrocław, master-level degree course in physical education – specialization: personal sports coach

The Physical Education University in Kraków, master-level degree course in tourism and recreation - specializations: coaching in recreation; and: SPA centres' management. Sport-related degree courses are also offered by other universities. Physical education can be studied at the University of Szczecin. Physiotherapy can be studied at the Jagiellonian University in Kraków, the University of Rzeszów, and practically at all medical universities across the country. Tourism and recreation can be studied at: the Adam Mickiewicz University in Poznań, the University of Lódź, the University of Silesia in Katowice, the AGH University of Science and Technology in Kraków, the Agricultural University in Warsaw and the University of Economics in Kraków. There are also degree courses that do not engage in physical activity as such, e.g. sports journalism at the University of Wrocław, or sports psychology at the SWPS University.

#### Postgraduate studies

Unlike bachelor-level and master-level university courses, postgraduate university courses are available only in return for payment. The price, depending on the city and the university/college, range from PLN 4,000 to 8,000 per year. Postgraduate courses give the student specialist knowledge and a diploma, but are also an opportunity to develop contacts. Courses at that level are offered by universities across the country. Nutrition in sports can be studied e.g. at: the University of Physical Education in Warsaw, the Medical College in Katowice, the Physical Rehabilitation College in Warsaw, the Private Medical College in Wrocław, and Health Promotion College in Kraków. Sports journalism post-graduate courses are offered by: the University of Warsaw, the Physical Education University in Warsaw, the Physical Education University in Poznań, the Public Administration College in Szczecin. Management in sport can be studied e.g. at: the Warsaw School of Economics, the Physical Education University in Poznan, the Kazimerz Wielki University in Bydgoszcz.

Poland is one of three EU Member States where the profession of a sports coach is regulated (the other two countries are Greece and the Czech Republic), and one of four EU countries where the profession of a sports instructor is regulated (the other countries are Cyprus, the Czech Republic and France). The planned deregulation (popularly and incorrectly called discontinuation of limitations) of the profession of sports instructor is going to open the market to people who have necessary qualifications to practice the





profession (e.g. qualifications obtained during their own sports career) and who will not be required to attend subject-specific training. As in the case of other professions, qualifications of sports coaches and sports instructors should be verified by the employer (in this case a sports club or a sports association). The planned deregulation will open employment possibilities for employers who e.g. will be able to employ coaches from other countries (whose qualifications in many cases are not recognized under the current Polish legislation). At present, there are difficulties in assessing qualifications acquired abroad, and classifying them in compliance with the national requirements regarding training and examinations. Such difficulties relate in particular to persons who are not nationals of European Union Member States or countries with which Poland has not signed bilateral international agreements on mutual recognition of qualifications. Qualifications-related requirements for sports coaches and sports instructors are determined by relevant Polish national sports associations such as the Polish Football Association, the Polish Tennis Association, the Polish Volleyball Association, etc.

In Poland there are also centres and schools which provide non-formal adult education. Such learning paths may lead to obtaining a qualification if it is not included in the Integrated Qualifications Register. Until full implementation of the integrated qualifications system, non-formal education shall mean all education and training programmes other than those conducted under legislative acts that regulate the school education and university education systems (i.e. those within the scope of formal education). After the implementation of the new system based on the Polish Qualifications Framework, non-formal education will mean all education and training programmes which do not lead directly to obtaining a qualification included in the Integrated Qualifications Register.

National sports associations in Poland, within their internal budgets, also train volunteers within their training programmes.

An example is the Polish Football Association's Volunteering Programme

It is a programme that trains volunteers for various football events, from the Polish national team's matches to grassroots-level initiatives. Each event requires conducting specific tasks and thus — specific skills in many fields. The volunteers take part in tournaments even at the level of World Championship or European Championships.

The training services market in the sports sector is fragmented and dominated by small and micro-scale companies whose share in the market (which includes public-sector entities) amounted to 86% in 2014.

87% of the training operators are private-sector entities. Most of them specialize in personal development training. The training companies are usually located in regions' largest cities. There is a large rotation of training operators in the market.

The Integrated Qualifications System describes, categorizes and collects various qualifications in the single commonly available register. The solution is aimed at increasing the education level of human resources in Poland and at ensuring skills and qualifications recognition in both Polish and foreign labour markets.

The Integrated Qualifications Register is a public database of all qualifications included in the Integrated Qualifications System. The full list of qualifications, including their descriptions as well as the scopes of knowledge and skills required of candidates seeking individual qualifications, is available at: www.rejestr.kwalifikacje.gov.pl

On 15 January 2016, the Act of 22 December 2015 on the Integrated Qualifications System came into force. It introduced the Integrated Qualifications System which it is a response to changes ongoing on the labour market and in the economy. As experience of other European countries shows, the introduction of

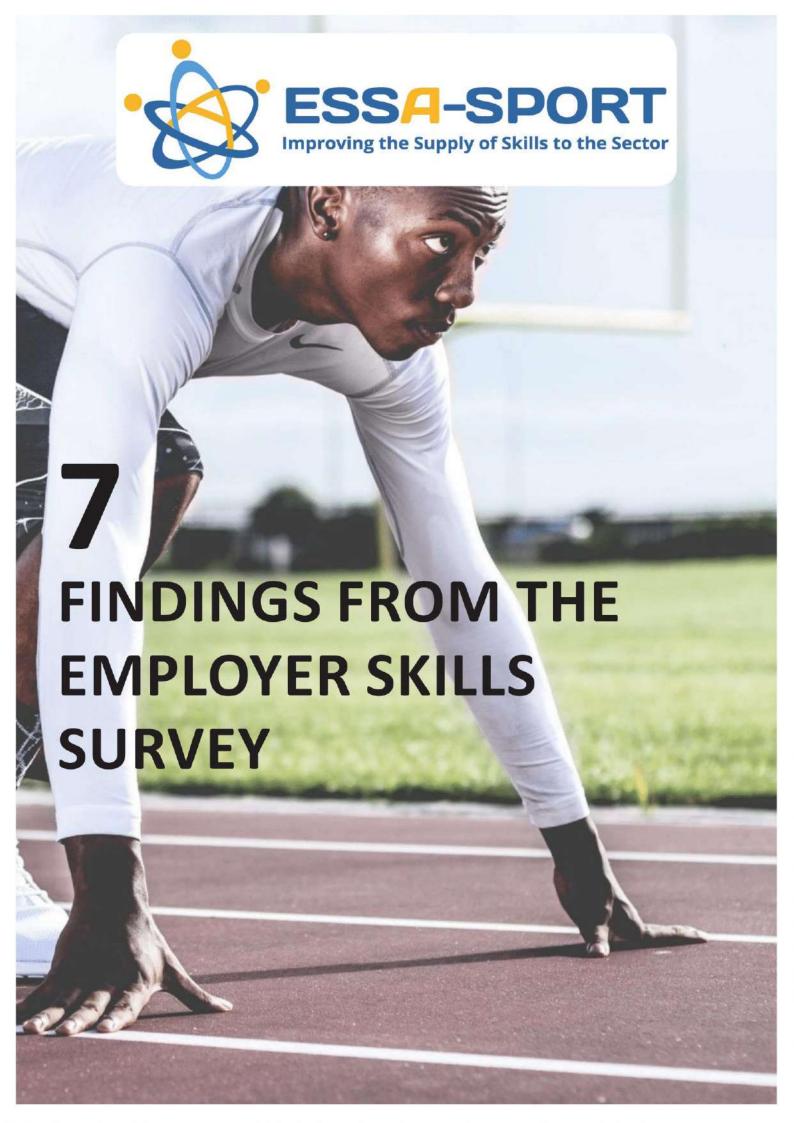




a system based on the qualifications framework will lead to increasing the number of people interested in formal recognition of their competences and in improving their qualifications. This will improve their professional situation and their stability on the labour market. In Poland, qualifications are awarded:

- within the school education system and the university education system.
- by sector-specific associations and organizations that operate under a variety of regulations

Some qualifications achieved outside the school education system and the university education system meet high standards, but not all of them.







# 7. FINDINGS FROM THE EMPLOYER SURVEY

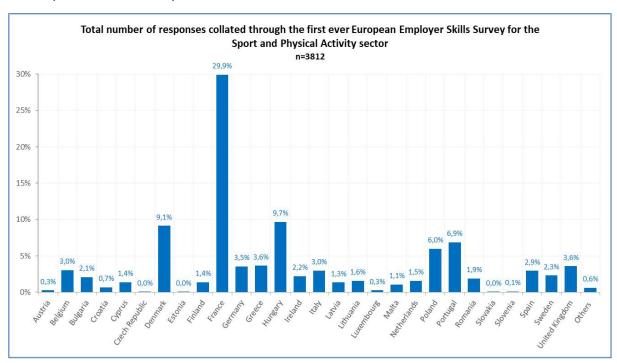
## a) Some Headline Results from the ESSA-Sport Employer Skills Survey for Poland

What follows is a summary of ESSA-Sport Employer Skills Survey results for Poland with some notes comparing the Polish results with those from the wider European Survey. Please note that, in making these comparisons, the Polish responses are included amongst those in the wider European Survey.

## b) The Polish Sample

Broadly speaking, the results for Poland are fairly similar in many, but not all, key areas, to those in the full EU survey. However, the profiles of the two samples have some differences.

228 responses (6.0%) were received from Poland: the fifth highest number of responses. Based on the relative population sizes of the 28 EU members, Poland might have been expected to provide about 7.4%, so this response rate is broadly in line.



## c) Poland's Respondent Profile

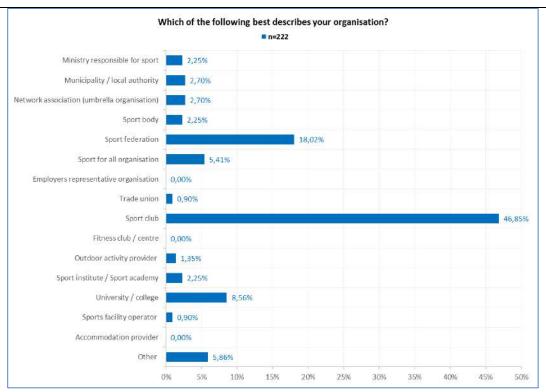
### 1) Types of Organisations in the Polish Sample

The Polish top six responses came from:

- Sport Federations (18%)
- ♦ Sport for All Organisation (5.4%)
- ★ Municipality/Local Authority (2.7%)
- Network organisations (umbrella organizations) (2.7%)





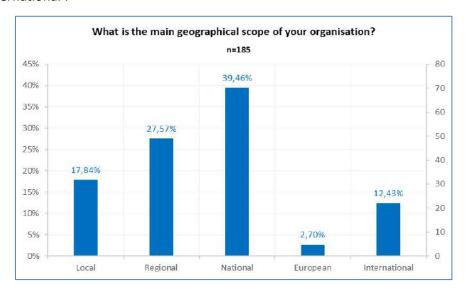


This contrasts with the European survey as a whole:

- ★ Sports Clubs (44%)
- ★ Sports Federations (20%)
- ★ Municipalities (6%)
- \$\square\$ Fitness Clubs (5%)

# 2) Scope of Respondent's Organisation in the Polish sample

39.5% of Poland's respondents reported themselves as 'National'. 27.6% as 'Regional. 17.8% as 'Local'. 12.43% as 'International'.

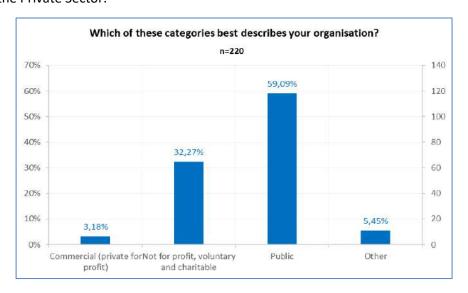






This compares with the European sample where 38.6% reported themselves as 'Local', and most of the remainder were split evenly between 'Regional' (27%) and 'National' (27%) with very small numbers describing themselves as 'European' or 'International'.

## 3) Respondents' Organisational Categories (Not for Profit, Public and Private Sectors)



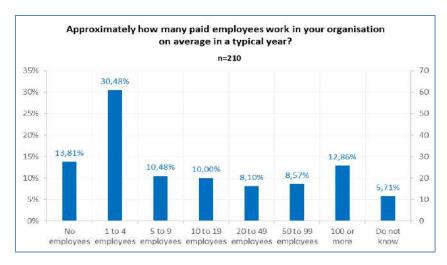
This contrasts sharply with the European sample where the balance was:

- \$ 62% of respondents were from the Not for Profit, Voluntary and Charitable sector.
- 18% represented the Public Sector
- 13% the Private Sector.

Thus the Polish sample showed a greater representation from the public sector than the EU28 survey as a whole.

## 4) Size of Respondents' Organisations by Number of Paid Employees

The largest proportion of Poland's responding organisations employed 1-4 paid employees (30.5%). The next highest (13.8%) had no paid employees. 12.9% employed 100+. 10.5% employed 5-9. 10% employed between 10-19.



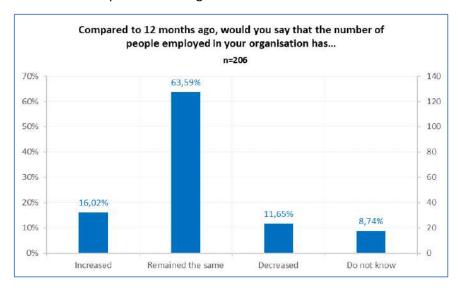




There were some similarities with the European sample where the largest proportion of responding organisations employed between 1-4 paid employees (29%). The next highest (24.6%) employed no paid workers at all. Only 8.7% employed more than 100 paid employees.

## 5) Organisational Growth/Shrinkage

₹ 79.6% of Polish respondents reported their organisation had remained the same or grown in the last 12 months. 11.7% reported shrinkage.

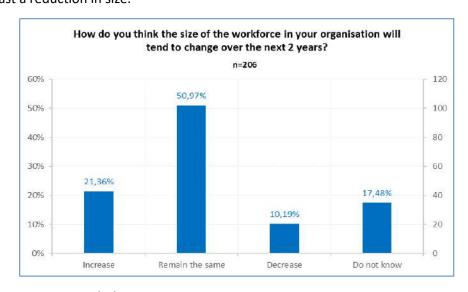


In the European survey as a whole:

87% reported their organisation had remained the same or grown in the last 12 months. Only 8.8% reported shrinkage.

## In the Poland survey:

\$\frac{1}{2}\$ 72.3% expected their organisation to remain the same or grow in the next two years. 10.2% forecast a reduction in size.



# In the European survey as a whole:

\$ 81% expected their organisation to remain the same or grow in the next two years. 7.6% forecast a reduction in size.

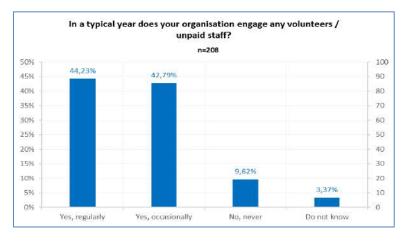




This would suggest Polish respondents are slightly less optimistic about the future than the EU as a whole.

## 6) Deployment of Volunteers

44.2% of Polish respondents reported that they engaged the services of volunteers on a regular basis. 42.8% said they did so occasionally. 9.6% reported that they never engaged volunteers.

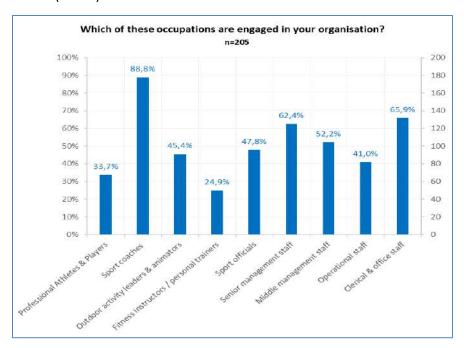


This is rather different to the European survey as a whole where 58.4% of respondents reported that they engaged the services of volunteers on a regular basis. 24% said they did so occasionally. Only 14.6% reported that they never engaged volunteers. This could be a result of the EU survey containing a higher number of Sports Clubs compared to the Polish sample.

## 7) Top Five Types of Occupations Engaged

The top five occupations employed in Poland were:

- ★ Sports Coaches (88.8%)
- Clerical and Office Staff (65.9%)
- Senior Management Staff (62.4%).
- ★ Middle Management (52.2%)
- \$\square\$ Sports Officials (47.8%)





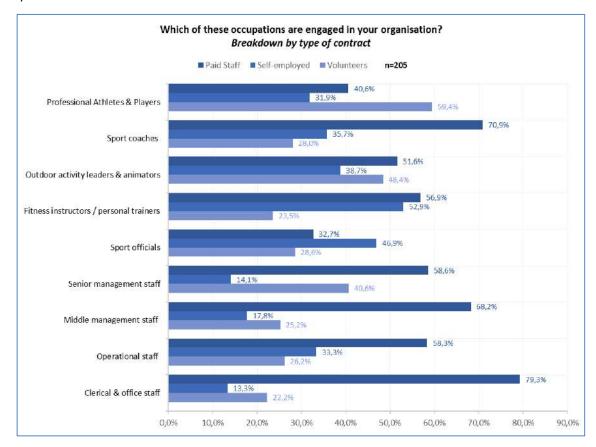


This is broadly similar to the European survey results which were:

- Clerical and Office Staff (70.5%)
- ★ Senior Management Staff (57.7%)
- ★ Middle Managers (52.1%)
- ★ Sports Officials (48.9%).

## 8) Types of Employment Contract

In almost all Polish occupations, staff were paid (as opposed to self-employed or volunteers). The exceptions were Professional Athletes and Players (59.4% Volunteers as opposed to 40.6% paid and Self-Employed 31.9%) and Sports Officials (46.9% self-employed as opposed to Paid 32.7%, and Volunteers 28.6%).



Here there are differences with the European sample where, with the exception of Management, Operational Staff, Clerical Workers and Fitness Instructors, most contracts were voluntary. This could be attributed to the relatively high number of Sports Clubs in the EU sample as a whole.





# d) **Skills Maps and Training Priorities**

## 1) Introduction

The following section covers skills needs for eight occupations. In each section there are three graphs.

The first graph provides a list of skills/attributes relevant to the occupation and the level of importance which the respondents attached to each.

The second graph shows the same list of skills/attributes and percentage of respondents who felt these skills/attributes were Weak and in Need of Improvement.

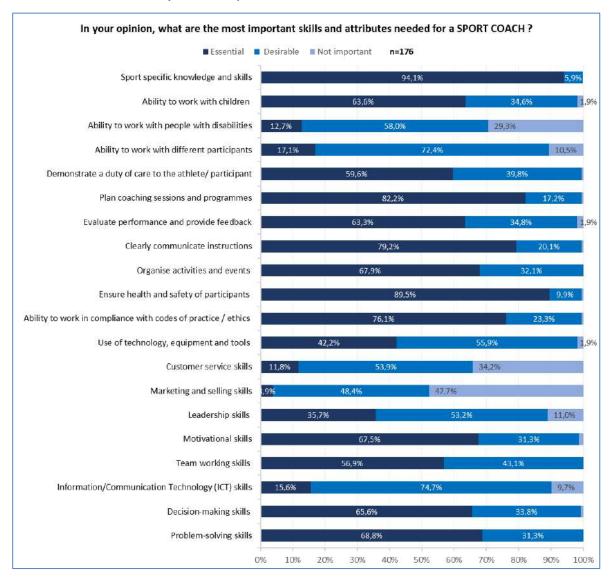
The third graph attempts to balance the other two by showing those skills/attributes which were judged to be most important when multiplied by the percentage level of weakness/in need of improvement. The third graph is necessary to show where the real training priorities lie. Some skills/attributes are shown as very weak/in need of improvement, but they are judged by the respondents as not important. There would be little point in prioritising training activities for these. It is more effective to concentrate on those which have a high level of importance and judged to be weak/in need of improvement.





## 2) Occupation 1: Sports Coach

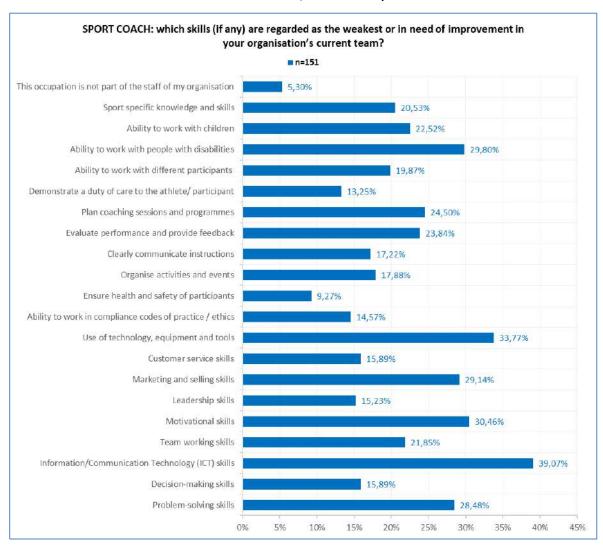
#### Sports Coach: Skills/Attributes by Level of Importance







#### Sports Coach: Skills and Attributes as Levels of Weakness/In Need of Improvement







## **Sports Coach: Skills and Attributes as Training Priorities**

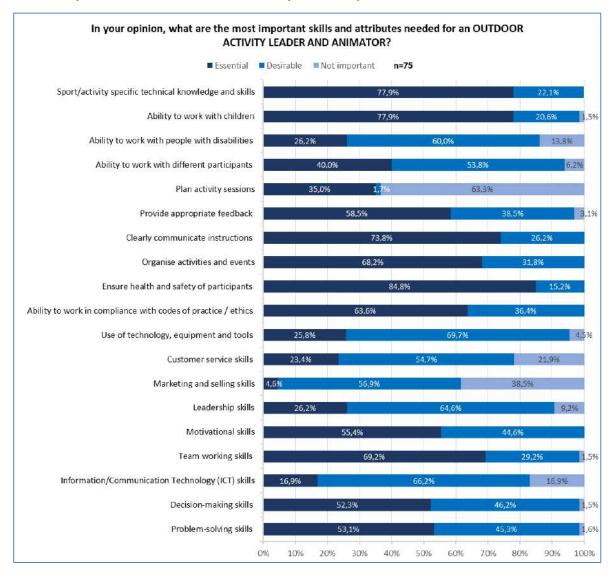






# 3) Occupation 2: Outdoor Activity Leaders/Animators

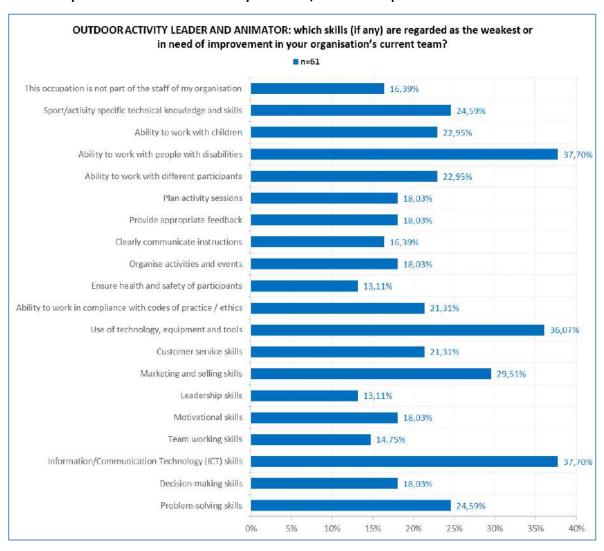
#### Outdoor Activity Leader/Animator: Skills/Attributes by Level of Importance







## Outdoor Activity Leader: Skills and Attributes by Weakness/In Need of Improvement







## **Outdoor Activity Leader: Skills and Attributes as Training Priorities**

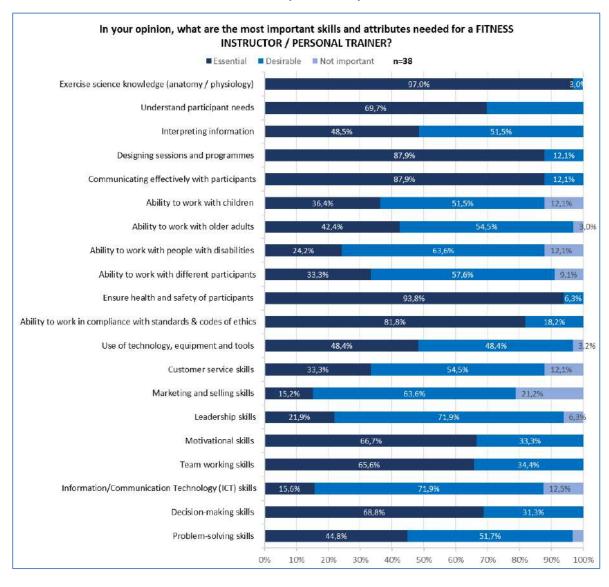






## 4) Occupation 3: Fitness Instructor/Personal Trainer

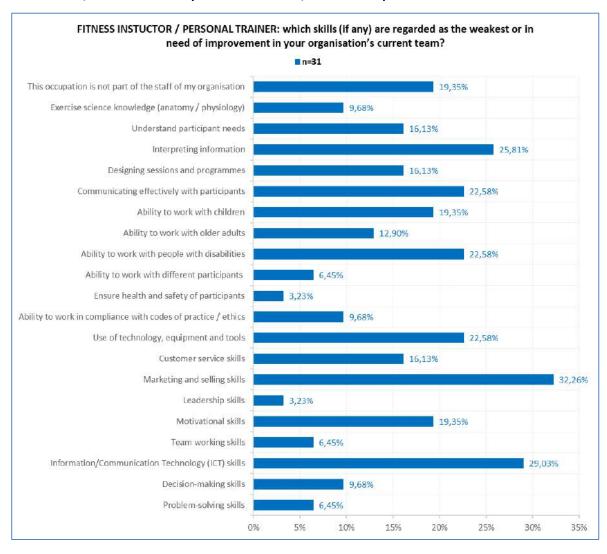
#### Fitness Instructor/Personal Trainer: Skills/Attributes by Level of Importance







#### Fitness Instructor/Personal Trainer by Level of Weakness/In Need of Improvement







#### Fitness Instructor/Personal Trainer: Skills and Attributes as Training Priorities

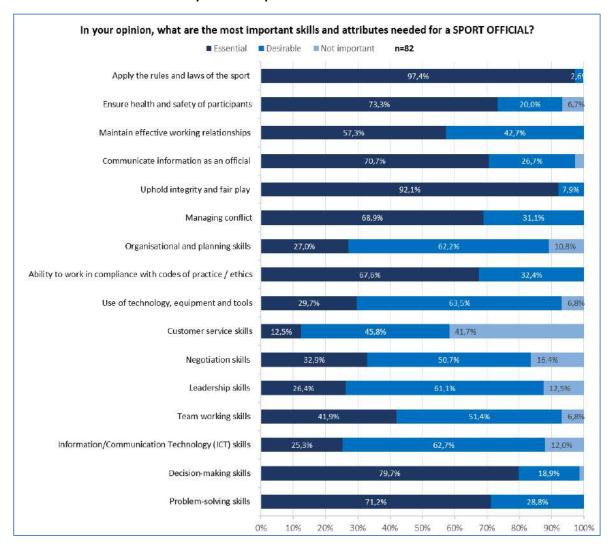






## 5) Occupation 4: Sports Official

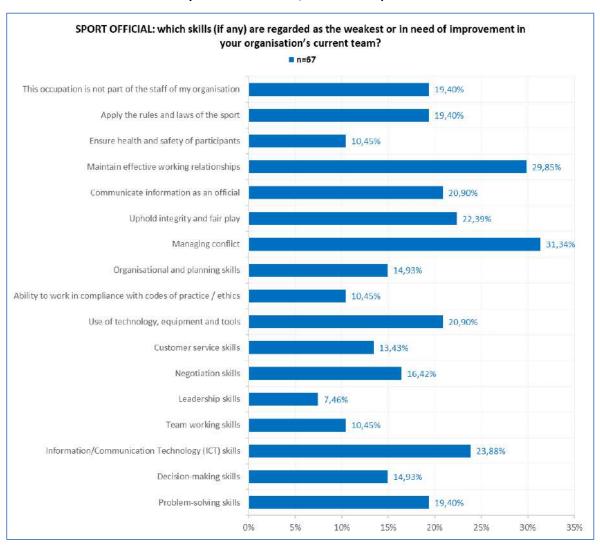
## Sports Official: Skills and Attributes by Level of Importance







#### Sports Official: Skills and Attributes by Level of Weakness/In Need of Improvement







## **Sports Official: Skills and Attributes as Training Priorities**

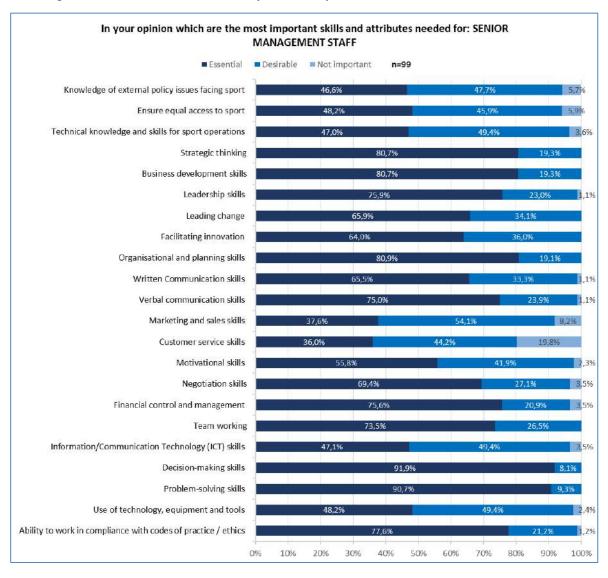






## 6) Occupation 5: Senior Management Staff

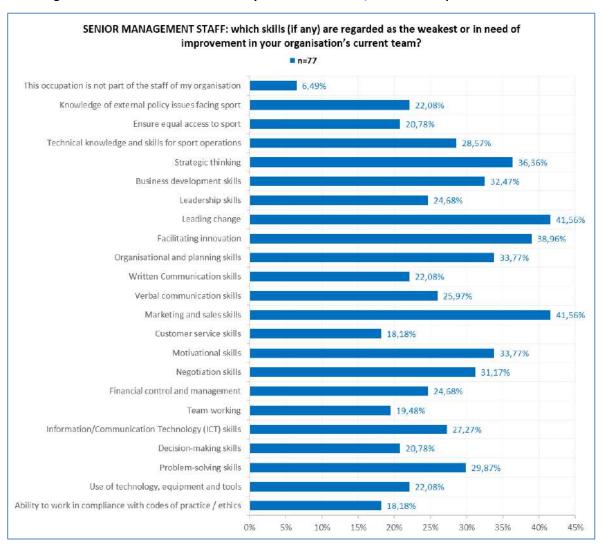
#### Senior Management Staff: Skills and Attributes by Level of Importance







#### Senior Management Staff: Skills and Attributes by Level of Weakness/In Need of Improvement







## Senior Management Staff: Skills and Attributes as Training Priorities

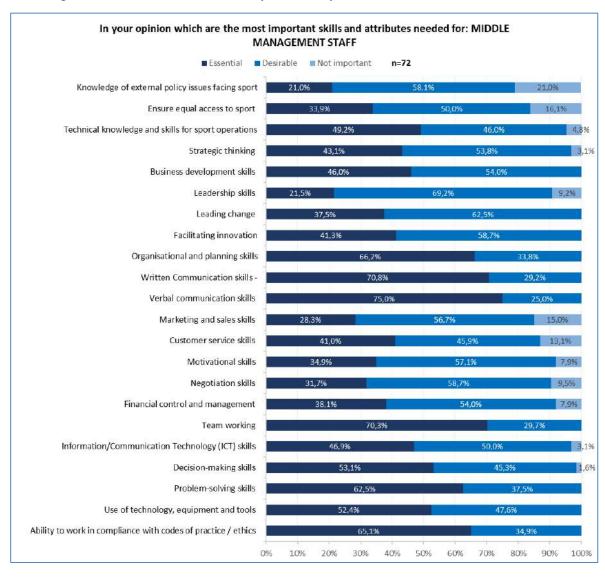






### 7) Occupation 6: Middle Management Staff

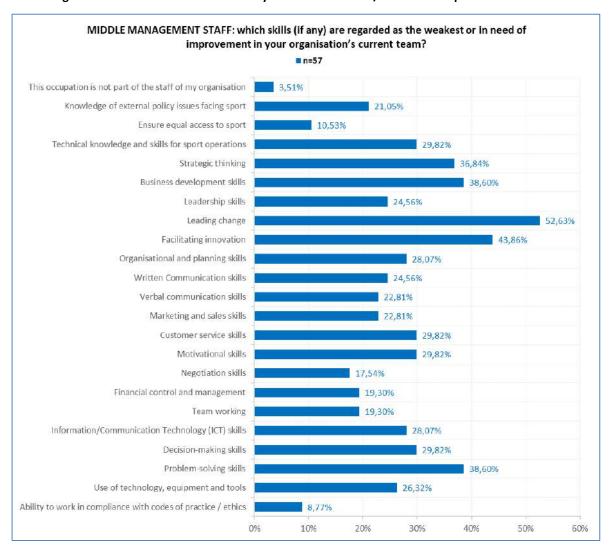
#### Middle Management Staff: Skills and Attributes by Level of Importance







### Middle Management Staff: Skills and Attributes by Level of Weakness/In Need of Improvement







#### Middle Management Staff: Skills and Attributes as Training Priorities

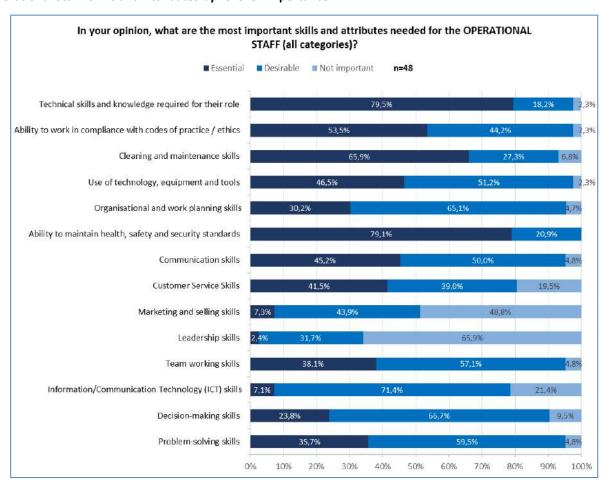






## 8) Occupation 7: Operational Staff

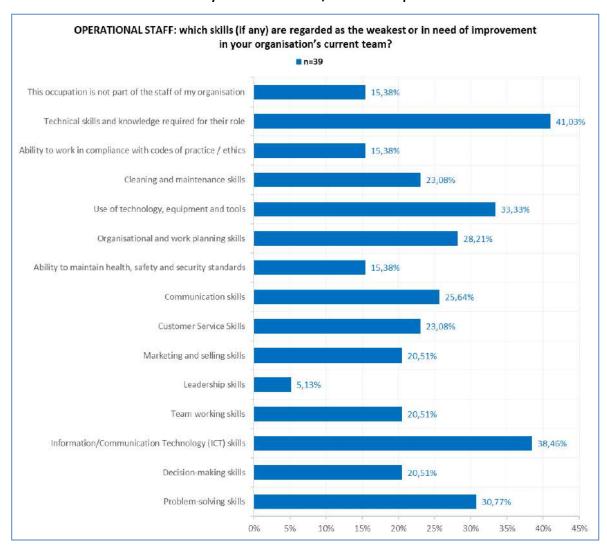
## Operational Staff: Skills and Attributes by Level of Importance







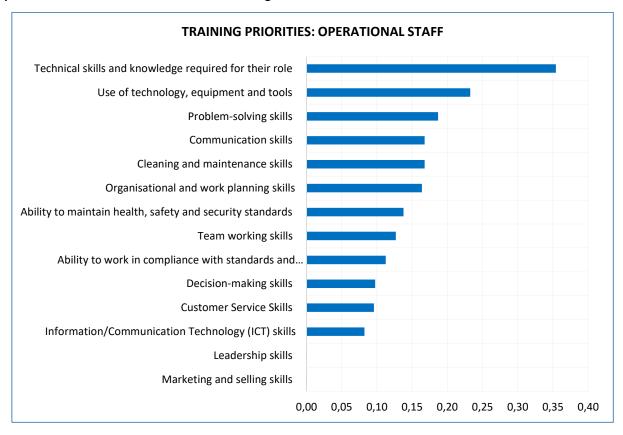
#### Operational Staff: Skills and Attributes by Level of Weakness/In Need of Improvement







## **Operational Staff: Skills and Attributes as Training Priorities**

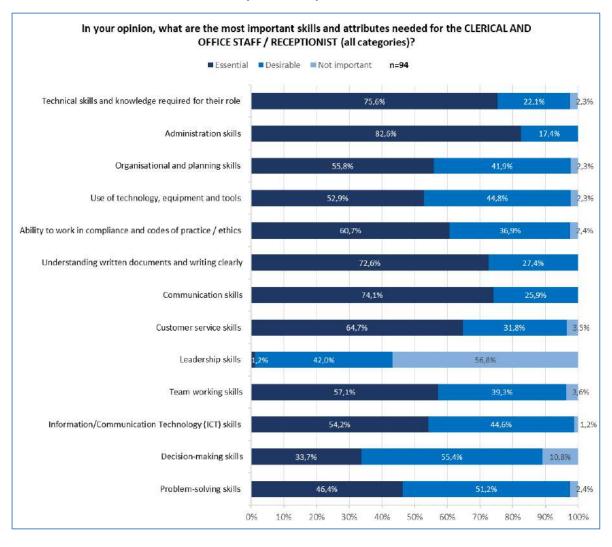






## 9) Occupation 8: Clerical and Office Staff

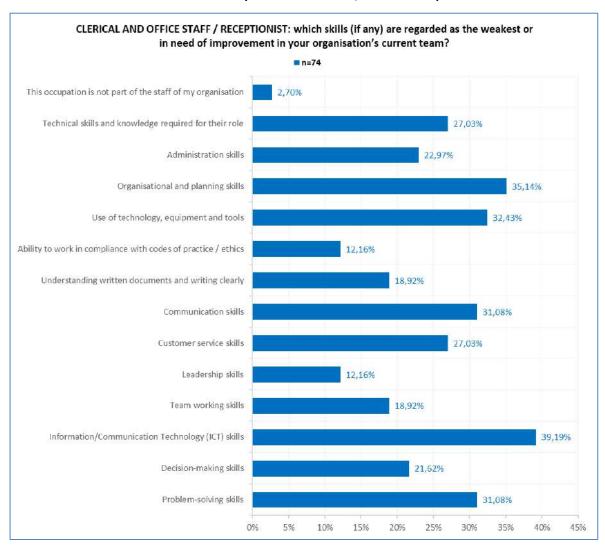
#### Clerical and Office Staff: Skills and Attributes by Level of Importance







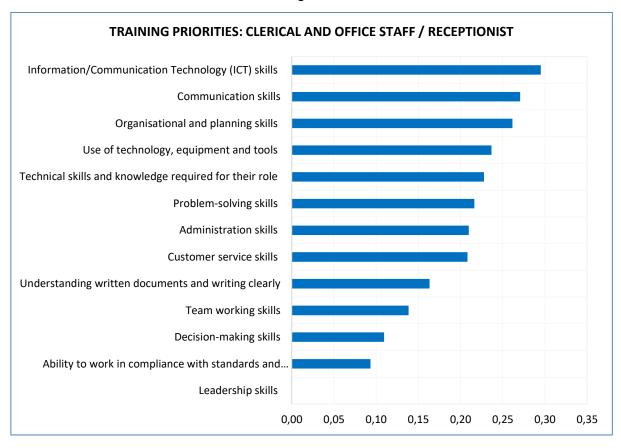
#### Clerical and Office Staff: Skills and Attributes by Level of Weakness/In Need of Improvement







## Clerical and Office Staff: Skills and Attributes as Training Priorities





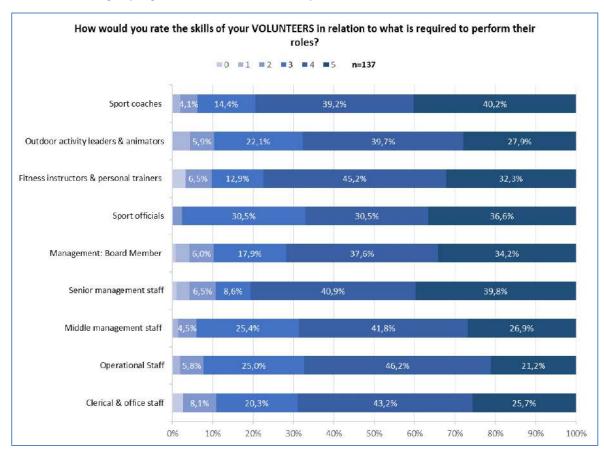


### 10) Expectations and Skills of Volunteers and Paid Staff

Generally, the number of Polish respondents who said they expected the same of volunteers and paid staff for each job role was roughly the same those who said they did not. The exceptions were: Sports Officials (71% said they expected the same); Middle Management (60% said they expected the same).

This is marginally higher than the expectations of the respondents in the full EU survey.

In almost all occupations, more than two thirds of respondents rated the skills of their volunteers at 4 or 5 (out of 5). This is slightly higher than the full EU survey.





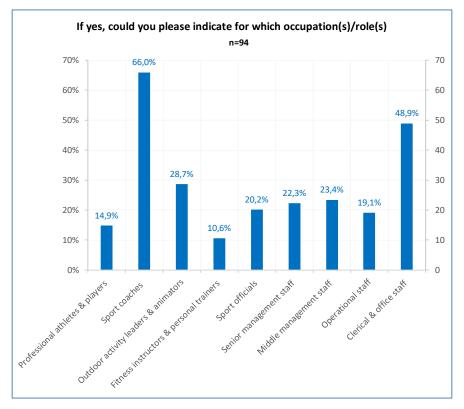


#### e) Recruitment and Retention

## 1) Recruitment

The top five Polish occupations being recruited are:

- Sports Coaches (66%),
- ★ Clerical and Office Staff (48.9%)
- Outdoor Activity Leaders and Animators (28.7%)
- ★ Middle Managers (23.4%),
- ★ Senior Management Staff (22.3%)

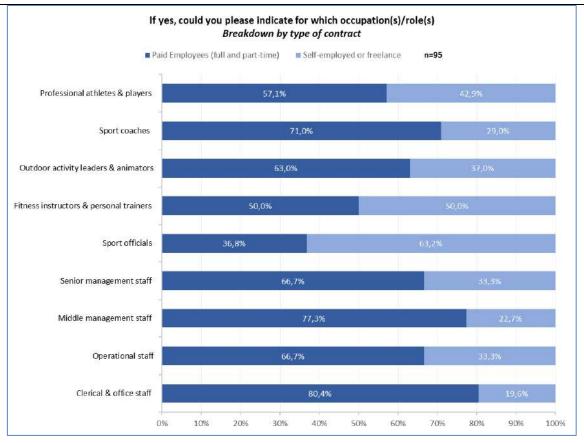


The first three occupations are the same as the full EU survey, with some minor differences in percentages. Across the EU 28, Operational Staff and Fitness Instructors appear more in demand than Outdoor Leaders/Animators and Senior Managers.

The majority of the Polish posts being hired for were paid employees with the exception of Fitness Instructors/Personal Trainers (50% freelance, 50% paid) and Sports Officials (36.8% paid and 63.2% self-employed)



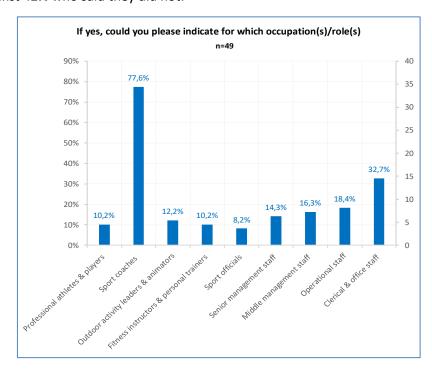




In the case of the full European survey, only Sports Officials had more freelance staff than paid employees (66% freelance, 34% paid).

#### 2) Recruitment Difficulties

29.6% of Polish respondents reported problems hiring staff (as against 26.7% who said they had no problems hiring staff and 43.8% who did not know). In full EU survey 27% said they had recruitment problems as against 42% who said they did not.







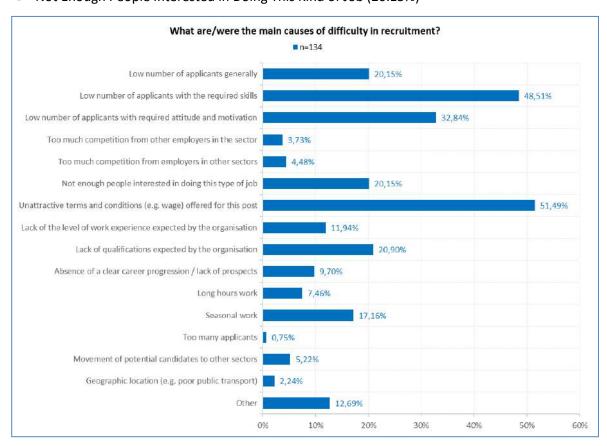
The top five Polish difficult-to-fill vacancies have some similarities with the occupations being recruited for. Thus, there were difficulties for:

- ★ Sports Coaches (77.6%)
- Clerical and Office (32.7%)
- ★ Operational Staff (18.4%)
- Middle Managers (16.3%)
- Senior Managers (14.3%)

It would appear, however, that Operational Staff are more difficult to recruit than Outdoor Leaders/Animators who are clearly in demand (Section 4.1 above).

The top five reported Polish recruitment difficulties were:

- Unattractive Terms and Conditions (including wages) Offered for the Post (51.5%),
- Low Number of Applicants with Required Skills (48.5%),
- Low Number of Applicants with the Required Attitude and Motivation (32.84%),
- Lack of Qualifications Expected by the Organisation (20.9%)
- ♦ Not Enough People Interested in Doing This Kind of Job (20.15%)



Again, there are strong similarities with the full European survey.

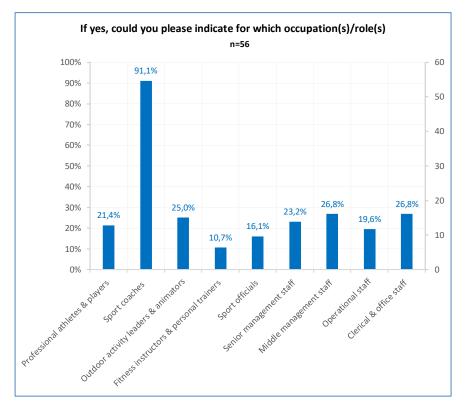




#### 3) Retention

When it comes to retention, the Polish pattern is similar for occupations being recruited for and difficult-to-fill vacancies. The occupations with the highest retention difficulties were:

- ★ Sports Coaches (91.1%)
- Clerical and Office (26.8%),
- ★ Middle Managers (26.8%),
- Outdoor Activity Leaders/Animators (25%)
- Senior Managers (23.2%)



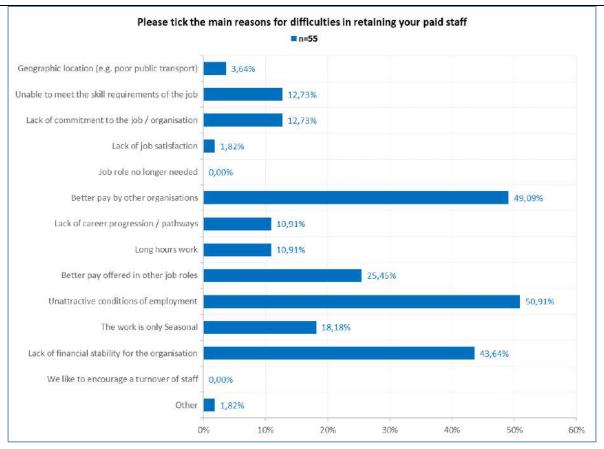
Similarities with the full European survey are again notable.

The main reasons for retention difficulties identified by Polish respondents were:

- Unattractive conditions of employment (51%),
- Better pay by other organizations (49%)
- ★ Lack of financial stability for the organisation (44%)
- Better pay offered in other job roles (25%)
- The work is only seasonal (18%)







There are some obvious differences here with the rest of Europe where Lack of Career Progression and Lack of Commitment to Job/Organisation featured in the top five and Unattractive Conditions of Employment did not feature at all.

#### 4) Engaging Volunteers

Only 9.7% of Polish respondents reported problems engaging volunteers. This compares with 38% in the full European survey.

The four most difficult to fill volunteer vacancies, according to Polish respondents, were:

- Sports Coaches (65%)
- Outdoor Activity Leaders/Animators (47%)
- ★ Sports Officials (41%)
- Management Board Members (41%)

However, only 17 respondents answered this question.

Again, similarities with the rest of Europe are very strong. The only difference is that Polish respondents placed Outdoor Activity Leaders/Animators in the top five whereas European respondents selected Clerical and Office Staff.





## f) Key Issues Working in Sport and Physical Activity

## 1) Method

27 statements were presented to Polish respondents who were asked to indicate their level of agreement. The next table shows the statements and the percentage of Polish respondents who said they either 'Agree' or 'Strongly Agree'. The statements are listed in order of their level of support.

## 2) Key Issues Ranking

Statement		% Agree or Strongly Agree	
1.	Effective governance is important to your organisation.	92%	
2.	The Sector is changing and evolving, as a result of the skills needed by those working in the Sector will change too.	91%	
3.	More effort is needed to make Sport and Physical Activity more inclusive in attracting participants.	90%	
4.	It is important that your staff have access to on-going training to keep their skills up-to-date.	89%	
5.	You find your staff are willing to train and develop themselves	87%	
6.	Improving governance should be a priority for all organisations.	87%	
7.	Universities/training providers should work more closely with organisations like yours.	80%	
8.	New training courses are required to meet the training needs of organisations like yours.	78%	
9.	The workforce of paid staff and volunteers in the sport and physical activity sector needs to be inclusive.	74%	
10.	In the future there will be a demand for a better qualified workforce operating in sport organisations like yours.	74%	
11.	Our staff would benefit from learning experiences in other countries.	71%	
12.	Sports organisations have become more professional in recent years.	71%	
13.	The skills required in our organisation are changing.	71%	
14.	Expectations and priorities from national government on sport organisations is increasing.	60%	
15.	Past experience is more important than qualifications when recruiting volunteers.	56%	
16.	There is a clear pathway for someone to gain employment in to organisations like yours and clear pathways for progression.	56%	
17.	Volunteers do NOT need the same level of qualifications to perform their roles as paid staff.	52%	





Statement		% Agree or Strongly Agree
18.	Expectations and priorities from national government are causing our organisation to change.	49%
19.	Our expectations of volunteers are as high as paid staff when they perform the same role.	49%
20.	It is difficult to find and recruit people with the right skills to work in your organisation as a volunteer.	48%
21.	Work experience is more important than qualifications when recruiting paid staff.	45%
22.	It is not easy to progress from a technical role (e.g. as coach or instructor) to a management position.	45%
23.	It is difficult to find relevant continuing professional development (CPD) courses for your staff.	41%
24.	Customer service is poor in sport and physical activity facilities and clubs.	33%
25.	Attitude and personality are more important than qualifications when recruiting paid staff.	32%
26.	It is difficult to recruit people from other EU countries because their qualifications are not easily understood or transferable.	31%
27.	It is easy to find and recruit people with the right skills to work in your organisation as paid staff.	25%

The top 12 statements selected by the Polish respondents are all to be found in the top 15 issues in the EU28 survey (although there are ranking differences), so there is a high level of congruence with the Europe as a whole.

## g) Workforce Development and Planning

## 1) Performance Review

- \$\displaysquare 27% of Polish respondents said that they regularly reviewed the skills and training needs of their staff team.
- ★ 33% reported that they did so 'partly'

This contrasts with the full European survey:

- \$\displaysquare 35% of respondents said that they regularly reviewed the skills and training needs of their staff team.
- 42% reported that they did so 'partly'

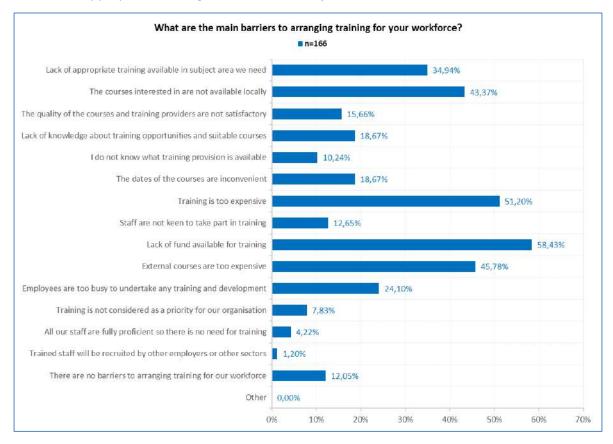




### 2) Barriers to Training and Development

The following barriers were identified by Polish respondents to arranging training for the workforce

- Lack of funds available for training (58%)
- ★ Training is too expensive (51%)
- External courses are too expensive (46%)
- The courses interested in are not available locally (43%)
- Lack of appropriate training available in the subject areas we need (35%)



This is broadly similar to the full EU survey where the emphasis was similarly on cost and lack of appropriate provision.

One strong message from these results could be that training provision needs to be made more flexible and relevant to the needs of Polish organisations.







## 8. REPORT ON NATIONAL CONSULTATIONS

To ensure the representativeness of the Council, invitations were sent to main sports communities across Poland with the aim to build an extensive network of connections between national organizations that work in the fields of education, research and expert analyses for the sector. Positive responses were received from over 30 persons. Representatives of Polish National Sports Associations, Statistics Poland, Physical Education Universities, private educational institutions providing sport-related education, as well as associations of sports instructors and coaches also took part in the works of the Council.

As part of the project, 4 working meetings of the Council were held.

On 23/05/2017 the Council for Sports Sector Competences was formally established.

At the Institute of Sport – National Research Institute in Warsaw the first meeting of the Council for Sports Sector Competences was held. It was attended by over 30 representatives of sports communities.

The Council's Board comprising seven members was appointed.

Members of the Board of the Council for Sports Sector Competences:

- 🕸 Żyśko Jolanta, Chairperson of the Council, Warsaw School of Tourism and Hospitality;
- ★ Marek Piotr, Project Coordinator, Institute of Sport National Research Institute;
- Cierpiał-Wolan Marek, Statistics Poland, Sports and Tourism Statistics Division;
- Pawlak Gabriel, Polish Association of Personal Trainers;
- ♦ Ratajczak Joanna, University of Szczecin;
- Siniarski-Czaplicki Michał, University of Łódź;
- 🕸 Tauber Maciej, Institute for Educational Research.

#### Members of the Council for Sports Sector Competences:

- Brachfogel Marcin, Ministry of Sport and Tourism;
- Butkiewicz Michał, Edukacja i Praca [Education and Work];
- Groffik Bartosz, Polskie Stowarzyszenie Trenerów Personalnych [Polish Association of Personal Trainers];
- Hertel Marek, Łódź Volleyball Association;
- Jaszczur-Nowicki Jarosław, University of Warmia and Mazury;
- Korpak Bartłomiej, Polish University Sports Association's Management Board;
- 🕸 Kowalski Ryszard, TKKF [Polish Sightseeing and Tourism Association], Branch in Toruń;
- 🕸 Krawczyński Marcin, National Council on Science and Higher Education, Ateneum College, Gdańsk;
- Lech Andrzej, Polish Association of Training Companies;
- Makaruk Hubert, Physical Education University branch in Biała Podlaska;
- Malinowska Ewa, Statistics Poland, Sports and Tourism Statistics Division;
- Perkowski Krzysztof, Physical Education University of Warsaw;
- Rutecka Alicja, Józef Rusiecki College, Olsztyn;
- 🕸 Skrzypczyk Rafał, Fundacja Aktywnej Rehabilitacji [Foundation for Active Physical Rehabilitation];
- Skubis Jacek, Polish Association of Judo Trainers, Polish Judo Association;
- Szeliga Łukasz, START Polish Association of Disabled Athletes;
- Szumilewicz Anna, Physical Education and Sport University of Gdańsk;
- Szymczak Agnieszka, Institute for Educational Research;
- Świderek Alojzy, Polish Volleyball Association;
- Włodarczyk Urszula, Institute of Sport National Research Institute;





- ★ Wojciechowski Tadeusz, Foundation for Education Systems Development;
- 🕸 Żukowski Ludwik, Association of Ski Instructors and Trainers

## Support is provided by:

#### Wosik Rafał, legal service;

- 🕸 Batorzyńska Paulina, PhD student, Physical Education University, Warsaw
- Mazur Zuzanna, PhD student, Physical Education University, Warsaw;
- 🕸 Kaleńczuk Łukasz, PhD student, Physical Education University, Warsaw

### 03/11/2017 – meeting of the Council for Sports Sector Competences

The main objective of the meeting was to discuss to-date works on the report - PART 2. The report structure and statistical survey methodology was discussed with the Council members. Marek Cierpial-Wolan, PhD, who represents Statistics Poland, discussed the most recent methods of collecting statistical data. In the closing part, conclusions were formulated:

- work will be undertaken on developing new tools and methods to better describe the sports sector;
- attempt will be made to estimate, by age groups and by required NACE codes, numbers of employees of entities whose work is related to the sports sector;
- attempt will be made to determine the size of fitness clubs/centres market, by way of the web scraping method;
- in the future, time should be devoted to Statistics Poland's presentation on research tools; experts from the sports sector should also be engaged in the discussion on the sector's needs in the field of statistical data and on gaps therein.

## The meeting was attended by the following Board members:

- 1. Żyśko Jolanta, Chairperson of the Council, Warsaw School of Tourism and Hospitality;
- 2. Marek Piotr, Project Coordinator, Institute of Sport National Research Institute;
- 3. Cierpiał-Wolan Marek, Statistics Poland, Sports and Tourism Statistics Division;
- 4. Pawlak Gabriel, Polish Association of Personal Trainers;
- 5. Siniarski-Czaplicki Michał, University of Łódź;
- 6. Tauber Maciej, Institute for Educational Research.

## Other participants:

- 1. Butkiewicz Michał, Edukacja i Praca [Education and Work];
- 2. Groffik Bartosz, Polskie Stowarzyszenie Trenerów Personalnych [Polish Association of Personal Trainers];
- 3. Malinowska Ewa, Statistics Poland, Sports and Tourism Statistics Division;
- 4. Batorzyńska Paulina, PhD student, Physical Education University, Warsaw;
- 5. Magdalena Słowikowska, Coaching Academy's staff member

## 17/09/2018

The main objective of the meeting was to discuss the ongoing works on the project and to analyse the sources of statistical data on the sports sector. The representative of Statistics Poland presented a report *Employees of the sports sector*, drawn up based on labour market surveys by public-sector organizations.





In connection with the ongoing works on descriptions of the sports sector qualification standards, a plan of a document containing sets of skills for Polish sports associations was presented. As a result, the standards should be included in the Integrated Qualifications System.

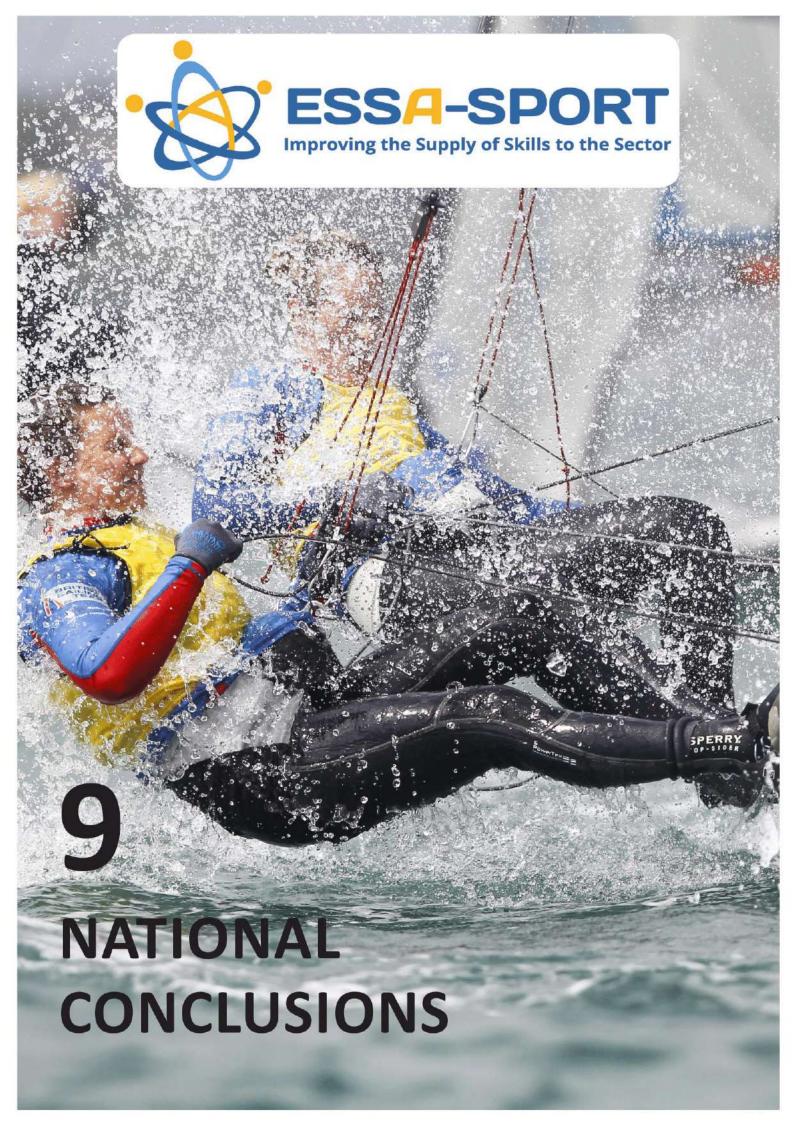
### 25/03/2019

The main objective of the meeting was to present to-date works on the report, to discuss its individual sections based on which conclusions and important suggestions were recommended to be included in the report. Recommendations and priority actions for the sports sector in Poland were discussed.

14/11/2018 - Salzburg (Austria)

The project was presented in a meeting of the European Expert Group "Skills and Human Resources Development in Sport", held as part of the in consultations with EU member states.

The meeting focused on the development of a model of coaches' education in the European Union countries. The participants discussed the strategy of development of the qualifications framework for the sports sector, as well as the main development directions of the sports coaches and instructors education system. The ESSA SPORT project and its main objectives were presented.







### 9. NATIONAL CONCLUSIONS

Within the ESSA-Sport project, the project implementation team has formulated the following conclusions:

- The results and reflections on the competences and qualifications of athletes and sports sector employees (administrators, teachers, instructors, coaches, etc.) should be formulated as recommendations for the ministers responsible for sport and for education. Activities in this field should also be targeted at public-sector institutions (rectors' councils, physical education universities, education programming institutions, etc.).
- It is recommended to jointly develop a methodology for data collection and analysis (data generation). Of key significance in this area is to determine the types of collected and analysed data.
- It is recommended to develop a common tool for online data collection and analysis
- The report's conclusions should focus on legislation (amendments and updates thereof). Further works should result in the development and publication of a catalogue of good practices in this area of activity.
- Development of measurements for the sports sector classification (a central database), e.g. in the form of coach/instructor activity's classification number.
- Sectoral indications and solutions should be developed so as to enable transfer within the system from the sports sector to the professional sector (employment of athletes).
- ★ A central database of coaches and instructors should be developed.
- The so-called grey market of persons conducting non-registered sports activity or sports-related activity should be minimized.
- As an element of the strategy, a national-level project in the field of athletes' dual career should be implemented.







## 10. NATIONAL ACTION PLAN AND RECOMMENDATIONS

Thematic 1:									
Recommendation	Priority Action	Actors	Timeline	Measure of success	Comment				
	Formulation of sports policy strategic objectives and priorities	Ministry of Sport and Tourism	December 2020	Strategy document					
Development of evidence- based policy on the sports sector monitoring	Data collection methodology development	Ministry of Sport and Tourism Statistics Poland ZUS Social Insurance Institution	December 2020	Methodology description document					
	Monitoring tools development	Ministry of Sport and Tourism Statistics Poland	March 2021	Monitoring tools description document					
	Sports Sector Monitoring System (SSMS) development	Ministry of Sport and Tourism	June 2021	SSMS description document					
	Amendment of the legislation	Ministry of Sport and Tourism	June 2021	Legislative act					
Implementation of evidence-based policy on the sports sector monitoring	SSMS implementation	Ministry of Sport and Tourism Statistics Poland	December 2021						
	Managerial decision- making	Ministry of Sport and Tourism	on continuous basis						
	Problem diagnosis	Ministry of Sport and Tourism	December 2019	Report					
Reduction of the "grey market" in the sports sector	Development of solutions	Ministry of Sport and Tourism	June 2020	Report					
SECLUI	Implementation	Ministry of Sport and Tourism	December 2020	Reduction of the "grey market" in line with the report's recommendations					





#### Thematic 1: Measure of Recommendation Actors Timeline **Priority Action** Comment success Integrated Qualifications System for qualifications Setting out objectives Ministry of Sport Agreement with 2019/2020 quality and priorities and Tourism the agency assurance in Establishment of the the sports qualifications quality sector is assurance agency developed At least 15 Ministry of Sport Training for experts 2020 and Tourism experts trained At least 15

agency

qualifications



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## **BIBLIOGRAPHY**

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