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**REGIONE AUTÒNOMA DE SARDIGNA**  
**REGIONE AUTONOMA DELLA SARDEGNA**



**Skills4Sports**

**Increasing the Employability of NEETs by tackling the skills gap for  
the Sports Sector**

## **A.3.2.1**

### **Situation Analysis and Report**

WP3 – Research & Tools Development



The project is funded by the EU under the  
ENI CBC Med Programme

## Document Information

<b>Grant Contract Number</b>	B_A.3.1_0260	<b>Acronym</b>	Skills4Sports
<b>Full Project Title</b>	Increasing the Employability of NEETs by tackling the skills gap for the Sports Sector		
<b>Start Date</b>	29 <sup>th</sup> July 2020	<b>Duration</b>	30 months
<b>Activity</b>	A.3.2.1. Situation Analysis and Report		
<b>Work Package</b>	WP3 Research & Tools Development		
<b>Date of Delivery</b>	May 2021		
<b>Responsible Partner(s)</b>	INDESCAT		
<b>Responsible Author(s)</b>	INDESCAT		
<b>Description</b>	Increasing the Employability of NEETs by tackling the skills gap for the Sports Sector IN Catalonia		

## Review History

Version	Date	Reviewed by	Justification

## Disclaimer

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# The 2014-2020 ENI CBC Mediterranean Sea Basin Programme

The 2014-2020 ENI CBC Mediterranean Sea Basin Programme is a multilateral Cross-Border Cooperation (CBC) initiative funded by the European Neighbourhood Instrument (ENI). The Programme objective is to foster fair, equitable and sustainable economic, social and territorial development, which may advance cross-border integration and valorise participating countries' territories and values. The following 13 countries participate in the Programme: Cyprus, Egypt, France, Greece, Israel, Italy, Jordan, Lebanon, Malta, Palestine, Portugal, Spain, and Tunisia. The Managing Authority (MA) is the Autonomous Region of Sardinia (Italy). Official Programme languages are Arabic, English and French. For more information, please visit: [www.enicbcmed.eu](http://www.enicbcmed.eu)

## The European Union

The European Union is made up of 27 Member States who have decided to gradually link together their know-how, resources and destinies. Together, during a period of enlargement of 50 years, they have built a zone of stability, democracy and sustainable development whilst maintaining cultural diversity, tolerance and individual freedoms. The European Union is committed to sharing its achievements and its values with countries and peoples beyond its borders.



## Table of Contents

<b>1</b>	<b><i>Introduction and Methodology</i></b>	<b>7</b>
<b>2</b>	<b><i>Portrait of the location</i></b>	<b>8</b>
<b>3</b>	<b><i>Analysis</i></b>	<b>11</b>
<b>4</b>	<b><i>Supported mechanisms related to the skills development for the sport sector</i></b>	<b>23</b>
4.1	Legal Framework	23
4.2	National and regional strategies and strategic objectives for the improvement of the sports sector	27
4.3	National, regional and EU funds available for the sports sector	31
4.4	Mapping of current activities and initiatives	32
4.5	Mapping of current activities and initiatives	34
4.6	Barriers and drivers	35
4.7	Supporting mechanisms related to skills development	37
<b>5</b>	<b><i>Regional Conclusions</i></b>	<b>39</b>
<b>6</b>	<b><i>Bibliography</i></b>	<b>41</b>
<b>7</b>	<b><i>Annexes</i></b>	<b>42</b>
1.	Annex 1. Questionnaire for the online survey	42
2.	Annex 2. SWOT Analysis	43
3.	Annex 3. PESTLE Analysis	45



*Catalonia*

# SITUATION ANALYSIS REPORT

within the project Skills4sports

*Barcelona*  
31-05-2021

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## 1 Introduction and Methodology

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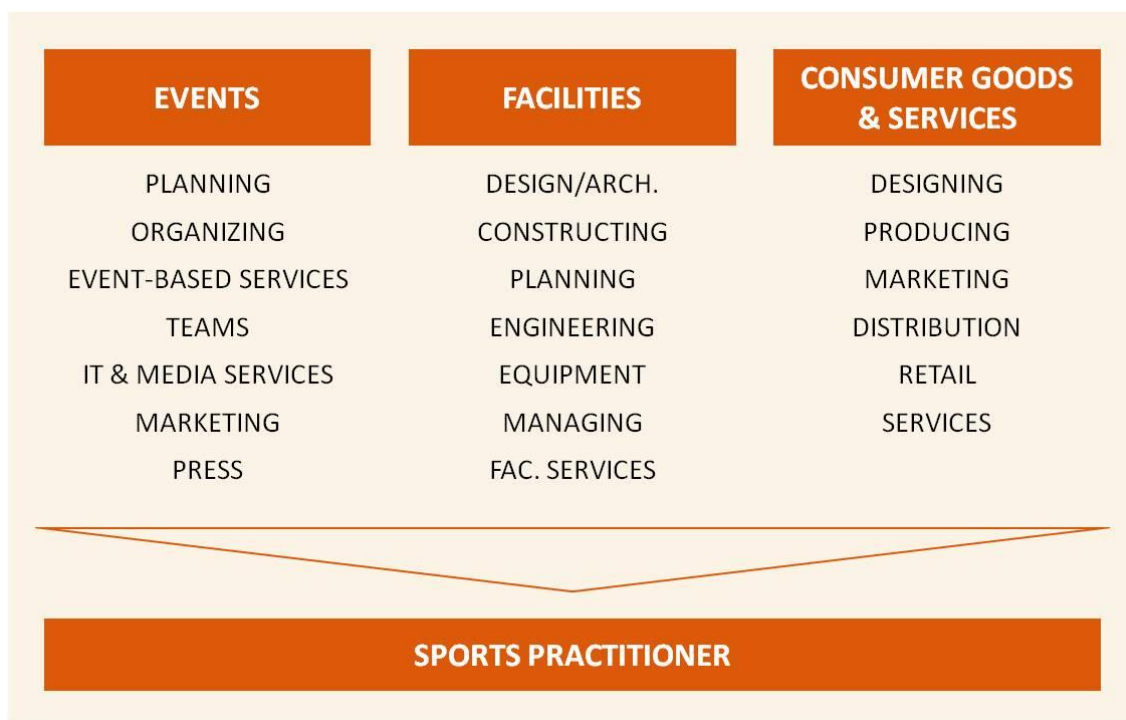
In order to have an overview of the region of Catalonia on the training and labor skills within the sport sector, we have undertaken **desk research**, by collecting data from existing resources, such as papers published by universities, statistics from national and regional agencies.

Apart from this overall overview and in order to obtain direct results from our members, we have conducted **19 interviews** via telephone or through virtual meetings during 2021. The script of the interviews was divided into three different sections:

- **Analysis on the information of the companies**
- **Impact of the COVID-19 on their business** (which we felt was really relevant due to the many doubts and questions arisen from the new situation after the pandemic crisis)
- **Their future challenges, opportunities and sports skills needs**

As INDESCAT, we have selected **different typologies of companies, with unequal sizes and turnover**, which in fact are a representation of the whole Catalan sports industry. In this sense, we have interviewed 4 micro companies, which represent 30% of the total members of INDESCAT; 7 small companies, which accounts for 50%; and 3 medium companies and one large company, which represent less than 5% of our members. We have also conducted interviews to non-private organisations, as they are also INDESCAT members, such as a university, a research center, a city council and a tourism board association.

We have also taken into consideration the **segment** that they represent within the sports industry. In this sense, we have tried to select the same number of companies for each segment or value chain in the sports sector: **events, facilities and products and services**.



Regarding the number of employees, 50% of the companies interviewed have from 10 to 49 employees, 26% have from 1 to 9 employees and 24% more than 1,000 employees. The high number of employees is explained by the need of companies linked to sports facilities and events, which require a large workforce in order to run their business.

## 2 Portrait of the location

Catalonia is an autonomous community located in the north-east of Spain, between the Pyrenees and the shores of the Mediterranean Sea. It exercises its self-government in the Spanish State. It covers a total area of 31,108 square kms and comprises four provinces (Barcelona, Lleida, Tarragona and Girona) and 947 municipalities.

Catalonia has a population of **7,672,699 inhabitants** and a population density of 238.97 p/km<sup>2</sup>. The capital and largest city, Barcelona, is the second-most populated municipality in Spain and the fifth-most populous urban area in the European Union.





The Generalitat is the institutional system around which Catalonia's self-government is politically organised and it dates from 1359. It consists of the Parliament, the Presidency, the Government (formed by the Executive Council) and other self-governing institutions, such as the Síndic de Greuges (guarantor of the rights and liberties of citizens) and the Sindicatura de Comptes (control of the economic accounts of Catalan public institutions).

The Generalitat has extensive competencies in matters such as education, health, citizen security and civil protection, culture, linguistic policy, industry, urban development, housing, regional politics, transport and the environment, among others. Catalonia has its own police force, the Mossos d'Esquadra, which has been covering the full territory since November 1st, 2008.

## Catalonia in figures

- **Area:** 32,108 km<sup>2</sup>
- **Population:** 7.5 million (2016)
- **GDP:** €223.6 billion (2016)
- **GDP per capita:** €29,966/year (2016)
- **Exports:** €65.1 billion (2016)
- **Imports:** €77.8 billion (2016)
- **Tourists/year:** 18 million (2016)

## Business data

- **Companies:** 596,196 (2016)
- **Industrial companies:** 35,698 (2016)
- **Innovative companies:** 9,449 (2015)
- **Regular exporting companies:** 16,929 (2016)
- **Foreign companies:** 7,086 (2016)
- **Foreign investment:** €4,857 million (2016)
- **Catalan companies abroad:** 9,256 (2016)

**16%**

OF SPANISH  
POPULATION

**20%**

OF SPANISH  
GDP

**24%**

OF SPANISH  
INDUSTRY

**25%**

OF SPANISH  
EXPORTS

**26%**

OF SPANISH  
BUSINESS  
EXPENDITURE

**34%**

OF REGULAR  
EXPORTING  
COMPANIES

Source: Catalonia trade & Investment ([www.catalonia.com](http://www.catalonia.com)). Government of Catalonia

**INDESCAT** is the Catalan Sports Industry Cluster, a private entity led by companies. As a cluster, we bring together companies and organizations related to the world of sport, with the main objective of developing actions that improve their competitiveness and also that of their environment. INDESCAT represents more than 90 companies and organizations, with an overall turnover near 2,000 M€, which offer services and products to the sports and physical activity market.

INDESCAT is a non-profit association including companies and organizations from all the sports segments, from micro-enterprises to large companies with global presence. We consider that the sports industry is grouped into 3 major segments, being all of them represented in INDESCAT.

**INDESCAT means: INDUSTRY + SPORT + CATALONIA.**

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## 3 Analysis

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### 3.1 National key facts and overall Data on the Labour market

#### 3.1.1 General Overview

According to the data from the municipal register on 1 January 2019, Catalonia's population totalled 7,672,699, with 3,768,981 men and 3,903,718 women, marking a 0.96 % increase over the previous year's figures. The population density is 238.97 inhabitants per km<sup>2</sup>. The non-national population residing in Catalonia accounts for 15.09 % of the total, 6.97 % higher than in the previous year. Catalonia accounts for 16.32 % of the total Spanish population.

The largest number of inhabitants live in Barcelona (73.81 %), followed by Tarragona (10.48 %), Girona (10.04 %) and Lleida (5.56 %). Source: <https://ec.europa.eu/eures>.

The 11 municipalities with over 100 000 inhabitants ranked from highest to lowest population, are: Barcelona, L'Hospitalet de Llobregat, Terrassa, Badalona, Sabadell, Lleida, Tarragona, Mataró, Santa Coloma de Gramenet, Reus, and Girona.

The bulk of the employed population works in the services sector (75.00 %), followed by industry (17.90 %), construction (5.52 %) and agriculture (1.58 %).

With more than 7.5 million inhabitants, the Autonomous Region of Catalonia is the second most populous region in Spain, representing 16% of its total population. Catalonia is the main contributor to the Spanish economy, with nearly 19% of Spain's GDP. The GDP per capita is higher than the European Union average (EU-27). Source: OECD Review of higher education in Regional and City Development.)

#### 3.1.2. Impact of COVID

##### - The COVID19 impact in the Catalan Economy:

The above-mentioned figures were the tendency before the COVID-19 pandemic. The outbreak of the pandemic had an enormous impact on the worldwide economy and Catalonia is not an exception. The high dependence on tourism and to the service industry has had a deep effect, as there are sectors highly impacted by the economic downturns, such as tourism, the sports industry, construction, etc. One would have to go back to the Civil War to find such a significant decline. Catalonia's gross domestic

product (GDP) fell by 11.4% in 2020 (Source: IDESCAT). The impact of the pandemic on the Catalan economy was greater than that of the Spanish and European economies. The Community GDP fell five points less than the Catalan economy (-6.4% EU-27), while the advance of the Spanish GDP given by the INE (-11%) is four tenths of a percentage point less than the decline of the Catalan GDP.

Catalan GDP could grow by 6% in 2021, recovering only half of what was lost in 2020. In 2022 the upward trend will continue at a similar rate than 2021 (6.1%) and the recovery of the economy will be by the end of the year approaching the pre-pandemic level of 2019. Therefore, it will be a recovery spread over two years. As for the labor market, the forecasts states to a growth of the number of employees (3.8%, compared to one 9% drop in 2020), which will not prevent an unemployment rate growth (12.6% in 13.5%), given the atypical evolution of these magnitudes, affected by ERTOs (temporary mechanism for adjusting companies "labor costs" for those people that could not work, implanted from march 2020 until 2021). In March 2021 the number of unemployed in Catalonia is 27.8% higher than in March 2019, before the pandemic according to the Cambra de Comerç de Barcelona, the trade chamber of Barcelona. In the under-25 group, unemployment has risen by more than 43% in the last year and leaves without employment a final balance of 41,879 young people, 12,602 more than a year ago.

The reasons for this situation are diverse: some short-term contracts and the fact that 80% of young people are entering to the labor market through the services sector, one of the most punished by the restrictions and health measures generated by the pandemic. But there are also structural ones, as young people, in general, are much easier to terminate their job contract because of their temporarily.

#### -The COVID-19 impact on the sport sector

The whole sports ecosystem has been highly impacted by the Coronavirus pandemic and lockdown, from governing bodies to competition organisers, clubs, owners/investors, athletes, broadcasters, sponsors and suppliers.

The sports companies were the first to close their business and still there are some companies (sport events, gyms...) that have not been able to resume 100% their business yet.

Almost 8 out of 10 companies surveyed did take advantage of the ERTO (suspension of the employee contract for a period of time), by which the workers get 70% of their

salary from the government, condition that was created by the Spanish government due to the COVID-19 crisis. This has affected almost 7 out of 10 workers within the sector.

45% of the respondents anticipated that they would have to apply regulations over their staff force when the activity resumes. This would mean that 3 out of 10 workers in the sports sector would lose their job.

The impact on the sports workforce was and is therefore high, due to the impossibility to do remote work, as per the nature of the industry comprising segments such as events and sports facilities or gyms. 80% of companies surveyed stated that they will have to change and adapt themselves in order to reduce the impact of the crisis. The overall current economic situation of the private sports sector is negative, as 85% of the companies consider their present economic situation as bad or very bad.

Many uncertainties have arisen from the COVID situation, such as how to simultaneously manage fan expectations, mass events, gyms and other sports facilities. How to minimize operational disruption or plan future production of sports goods and services both in the short and long term are biggest future challenges due to the coexistence of the virus.

As regards possible changes to reduce the impact of the new situation, 20% of the companies declare that they will remain the same, whereas the other 80% of the respondents will push their organisations to transition to new operating models that they may have been already considering. While some of them will be forced to adapt themselves, many will see this situation as an opportunity to transform themselves. This transformation includes being involved in new technologies, innovation processes and new operating channels, which might be the solution as it is expected that the pandemic stays with us at least in the coming months.

To face the post-crisis economy, Catalonia and its universities and other tertiary education institutions in regional development need to address the following challenges:

- How to create jobs, address unemployment and improve the flexibility of the population to face rapid changes in the labour market and how to improve the relevance and quality of education. Diversify from the service sector to other skills sector, such as technological, medical, energy efficiency industries and capable of adding value to the country exports.

- How to transform the economy through upgrading established industries and building new market opportunities and how to strengthen and diversify the existing industries and improve the absorptive capacity of the SME-based economy.
- How to address the socio-economic gaps and the needs of the diverse population with a large number of young long-term unemployment.
- How to reform the governance and management to unleash the potential of universities for local regional development and greater efficiency and productivity.

### *3.2 Sport labor market statistics*

For this section, we will provide general data, as unfortunately for sports economics and labor market, we do not have specific existing statistics or an economic code from which we can directly take the information.

In 2019, employment in sport represented 0.69 % of total EU-27 employment, ranging from 0.2 % in Romania to 1.6 % in Sweden. For the majority of EU Member States, sport employment shares did not surpass the 1 % threshold; in addition to Sweden, only Finland, Latvia, Spain and Denmark exceeded 1 %. By gender, in 2019, men accounted for 54 % of sport employment in the EU-27 and by age, and more than one third of employees in sport in the EU (35 %) were aged between 15–29 years old.

Considering the educational background of people employed in sport in the EU-27 in 2019, 39% had completed tertiary education. In five EU Member States - namely Cyprus (73 %), Greece (58 %), Lithuania (55 %), Spain (54 %) and France (51 %) - at least half of those working in sport were tertiary graduates. (<https://ec.europa.eu/>).

Apart from this EU general information, INDESCAT has recently elaborated a study to quantify the Catalan sports industry, based on the following criteria:

- Source: Own elaboration from SABI (Information extracted in March 2021 with data from companies that had annual accounts delivered between in 2014 and 2019, taking the latest available) and information provided by the cluster members themselves or found in other close sources.
- For those companies where not all their turnover is related to sport, only the segment linked to sport has been considered.
- Despite not being considered industry due to its legal form, FC Barcelona has remained in the accounts, as its counterpart RCD Espanyol de Barcelona and other

SADs (Sociedades Anónimas Deportivas), such as the Formula 1 Circuit de Barcelona-Catalunya.

- Complementing the previous point, no non-profit entities or public administration have been considered.

In Catalonia, sports account for 2% of the total GDP and employs 31.768.00 people, being the facility sector (gyms, clubs, Facility management), the sport segment with more employment, with 44.34%, followed by the production and sale of sports goods. With regards to INDESCAT members, the relation of turnover and workforce are as follows:

	nº companies	% companies	Turnover (millions euros)	% turnover.	Nº workers	% nº workers.
Sports consulting and training	19	19,39%	51.773 €	2,21%	677	14,19%
Event organisation	13	13,27%	16.873 €	0,72%	211	4,42%
Media	0	0,00%	- €	0,00%	-	0,00%
Event based services	5	5,10%	4.494 €	0,19%	92	1,93%
Competition teams	3	3,06%	25.187 €	1,08%	339	7,11%
Events	40	40,82%	98.327 €	4,20%	1.319	27,65%
Facility construction	7	7,14%	400.567 €	17,11%	1139	23,87%
facility Equipment	6	6,12%	59.825 €	2,55%	148	3,10%
Facility management	15	15,31%	64.965 €	2,77%	1.482	31,06%
Facilities	28	28,57%	525.357 €	22,43%	2.769	58,04%
Health and Nutrition	1	1,02%	23.250 €	0,99%	115	2,41%
Tools and instruments	15	15,31%	9.319 €	0,40%	114	2,39%
Clothes and accessories	2	2,04%	32.522 €	1,39%	182	3,81%
Health, wellness and performance	10	10,20%	1.644.385 €	70,22%	238	4,99%
Active sports tourism	2	2,04%	8.537 €	0,36%	34	0,71%
Sports goods and services	30	30,61%	1.718.013 €	73,37%	683	14,32%
<b>TOTAL</b>	<b>98</b>	<b>100%</b>	<b>2.341.696 €</b>	<b>100%</b>	<b>4.771</b>	<b>100%</b>

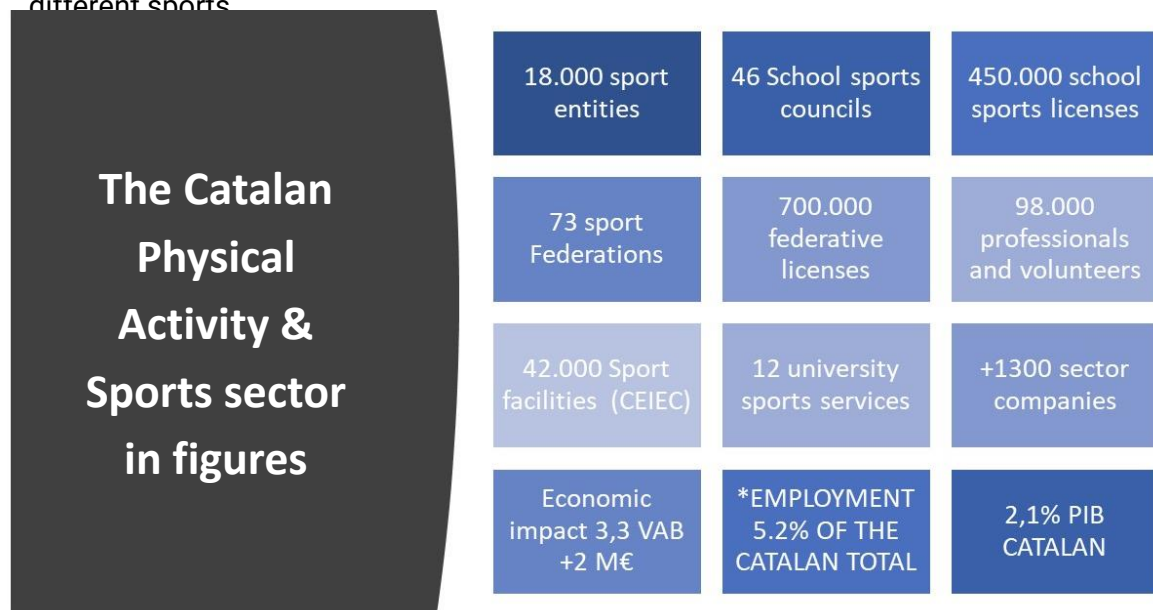
Source: Indescat

### 3.3 The Regional Sport Sector

In Catalonia, according to the Catalan Sports Council, there are around **18.000 sports clubs** affiliated to one or more sports federations. Catalonia has **73 sports federations** and most Catalan sports clubs are affiliated to one of them, having in total **700.000**



**sports practitioners.** Catalonia has 10 high performance centers specialised in different sports



**Catalonia is the area with the greatest concentration of sports companies in Europe.** There are more than **1.300 companies related to sport**, representing more than **6.500 million euros** and with more than **30.000 employees**, representing **2% of total employment in Catalonia.**

\*Includes also the city hall and federation workers. (Source: COPLEFC)

The strategy of the sports sector in Catalonia is made by The General Secretariat of Sport and Physical Activity which is the body of direction, planning and execution of the Sports Administration of la Generalitat (Government of Catalonia) and it is responsible for:

- To promote and monitor interdepartmental projects and programs in the territory related to the sector of physical activity and sports.
- To carry out the economic, financial, and budgetary monitoring of the entities attached to the Department of the Presidency through the General Secretariat of S.

The **strategic plans elaborated by the General Secretariat of Sport** are:

- Master Plan for Sports Facilities and Equipment of Catalonia (PIEC)



- Strategic Plan for the Sport in Schools in Catalonia (PEEC)
- Strategic Plan of the University Sport of Catalonia (PEEUC)
- National Plan for the Promotion of Physical Activity (PNPAF)
- Strategic Winter Sports Plan of Catalonia

The General Secretariat of Sport and Physical Activity supports the Catalan clusters of the sports industry, INDESCAT and MOTORSPORT. These two entities share the mission with the General Secretariat of Sport and Physical Activity and bring together companies and entities linked to the world of sports with the aim of developing actions to improve their competitiveness.

INDESCAT main strategic areas are:



The most relevant **segments of the Catalan sports industry** are as follows:

- Sports Events: planning, organising, Event-based services, teams, IT & Media services, marketing and press
- Sports Facilities: Design / architecture, constructing, planning, engineering, Equipment, Managing and Facility services.

- Sports Consumer goods and services. Designing, producing, marketing, retail, textiles, health, nutrition and sport tourism.

The **main sports and physical activities** in Catalonia region by federated people in 2019 were: football, basketball, swimming, hiking activities, cycling and Athletics. If we consider not federated people, the most relevant disciplines are: Walking, Home gymnastics, Swimming, Sport activities in Gyms and amateur running. (<https://www.idescat.cat/>).

As regards sports practice, a study elaborated by INDESCAT in 2018 confirms that **52% of the population consider themselves active athletes**. (Estudi del practicant 2018).

**Barcelona is the 7th world capital of the sport**, and the 1st at the national level. The number of sport facilities registered throughout Catalonia are 42.000 sports facilities, 18.000 sports clubs and 21 recognised national teams.

The most **important venues** are: The New Camp (Football Club Barcelona, Circuit de Barcelona-Catalunya (motor), Real club de Polo, Real Club Deportivo Español de Barcelona (football), Real Club de Tennis Barcelona, Club Natació Sabadell (swimming) and Palau Sant Jordi (multisport). And the most relevant **international events** yearly held are: F1 Barcelona – Catalunya, World Rally Championship, Moto GP, Barcelona Open Sabadell Conde Godo (Tennis), La Volta Catalunya (cycling), Ironman Calella-Barcelona, Marathon BCN and the Sea Otter Europe (cycling).

Sports activities are a significant tourist motor and have become a driver to visit a destination. For this reason and since 2003, the Catalan Tourism, the agency of the Government of the Generalitat with the function of promoting tourism in Catalonia, grants municipalities that meet certain conditions to be certified **Sports Tourism Destination** (DTE). Today, Catalonia has 16 sports tourism destinations, which are extended by the four Catalan provinces.

### *3.4 Regional education and training system*

One of the main characteristics of the administration of the education system in Spain is the decentralisation: educational competences are shared between the General State Administration (Ministry of Education and Vocational Training) and the authorities of the autonomous communities (Departments for Education):

- The central education administration executes the general guidelines of the Government on education policy and regulates the basic elements or aspects of the system.
- Regional education authorities develop the State regulations and have executive and administrative competences for managing the education system in their own territory.

The Departament d'Ensenyament (Regional Ministry of Education) is the administrative body of the Government of Catalonia in education matters and is responsible for: the proposal and implementation of general non-university educational policy, training and recruiting trainers, and the management of training centers. The Regional Ministry of Education of the Government of Catalonia sets up training programmed for IVET students and supports training centers in close co-operation with local companies and professional associations.

In Spain Basic education is compulsory and free in publicly funded schools. It lasts ten years and it is divided into two stages:

- Primary education, provided in primary schools. It covers six academic years, usually studied between the ages of 6 and 12.
- Compulsory secondary education, studied in secondary schools, between the ages of 12 and 16. At the end of this stage, students receive the first official certificate, the Lower Compulsory Secondary Education Certificate, which allows them to have access to upper secondary education or the world of work.

The main areas of activity in high education are divided into four main fields: formal education, which covers compulsory and higher education; occupational training, which includes professional training and lifelong learning; non-formal education, which

includes various specific types of education that complement formal education and occupational training; and online training, a new tool for delivering training based on new information and communication technologies.

One of the commitments that the Spanish Government has made regarding this sector is to improve the quality of education in order to bring it up to European Union levels of quality. Therefore, reducing the early school abandonment, improving the PISA results, implementing short-and long-term strategies are key challenges, which will have to be based on alliances between businesses and universities and the gradual incorporation of dual training to increase employability. It will also hinge on the introduction of new teaching techniques combining traditional approaches and new technologies.

In Catalonia, a significant proportion of the young age group remains outside education and training. In Spain, nearly one in three people between the ages of 18 and 24 have not completed secondary education and are not enrolled in education or training, representing more than double the EU average (EU-27). Source: OECD.

Spanish tertiary education system has experienced significant growth and transformation over the last 20-25 years. In Catalonia, the average number of years in formal education for the working population has doubled, and the population with tertiary education qualifications has grown almost seven-fold. Currently, about one-third of the total working population has received some form of tertiary education. Source: OECD.

### *3.5 Regional sport education and training system*

The sport education and training in Catalonia is divided as follows:

#### **1- Vocational training**

Vocational-training studies enable you to obtain qualifications to work in various professions, as they provide the training required for acquiring each sector's vocational skills. These studies are divided up into professional families and can be

studied at intermediate-level cycles (which enable students to obtain a technical qualification) and higher-level cycles (through which higher technical qualifications can be obtained):

- **Sports instructors**

- Qualification for sport instructor and superior sport instructor. Such courses provide students with the qualifications needed to act as instructors in the sport of their choice:

- Intermediate, which is made of two training levels (first and second)

- Advanced, which is the third training level, which leads to the qualification of Advanced Sports Coach in a sports speciality.

- **Instructors of physical/sport activities in the natural environment (outdoor)**

Middle grade training as instructor of sport and physical activities in the natural environment. The aim of such training is to lead clients safely along paths or in mountainous areas (where there is no need to apply mountaineering techniques) either on foot, bicycle or on horseback.

- **Technician in teaching and sports animation**

Higher-grade training as animateurs in the field of physical activities and sports. The aim of such training is to learn to teach and encourage people to become involved in games, physical and sport activities, and recreational activities either on an individual basis or as part of a team using equipment, or in basic physical fitness activities.

- **Technician in fitness**

Training cycle of higher degree of higher technician in physical conditioning.

## **2- University Studies**

- **Teaching diploma in the field of physical education**

Studying to be teachers specialising in physical education. The aim of this training is to provide students with the knowledge necessary for the didactic and scientific preparation of future educators in this specific field.

- **Undergraduates in Physical Activity and Sport Sciences**

Studying Physical Activity and Sport Sciences. The aim of these studies is to provide adequate training in basic aspects applied to Physical Activity and Sport in all their manifestations.

- **Master's degrees**



Master's degree courses are exclusively for university graduates and are characterised by their duration, specialisation and academic excellence.

- **Postgraduate Doctoral Degree (PhD)**

A PhD is a postgraduate doctoral degree, awarded to students who complete an original thesis offering a significant new contribution to knowledge in their subject. The aim of PhD studies is the training of advanced research techniques.

The universities where you can study the above courses are:

- **INEFC** - Institut Nacional d'Educació Física de Catalunya (National institute of physical education in Catalonia) is the most relevant one. It is an autonomous body dependent on the autonomous government of Catalonia that teaches physical education and sports. It has two centers: one in Lleida (associated with Universitat de Lleida) and one in Barcelona (associated with Universitat de Barcelona). Last month, INEFC director signed an agreement with the Generalitat of Catalonia to open a new center called INEFC Pirineus the north of Catalonia (La Seu d'Urgell). This center is going to be highly focused on outdoor sports.
- The following universities also teach the courses listed before:
  - Universitat de Vic
  - Universitat Ramon Llull- Blanquerna

More management-focused degrees are done in the following universities.

- Universitat de Girona
- Universitat de Barcelona-Universitat Ramon Llull - Blanquerna
- Universitat Rovira I Virgili
- Universitat Autònoma de Barcelona
- Universitat Pompeu Fabra
- EUNCET

### **3- Regulated training**

The Catalan School of Sport, under the Sports Catalan council, offers courses for sports animators monitors and coaches. All of these courses are official and will allow the students to register to the ROPEC (the official register of sports professionals) that is mandatory from 2008 for any teacher, trainer, coach and manager related to sports field.

#### 4- Private training academies.

Quality education and training for aspiring athletes, trainers, and coaches. Some of the most popular are:

- <https://www.kaptivasports.com/>
- <https://johancruyffinstitute.com/en/>
- <https://barcaacademy.fcbarcelona.es/es/>
- <https://www.btatennis.com/>
- <https://www.biwpa.com/academy/>
- <https://www.europebasketballacademy.com/>
- <https://www.sportperformancecentres.org/centres/bruquera-tennis-academy-barcelona>
- <https://sanchez-casal.com/>

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## 4 Supported mechanisms related to the skills development for the sport sector

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### 4.1 Legal Framework

#### - Spanish Level legal framework and strategy

The Spanish sports model is basically structured on Act 10/1990 on sport and developed by various other regulations that deal with the institutions involved in sports, as well as the organisation, governance and development of sports.

Spanish legal framework deals on the following issues:

- [Spanish Sports Federations](#)
- [Sports Companies](#)
- [Protection of health and anti-doping in sport](#)
- [Fight against Violence](#)
- [For sports policy](#)
- [High Performance](#)
- [Sport](#)

The **Superior Council of Sport** (CSD), defined in the 10/1990 Law on 15 October sport as an autonomous body of an administrative nature, which holds the performance of the state administration in sport. According to the Royal Decree 355 / 2018 of 6 June, restructuring ministerial departments corresponds to the ministry of culture and Sport the proposal and implementation of government policy regarding sport.

**The powers of the Higher Council of sports are:**

- Authorize and revoke a motivated the constitution and adopt the statutes and regulations of the Spanish Sports Federations.
- Recognize, for the purposes of this law, the existence of a sport.
- Agree with the Spanish Sports Federations its objectives, sports programmes, especially those of top-level sport, budgets and organizational structures and functional, adhering to the effect the corresponding conventions. Such agreements have legal nature - administrative.
- Economic subsidies granted to proceed with the sports federations and other entities and sports associations, inspecting and checking the adequacy of the same the fulfilment of the intended purposes in the present Act.
- Qualify official competitions and professional State level.
- Promote and encourage scientific research in sport in accordance with the criteria established by law of Promotion and overall coordination of technical and scientific research.
- Promote and support measures for prevention, control and repression of the use of prohibited substances and methods regulatory not designed to artificially increase physical capacity of athletes or modify the results of competitions.
- Coordinate with the Autonomous Communities on sporting activity general and cooperate with the same in the development of competencies that are attributed in their respective statutes.
- Allow or deny, with the approval of the ministry of foreign affairs, the celebration in Spanish territory official sports competitions of international character, as well as the involvement of Spanish selections in international competitions.



- Coordinate with the Autonomous Communities programming of school and university sports where national and international projection.
- Develop and implement, in collaboration with the Autonomous Communities and, in its case, with local entities, building plans and improvement of sports facilities for the development of the top-class sport, as well as update, within the scope of its powers, the existing technical regulations on this type of facilities.
- Develop proposals for the establishment of the teachings of minimum qualifications specialized sporting technicians.
- It is also collaborates in the establishment of programmes and curricula relating to such qualifications, recognize centres authorized to do so and inspect the development of training programmes in those autonomous communities that have not taken competences in education.
- Authorize multiannual costs Spanish Sports federations in cases by regulation expected, determine the fate of the net worth of those in the case of dissolution, control subsidies granted to them and to authorize the levy and dispossession of their properties if they have been financed wholly or partly with public funds in the state.
- Continuously updated the census of sports facilities in collaboration with the autonomous communities.
- Register Sports companies in the register of sports associations, regardless of their registration in the records of the autonomous communities.
- Register Spanish sports federations in the corresponding Sporting Federations of international character.
- Collaborate in environment and defense of nature with other government agencies with competences in this and federations especially related to those.
- Any powers attributed legal or regulatory that contributes to the achievement of the aims and objectives set forth in the present Act.

Source: <https://www.csd.gob.es/>

#### - **Catalan Level (regional)**

Due to the particular construction of the Spanish state, not only the regulations enacted by the Spanish Parliament (such as Act 10/1990) need to be taken into

account in this respect: while Spain is a single sovereign state, it is composed of 17 regions or autonomous communities that are vested with a fair amount of autonomy and with competences to rule on very diverse issues, among them sports. Therefore, some particularities may be found in specific territories as a result of the powers granted to regions to rule on sports matters.

The Catalan legal framework on sport is under the [Catalan Sports law](#) and its purpose is the organization of the legal regime and the institutional organization of sport in Catalonia and the regulation of sports jurisdiction.

- Object:
  - a) The promotion, dissemination, planning and coordination of sport.
  - b) The execution, advice and implementation of the practice of physical activity and sport throughout Catalonia, at all levels and social levels, in order to realize the right of every citizen to develop or to exercise their physical, intellectual and moral faculties, through free access to physical training appropriate to the practice of sport.
- Subjects:

To promote sport to all Catalan citizens, as it has exclusive competence, according to the statute.
- Obligations:

The profession of sport is understood to be the profession that is practiced in the various fields of sport, through the application of knowledge and techniques specific to sport.

Types of professions recognized in this law:

- Physical education teachers. This profession makes it possible to teach at the levels of education corresponding to the students and to carry out all the instrumental or derived functions, such as planning, programming, directing, tutoring and evaluating the teaching activity within the framework of the basic legislation. It also allows for the promotion, planning, programming and evaluation of school sports activities that are scheduled and practiced in schools outside of school hours.
- Professional sports animators or monitors. This profession in a given sport allows you to perform functions of sports instruction, training,

animation, fitness, improvement of fitness, control and other similar functions with respect to people who learn and practice this sport, if this practice is not focused on competition.

- Professional coaches. The profession of coach of a particular sport allows you to train, select, advise, plan, schedule, direct, control, evaluate and monitor athletes and teams with a view in competition.
- Sports directors. This profession allows the exercise of the set of professional activities related to the promotion, direction, management, programming, planning, coordination, control and supervision, and similar functions, in sports centers, services and establishments, both publicly and privately owned, applying the knowledge and techniques of the sports sciences.

The exercise of regulated professions requires the prior contracting of a civil liability insurance that covers compensation for damages that may be caused to third parties in the provision of professional services. The minimum contents of the policies are established by regulation. Failure to take out liability insurance is considered a serious administrative offense.

This law is only applicable to professional practice in the territorial scope of Catalonia, although not all professional practice in Catalonia is subject to it. Also, the Law addresses the profession of teaching physical education in all cycles, stages, degrees, courses, levels at which the education system is organized. Sports activities are part of the so-called leisure industry, recreation, leisure time, health, tourism, or aesthetics, and this has led to the birth of many occupations around sport.

## *4.2 National and regional strategies and strategic objectives for the improvement of the sports sector*

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### **- National Level**

The latest CSD, national strategy and main focus in Sport Spanish Policy from 2018 is based on the following topics, with most of the times are implemented through national strategies:



- Woman and sport
- Inclusion in sport
- Eradication of violence in sport
- Good governance
- Transparency in sport federations
- Equal opportunities policy between man and woman in Sport
- Promotion healthy habits through sport and fight against obesity

**More specific projects leaded by CSD:**

1- [Physical Activity and Sports Integral Plan](#)

The main national strategy on sport promotion, presented in 2011. The Plan A+D is a tool for permanent analysis of the reality of the practice of physical and sports activity for the whole of the Spanish population that allows to implement the proposed actions that improve the reality.

2- [The Spanish Agency for the Protection of Health in Sport](#)

The intention of bringing together all the competencies that the previous system distributed among different entities.

3- High Performance Sport in Spain

Are state-owned and / or autonomous sports facilities whose purpose is to improve sports performance by providing high performance level athletes the best training conditions and paying priority attention to the training needs.

4- CSD Training and formation in sport for sports federation qualifications.

**- Catalan Level**

At the regional level, there is a **White Paper on Sport made in Catalonia** in 2003, which is out of use.

The strategy of the sports sector in Catalonia is made by The General Secretariat of Sport and Physical Activity, which is the body of direction, planning and execution of the Sports Administration of la Generalitat (Government of Catalonia) and it is responsible for:



- To promote and monitor interdepartmental projects and programs in the territory related to the sector of physical activity and sports.
- To carry out the economic, financial, and budgetary monitoring of the entities attached to the Department of the Presidency through the General Secretariat of Sport.
- The strategic plans elaborated by the General Secretariat of Sport are:
  1. Master Plan for Sports Facilities and Equipment of Catalonia (PIEC)
  2. Strategic Plan for the Sport in Schools in Catalonia (PEEC)
  3. Strategic Plan of the University Sport of Catalonia (PEEUC)
  4. National Plan for the Promotion of Physical Activity (PNPAF)
  5. Strategic Winter Sports Plan of Catalonia

#### - **EU Level**

As EU level it also exists a **white paper on Sport** published in 2007. It was presented in July 2007 and was the first global initiative on sports.

The White Paper points to several **objectives**, such as improving the social function of sport, promoting public health through physical activity, promoting volunteer activities, and improving the economic dimension of sport, sport and the free movement of players, the fight against doping, corruption and money laundering, as well as the control of broadcasting rights, among many others. The White Paper focuses on the economic dimension of sport and its organization in Europe, as well as the role that sport plays in society, highlighting its educational dimension its social, cultural function, recreational.

The **key dimensions that are defined on the white paper**:

- Improving public health through physical activity
- Joining forces in the fight against doping
- Strengthening the prevention and fight against racism and violence
- Exchange of values with other parts of the world
- Support for sustainable development
- Optimizing the role of sport in education and training
- Promotion of volunteering and active citizenship through sport

- Harnessing the potential of sport for social inclusion, integration and equal opportunities

Sport is part of the wider EU policy agenda, which includes achieving the EU's social and economic goals. Since 2011, the Commission and EU countries have worked together on the basis of multiannual work programmes agreed by the Council (EU Work Plan for Sport 2011–2014; EU Work Plan for Sport for 2014–2017; EU Work Plan for Sport for 2017–2020), which set priorities and define the principles underpinning cooperation.

At EU level, there is also **EPSI** (European Platform for Sports innovation), from which INDESCAT is member. EPSI is a Non-for-profit European association (ASBL) based in Brussels (Belgium), focused on innovation in sport, leisure, health, tourism and more and striving for a more innovation-friendly environment to stimulate businesses development. They base their services in three pillars:

### **1- LOBBYING & EDUCATION**

Though their activities, they influence policy makers to increase political attention and investments towards sport and physical activity. In particular, They focus on:

- Influence policy makers at European, National, Regional and Municipal level to increase political attention towards sport and physical activity.
- Increase public investments into sport.

### **2- FUNDRAISING**

EPSI activities aims to create, engineer, coordinate or manage European, National, or regional projects with dedicated financial investments.

### **3- BUSINESS CREATION**

EPSI supports, facilitates business creation among its members based on their strategic development agendas, facilitating match-making in several ways. EPSI creates new business opportunities among its members and chances to grow.

### 4.3 National, regional and EU funds available for the sports sector

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At the EU level, there is a guide published in 2017 developed within the framework of the EU4SportsClusters Alliance project, in which INDESCAT was the coordinator. The [Guide on EU funding for the Sports Industry](#) was conceived as a practical tool for any European sport stakeholder interested in new and innovative projects with EU funding support. Due to the diversity of sports sector needs and areas of intervention (i.e. SMEs' competitiveness or expansion into new markets, sports related to tourism products, social inclusion of more vulnerable groups like migrants or refugees, gender equality, combating doping or match-fixing, developing new dual careers services, etc.), the Guide on EU Funding for the Sports Industry intends to facilitate the identification and characteristics of the main EU funding programmes tackling the topics mentioned earlier.

- **Consejo Superior de Deportes (National level)**

There is an aid program for [Sport Federations](#)

- **Sports council – Generalitat de Catalunya**

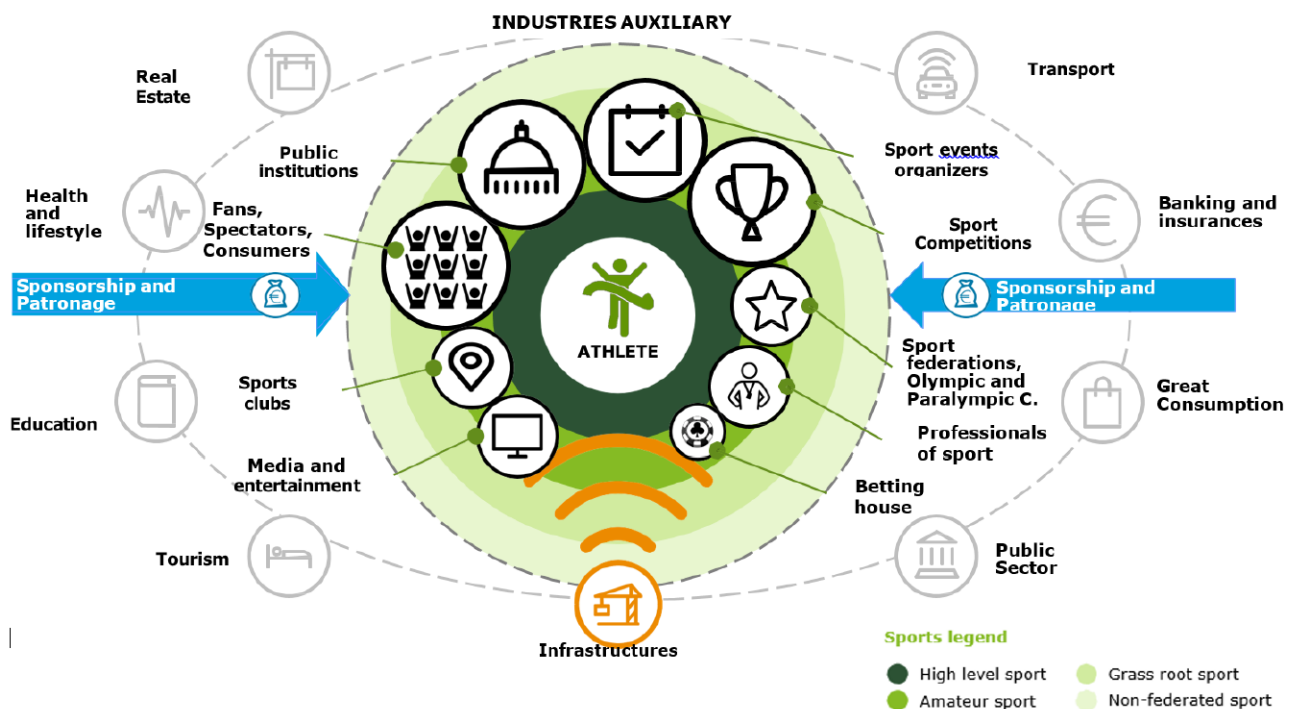
- o [Grant to palliate the COVID impact on sport facilities and sport Federations](#)
- o [Grants for the organization and participation in federated sports activities](#)
- o [Subsidies for carrying out sports activities and events that have a significant impact on the whole sports system in Catalonia or of social and historical relevance](#)
- o [Subsidies for the sports councils of Catalonia \(school\)](#)
- o [Justification of subsidies for the construction or conditioning of sports equipment for different programs](#)

Sport companies also can benefit from other general grants and subsidies available as the sport sector is cross sectorial. To “mitigate the impact of the effects of the pandemic” in the sports sector, the Generalitat has driven the National Plan for the Reactivation of Physical Activity and Sport in Catalonia, a set of actions that are summarized with an economic injection in subsidies, programs and lines of financing to preserve the viability of clubs, entities and federations.

All private companies interviewed stated that the lack of help have driven some companies to economic downturns and had to make job cuts, as some segments such as sport events have not been able to resume their business yet.

## 4.4 Mapping of current activities and initiatives

The main stakeholders involved in the sports sectors:



Source: sport ecosystem in Spain (Deloitte; p12)

**Public sector:** Sport Federations, Universities, Tourism sport promotion.

**Private sector:** From INDESCAT we divide the sector within the following segments:

### 1- Events

- Sports consulting and training: ITIK consulting, ATLAS, STC, PWC, Deloitte, KPMG



- Event organization: RPM, Agenda, MIC, OCISPORT, SEVENMILA, OFFLIMIT, Cosmos, Tennium.
- Media: Mediapro, Playbook, Palco23
- Event based services: Players, 3Ddigital, ISS.
- Competition teams: Football Club Barcelona, RCD Español, CF Girona, Real Madrid, Athletic Club Bilbao, La Peña, F.C Sevilla, Betis Balonpie, Estudiantes, Baskonia.

## **2- Facilities**

- Facility construction: IDOM, ACS, ACCIONA, Fluidra, Myrta Pools
- Facility Equipment: TP Sports, STAFF, Thomas Wellness, Daplast, Royalverd, Fieldturf, Sport and Landscape, Fluidra, Blautec, Mondo Iberica, Lausin Y Vicente, Decan Sports Equipment.
- Facility management: Sintagma, Eurofitness, CET 10, Claror, Forus, Viva Gym, ASME, Metropolitan, Holmes Places, Accura, DIR.

## **3- Sports goods and services**

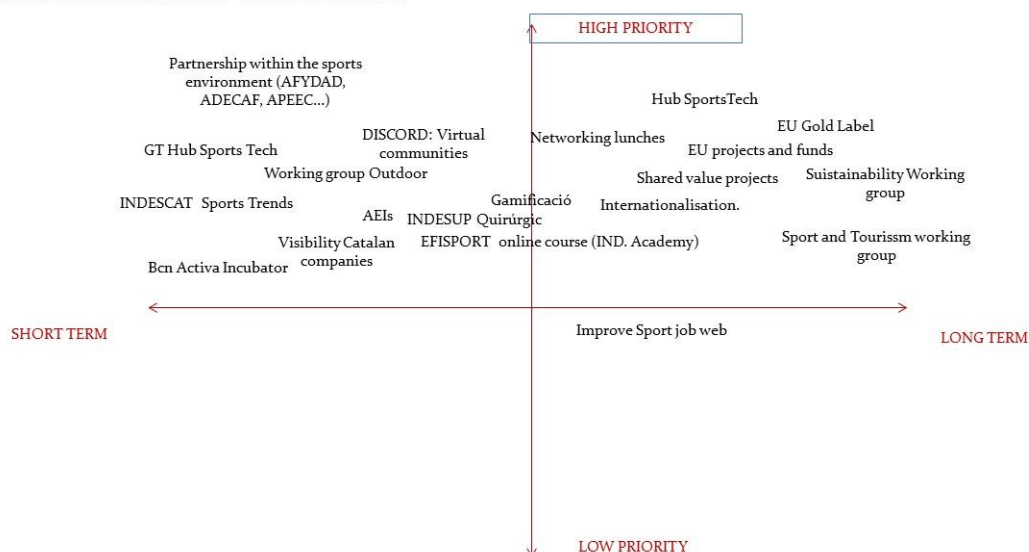
- Health and Nutrition: Nutrisport, Santiveri, Alimmenta, Bewell
- Tools and instruments: Onalabs, Podoactiva, Proinertial, ELKSport, B2B sportmas, Andjoy, competize, Skitude
- Clothes and accessories: BUFF, Munich, Turbo, Mistral, Swimrun, Tactic, Grifone, Bubble, Chiruca, Bestard, JOMA, Luanvi, Trangoworld, Ternua, Mundsocks, Yuma, Laken, Calzados Boreal, Joluvi, Tsunami.
- Health, wellness and performance: Salter, Aerobic and Fitness, Technogym, BH Fitness, Precor, Pavygym, Paviflex, Bodytone, Ojmar, Keya, ESHI, Bodytone International Sport, OSS Fitness, Telic.
- Active sports tourism: Roc Roi, Agenda, Patronat Costa-Pirineus, Cluster Andorra.
- E-games: SevenMila, Edojo, Sportia, United Gamers, BIG-C, Emonkeys, ASOVU.

## 4.5 Mapping of current activities and initiatives

The following chart made by INDESCAT describes the existing Networks and support mechanisms for sport companies in Catalonia:

- 1- Partnerships with all the sport associations such as: AFYDAD, ADECAF, COPLEF
- 2- Creation on the INDESCAT trends within the sport sector. INDESCAT presented to the members 28 innovations and trends from all sorts of companies from the sport sector, so to learn best practices and new distribution channels, platforms, tc.
- 3- Working groups. From INDESCAT we launch working groups in specific thematic areas (Fitness, Outdoor, Sport tourism) with a top-down approach with companies and related sport actors to help to know the necessities for these segments.
- 4- BCN ACTIVA incubator Sports Up: INDESCAT is one of the collaborating entities of the new Sport-Up program, which has been launched by the Barcelona City Council and which will be led by Barcelona Activa. The project aims to support the creation and growth of companies in the innovative and technological sports industry sector with a global vision in Barcelona.
- 5- Hub sports tech: a hub of sport and technology created by Barcelona City Council that was born with the purpose of making Barcelona and Catalonia an international reference in the exchange of knowledge, talent, resources, and capacities for innovation in the relationship between sport and technology. INDESCAT has been involved on its creation as an essential agent in the sports sector.
- 6- EU projects and funds. To help SMEs to boost internationalisation, improve learning capabilities, innovation funds for new projects.
- 7- Networking activities to encourage relationships between all industry members to generate business opportunities.
- 8- Organisation of webinars for the sport industry

## REGIONAL MAPPING OF ACTIVITIES:



1

## 4.6 Barriers and drivers

INDESCAT has evaluated the Stakeholders barriers and drivers by interviewing our members as we are a cluster led by private entities within the sport sector. In order to know the NEETS point of view, we have taken the information through desk research and studies specifically carried out about the jobs' skills and drivers.

### Stakeholders' view on barriers and drivers

#### 1- Barriers:

- Cross sectorial sector which is exceedingly difficult to deliver specific training and education skills.
- Sport has not got a ministry on its own, but it is shared with other industries, thus favouring the lack of financing and research.
- Overqualification of the people employed and therefore high rotation jobs and difficulties on retaining people.
- Harmonization of the sector of the sport in order to adequate frame the different professions related, is really needed at national level, not only at

regional level. Difference between regions in this issue make overly complex the coordination of the sector with regards to training and skills.

- Lack of research on the impact of the sports sector on the economy and employment.

## **2- Drivers:**

- The link between sport and health, which got high relevance during the Pandemic. Sport habits of Spanish population are still below the EU average, but general population is more conscious of practicing sport increases the mental and physical wellbeing.
- In recent years, the sports sector is growing according to the available statistical data and professionalizing and evolving according to the opinion of the respondents, which implies a greater demand for professionals, as well as the need for greater qualification of them and a change in the competitions that are going to be demands.
- Gamification of the sector as a drive to attract more people.

## **NEETS**

### **1- Barriers**

- High unemployment rate amongst young people. The immediate, difficult-to-solve problem is the chronic situation of a major part of the unemployed workforce, which has been without work for over a year.
- High temporary contracts which is much higher than the EU average.
- Part time contracts. Sixty percent of the people who work part-time in Spain do not do so from choice, but because, essentially, they were unable to find full-time employment. (Barcelona Activa). According to Eurostat, Spain is the EU country with the fourth highest ratio of people who are forced to work part-time because they have not found anything better, coming after Greece, Cyprus and Italy. The average for Spain is double the average for Europe (27.7%).
- Overqualification. This phenomenon normally refers to young people who have studied higher education, but who are working in jobs where that level of education is not considered to be necessary. In Spain, the Asembleo association, a group of businesses

dedicated to temporary work and placement agencies, affirms that seven out of ten people (68%) under the age of twenty-five are overqualified for the job they are doing.

- According to the Third Sector Round Table (we represent all Catalan social organizations, defend social rights and fight to eradicate poverty and reduce inequalities in Catalonia), which brings together 3,000 social organisations, 11.2% of workers in Catalonia live on an income that places them on the poverty threshold.
- Deficit on search for sport jobs and information with regards to the sport sector.

## **2- Drivers:**

- The appearance of new job skills due to new professions such as: e-gamers, digital event organizer and creator, fan engagement, sustainable sport events director.
- The recuperation of a sector that has been deeply impacted by the COVID.

## *4.7 Supporting mechanisms related to skills development*

From the interviews conducted to our members, we need to mention that, apart from the regulated education specialised in sports, there is no a policy for the skills development as such. Sports is a cross sectorial industry, for this reason the sports skills development fits into general programs. For example, they mentioned that in Catalonia there is an initiative called Barcelona Digital Talent, which promotes the competitiveness of the market by working to reduce the current gap in digital talent. With the goal of positioning Barcelona as a talent capital, the program promotes professionals' reskilling in digital competences and seeks to attract new professionals in the market both locally and internationally.

With regards to the barriers of skills development 80% of the companies stated that historically, sport and its competences have been related only to coaches and trainers skills development, but in recent years, sport-related profiles also cover other value

chains such as sport events workers, facility managers, product and service developers. For this reason, competences such as management, digital skills and event production have not yet been developed. Fortunately, this is changing and, little by little the specialisation within the sport sector is becoming more important and so the barriers are beginning to disappear.

Companies related to fitness, training camps, sport tourism events answered that there are training systems for the skills development within this segment for trainers and coaches. This regulated training is made by The Catalan School of Sport, attached to the General Secretariat of Sport of the Department of the Presidency, and is the competent body to regulate the training and qualifications of technicians and specialists in physical and / or sports. The course consists of 50 hours divided into two blocks: the common block of 15 hours and the specific block of 35 hours to choose from 7 models.

With regards to the support of the government and the competences needed for the employment we have divided the information

## **EVENTS**

1. What is the support of the government in sports sector? (from 1 to five)

The majority of the companies answered 2 as they got deeply impacted by the COVID have not received many help and still have not resume their business.

2. What are the competencies needed for the employment in the sports sector?

Adaptability, proactive and organised.

## **CLUBS & FEDERATIONS**

1. What is the support of the government in sports sector? (from 1 to five)

Most of the clubs and federations are public funded, so they answered 4.

2. What are the competencies needed for the employment in the sports sector?

Resilient, adaptability and communication.

## FACILITY MANAGERS / GYMS

1. What is the support of the government in sports sector? (from 1 to five)

The average was 3 and mainly because the public have not been able to attend to games which is where most of the revenue is earned. And for the gyms have been public restrictions.

2. What are the competencies needed for the employment in the sports sector?

Complex problem-solving, organized, leadership.

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## 5 Regional Conclusions

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The entire sports ecosystem will need new mechanisms to deal with threats to closure, difficulties in financial and business continuity arising from disrupted cash flows, legal and insurance challenges, and possible impacts on longer-term attendances and engagement. We will also have to deal with young long-term unemployment and think how to fulfill the sport skill gap.

Some considerations to bear in mind:

- The Catalan sector of physical activity and Catalan sport is a complex system and highly and highly cross-disciplinary
- The possibility to use the EU funds for the sport companies
- The disruption of new job opportunities in a more digital environment
- The difficulty to overcome the high unemployment rate amongst young people
- All the companies emphasized that, in an environment as complex and dynamic as the current one, the future of any sport company will depend on its ability to innovate, being thus highly important within the company, either by searching new business opportunities or by restructuring the company
- Some of the new opportunities in the sport sectors that the companies responded are as follows:
  - Considering the role of digital and social platforms to deliver and monetize services, one-on-one digital engagement, etc. (mainly answered by the fitness and facilities centres, universities, etc.).

- The e-sports sector has a great opportunity to continue its growing trajectory. Thus, there are many more potential spectators online, through the different digital streaming platforms. The main e-sports platform, Twitch, increased by 75% in April the audience of contents in Spanish.
- Managing fans to return to stadiums and venues with the threat of additional outbreaks and societal uncertainty.
- Sustainability: producing more sustainable products and sports events.
- Finding and opening new markets and internationalizing sales in order to have a broader scope.
- Attracting local sports practitioners (Spain and Catalonia) to tourism sport events.
- Gamification and involvement.
- Services related to healthy active living for the population are important focus fields.



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## 7 Annexes

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### 1. *Annex 1. Questionnaire for the online survey*

1. What are the competencies needed for the employment in the sports sector? (mention 3)
2. Are there any funds dedicated to the sports sector every year?
3. Are there any barriers for the skills development in the sport sector? If yes, please describe.
4. Are there any supporting mechanisms related to skills development for the sports sector? If yes, please describe.
5. Is there any training system for the skills development in the sport sector? If yes. Please describe.
6. What has been the impact during the COVID on turnover/profit: Improve revenue/No impact/Limited loss/Significant loss/Large loss
7. Did you or do you plan to restructure the workforce during the COVID?
8. If yes, which percentage the workforce?
9. Have you cut back on expenses? Which?
10. How do you foresee the next 6 months/next 12 months/next 24 months
11. Improve revenue/No impact/Limited loss/Significant loss/Large loss
12. Will you have to change and adapt to new reality, which are the immediate challenges?
13. Do you foresee new opportunities for your business?

## 2. Annex 2. SWOT Analysis

	HELPFUL	HARMFUL
	STRENGTHS	WEAKNESSES
INTERNAL ORIGIN	<ul style="list-style-type: none"> <li>- Barcelona is well positioned as sport capital and OOGG legacy.</li> <li>- Internationalization and benchmarking of the Catalan sport companies.</li> <li>- INDESCAT as a main drive for sport innovation, internationalization, and networking.</li> <li>- Transversality of the sector.</li> <li>- Sport is a very dynamic and fast-growing sector.</li> <li>- Catalonia as a reference for the sport start-ups.</li> <li>- Promoting values and education.</li> <li>- High quality sports facilities.</li> <li>- Traditional Catalan sport culture for non profit sport organisations (clubs and Federations)</li> </ul>	<ul style="list-style-type: none"> <li>- Difficulty to reach and search new international markets.</li> <li>- Cross-cutting across the sector makes it difficult for specialised programs.</li> <li>- Not enough financing resources to start new projects.</li> <li>- Change on the new industrial trends, digitalisation, and sustainability.</li> <li>- Keep the talent in-house.</li> <li>- Low investment in R&amp;D.</li> <li>- Lack of sharing business good practices.</li> </ul>
	OPPORTUNITIES	THREATS
	<ul style="list-style-type: none"> <li>- Investigation of new markets, both emerging and more mature for the sports sector.</li> <li>- Networking / exchange of best practices between exporting companies.</li> <li>- Great opportunity to cooperate and exploit new synergies.</li> <li>- Presentation of European project proposals to international aid lines.</li> <li>- Create new cross-sectorial projects with different sport players.</li> <li>- New emerging sectors such as e-sports, exergaming.</li> <li>- Virtual fan engagement.</li> </ul>	<ul style="list-style-type: none"> <li>- SME reluctance to provide data for monitoring.</li> <li>- Too much offer from too many associations.</li> <li>- Economic crisis.</li> <li>- Overcome the COVID crisis.</li> <li>- High unemployment rate.</li> </ul>

	<ul style="list-style-type: none"> <li>- Online channels open new access to new markets.</li> </ul>	
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### 3. Annex 3. PESTLE Analysis

	External factors to consider	Factors affected within sports industry	Importance (High - Medium - Low)
<b>POLITICAL</b>	Government policy Political stability Industry regulations Global agreements etc.	<ul style="list-style-type: none"> <li>- Political factors are driven by government initiatives and has power on the operations and administration of sports.</li> <li>- Promotion of Catalonia as sport tourism destination.</li> <li>- Most of the sports facilities are of public investment.</li> </ul>	High
<b>ECONOMIC</b>	Globalisation, Interest rates, Employment or unemployment rates	<ul style="list-style-type: none"> <li>- High impact of the COVID on the turnover of the sports companies.</li> <li>- Lost of sports jobs due to the COVID.</li> <li>- High unemployment rates and even more in young population which are the drive force of the sector.</li> <li>- Economic drivers influence the industry, and it is tied together with consumer behavior</li> </ul>	High
<b>SOCIAL</b>	Lifestyle factors Career attitudes Work-life balance Population Demographics Education levels, Cultural trends, Attitude changes and changes in lifestyles	<ul style="list-style-type: none"> <li>- Sports events are highly affected by consumer behavior, thus economic crisis.</li> <li>- Increase of the home fitness.</li> <li>- Increase of the practice during the COVID</li> </ul>	Medium
<b>TECHNOLOGY</b>	Automation		High

	<p>Innovation Social networking Upgrades Artificial Intelligence Security Changes in digital or mobile technology</p>	<ul style="list-style-type: none"> <li>- High demand on new technologies applied to the sport sector.</li> <li>- New way of consuming sports through different platforms.</li> <li>- the consolidation of the egames.</li> <li>- Social media platforms increasing usage and makes fans to connect with their favourite athletes and teams.</li> </ul>	
ENVIRONMENTAL	<p>CSR (Corporate social responsibility) Ethical sourcing Transportation Future pandemics Climate, Waste disposal and sustainability.</p>	<ul style="list-style-type: none"> <li>- High demand of sustainability issues in sport events and facility buildings.</li> <li>- Nowadays people are more aware of our environmental situation and evade any plastic or non-recyclable materials and carbon emission.</li> <li>- Shared Value and its triple impact (economic, sustainable and social)</li> </ul>	High
LEGAL	<p>Employment legislation Common law Local labour law Health and safety Regulations</p>	<ul style="list-style-type: none"> <li>- Each country has its own legislation on sport leagues.</li> <li>- Own legislation for coaches and trainers</li> </ul>	Medium