



ESSA-SPORT

Improving the Supply of Skills to the Sector

NATIONAL REPORT

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



Netherlands

September 2019

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This national report has been produced by “*WOS - werkgevers in de sport*” 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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ESSA-SPORT
Improving the Supply of Skills to the Sector

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**THE ESSA-SPORT PROJECT
AND BACKGROUND TO
THE NATIONAL REPORT**

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

a) The ESSA-Sport Project

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

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




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

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

b) The National Report

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

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

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

c) The sport and education system

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

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

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

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

d) Sport Labour Market Statistics

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

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

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

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

e) European Employer Skills Survey

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

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

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

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

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

f) Consultations and conclusions

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

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

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



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**NATIONAL KEY FACTS
AND OVERALL LABOUR
MARKET**

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

a) National key facts and data

1) General information

Country name	The Netherlands
Geographical size	41 542 km ²
Capital city	Amsterdam
Official Language	Dutch
Population	16.979.120
Neighbouring countries	Denmark (North), Germany (East), Belgium (South), United Kingdom (West)



2) Political information

Political system	Parliamentary Constitutional Monarchy
EU Member	Yes, since January, 1st, 1958
Schengen area member	Yes, since March 26st, 1995
Seats in EU parliament	26

The Netherlands is a parliamentary constitutional monarchy with a head of government - the prime minister - and a head of state - the monarch. A council of ministers holds executive power. The country is divided into 12 provinces and 388 municipalities. It is also divided into 22 water districts, governed by an executive board that has authority in matters of water management. The Netherlands also includes 6 overseas countries and territories in the Caribbean. These territories are not part of the EU.

3) Economic information

Currency	Euro, €
Eurozone member	Yes, since January 1st, 1999
Gross domestic product:	€1.319.901.000.000
Inflation rate	1.4%
Unemployment rate	3.6%
Important economic sectors	Wholesale and Retail Trade; repair motor vehicles / motorcycles
Human Health and Social Work Activities	
	Administrative and Support Service Activities
	Manufacturing

The most important sectors of the Netherlands' economy in 2016 were public administration, defence, education, human health and social work activities (21.4 %), wholesale and retail trade, transport, accommodation and food services (21.2 %) and industry (15.2 %). Intra-EU trade accounts for 76% of the Netherlands' exports (Germany 24%, Belgium 11% and United Kingdom 9%), while outside the EU 4% go to the United States and 2% to China. In terms of imports, 47% come from EU Member States (Germany 15%, Belgium 8% and United Kingdom 5%), while outside the EU 14% come from China and 8% from the United States.

b) Characteristics of the overall labour market

Table 1. Total active population and data on unemployment and employment

	TOTAL ACTIVE POPULATION	TOTAL UNEMPLOYED PERSONS	NUMBER OF PERSONS IN EMPLOYMENT						
			TOTAL EMPLOYED PERSONS*	BY GENDER (%)		BY AGE (%)			
				Female	Male	15-24	25-54	55-64	65+
2016	8,942,000	538,000	8,403,000	46.3	53.7	14.5	66.2	16.8	2.1
2015	8,907,000	614,000	8,294,000	46.2	53.8	14.9	66.6	16.3	2.1
2014	8,874,000	660,000	8,214,000	45.9	54.1	15.0	67.3	15.8	2.3
2013	8,913,000	647,000	8,266,000	46.2	53.8	14.8	67.9	15.4	2.0
2012	8,846,000	516,000	8,330,000	46.1	53.9	14.4	68.4	14.9	1.9
2011	8,414,000	434,000	8,280,000	46.1	53.9	14.8	69.2	14.4	1.5
2010	8,713,000	435,000	8,278,000	45.7	54.3	14.7	69.9	13.8	1.5
<i>Please indicate the source</i>		National Statistics Office, Den Haag/Heerlen 4-4-2017 Sources							

Table 2. Total population per gender and categories of age

	TOTAL POPULATION	BY GENDER (%) 1.		BY AGE (%)				
		Female	Male	0-14 2.	15-24	25-54 3.	55-64	65+ 4.
2016	16,979,120	50.4	49.6	16.5	12.2	40*	13.1*	18.2 (100)
2015	16,900,726	50.5	49.5	16.8	12.2	41,7*	12,8*	17.7 (101.6)
2014	16,829,289	50.5	49.5	16.9	12.2	39.9*	13*	17.4 (99,4)
2013	16,779,575	50.5	49.5	17.2	12.2	40.9*	12.9*	16.8 (100)
2012	16,730,348	50.5	49.5	17.3	12.3	41,2*	13*	16.2 (100)
2011	16,655,799	50.5	49.5	17.4	12.2	41,6*	13,2*	15.6 (100)
2010	16,574,989	50.5	49.5	17.6	12.2	38.7*	12,9*	15.3 (96,7)
<i>Please indicate the source</i>		Centraal Bureau voor de Statistiek, Den Haag/Heerlen 29-3-2017 Sources Sources						

Table 3. Total number of employed persons per economic sectors (NACE Rev.2 Codes)

NACE CODES – SECTIONS	TOTAL NUMBER OF EMPLOYED PERSONS					
	2011	2012	2013	2014	2015	2016
A - Agriculture, forestry and fishing	99,500	98,100	98,500	97,500	96,300	95,900
B - Mining and quarrying	8,000	8,600	8,600	10,700	11,400	11,000
C – Manufacturing	769,200	761,900	753,100	739,200	739,900	735,500
D - Electricity, gas, steam and air conditioning supply	22,800	26,100	26,300	26,700	26,000	27,000
E - Water supply; sewerage, waste management, remediation activities	37,500	37,600	37,600	31,900	32,800	32,300
F – Construction	371,400	360,600	342,700	313,600	302,200	296,800
G - Wholesale and retail trade; repair motor vehicles/motorcycles	1,294,200	1,311,500	1,309,700	1,290,800	1,304,100	1,304,100
H - Transportation and storage	377,000	379,700	376,000	368,600	364,300	364,300
I - Accommodation and food service activities	320,500	331,900	338,500	340,000	354,800	371,100
J - Information and communication	228,100	229,900	231,300	227,900	236,400	242,600
K - Financial and insurance activities	276,100	307,600	260,500	250,600	242,700	282,800
L - Real estate activities	74,300	70,800	69,000	67,100	66,400	64,600
M - Professional, scientific and technical activities	506,800	484,900	492,600	484,300	491,600	477,800
N - Administrative and support service activities	824,500	836,200	813,800	830,600	877,700	957,100
O - Public administration and defence; compulsory social security	534,100	522,300	509,900	511,700	588,000	540,100
P – Education	523,200	528,100	514,300	507,300	514,400	512,000
Q - Human health and social work activities	1,333,600	1,362,900	1,366,900	1,339,700	1,310,800	1,292,700
R - Arts, entertainment and recreation	133,900	132,900	130,500	127,100	129,500	128,000
S - Other service activities	153,700	146,300	141,600	135,800	129,500	129,900
T - Activities of households as employers and U-Activities of extraterritorial	0	0	0	0	0	0
<i>Please indicate the source</i>	Centraal Bureau voor de Statistiek, Den Haag/Heerlen 4-4-2017 Sources					



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3

**THE NATIONAL SPORT
AND PHYSICAL ACTIVITY
SECTOR**


















3. THE NATIONAL SPORT AND PHYSICAL ACTIVITY SECTOR

a) Configuration of sport and main stakeholders

1) Ministry and Law

The Ministry of Health, Welfare and Sports (HWS) is the responsible ministry for sport in The Netherlands. It has the authority to develop and enforce policy. Secondly, the ministry is responsible for financial endorsements in sports. Together with the Dutch government the Ministry has the possibility to create and enforce law to regulate sport. In The Netherlands, there are no specific rules which seek to regulate sport. The general law of The Netherlands must be used to solve possible problems. This can be summarised below:

Note that rules concerning foundations, associations and companies are disregarded.

-  *Labour law: The Dutch Civil Code (Book 7) is used for employment contracts, good employership and good employeeship, payments, holidays, (none) competition/ exclusivity, education cost clause, termination of contract, medical examination etcetera. Previous can be mentioned and worked out in the Collective Labour Agreement such as the CAO Sports, CAO Professional Cycling etcetera.*
-  *Working Hours Act, which regulates the maximum amount of hours an employee may work*
-  *Fundamental rights and Obligations like the right to work, Freedom of Speech, Right to privacy and Image Rights, Equal Opportunities and Civil & Criminal Liability.*
-  *Working Condition Act*
-  *Minimum Wage and Minimum Holiday Allowance Act which regulates that any employee is obliged to earn a minimum wage.*
-  *Foreign Nationals Employment Act (Wet arbeid vreemdelingen (WAV). Employees from outside the Europe (EER, exactly) needs a work permit. The permit has to be applied by the employer or its representative.*
-  *Placement of Personnel by Intermediaries Act (WAADI). This act concerns employment intermediation and player agents.*
-  *Social Security Acts like how to deal with work incapacity such (illness and disability) such as WIA, IVA and WGA), the Unemployment Act and rules concerning Pensions.*
-  *Works Councils Act: a set of rules which prescribe tasks, role and procedures about employee-participation*
-  *Good Governance Code: a set of rules which instruct sports clubs executive committees should behave.*
-  *Case Law Labour Law*
-  *Criminal law such as the "Hooligan law": this law makes possible tougher punishment of (football) hooligans.*
-  *World Anti-Doping Code: this Code obliged Dutch association's to create regulation concerning Doping according to the World Anti- Doping Code.*
-  *Collective labour agreements (such as the CAO Sport).*
-  *Internal regulations of the sport clubs/ associations for their members.*

To conclude, Dutch sports policy is influenced by the regulations of the European Union (EU) and the regional and global sporting associations.

2) National strategy of sport

Sport promotes health and brings pleasure, pride, and solidarity. That's why it demands attention. The attention is important because clubs and federations experience difficulties in finding volunteers. They also experience difficulties with regards to financial possibilities to further professionalise amateur and top sport. The Dutch government aims, together with the sport sector and municipalities, to enhance sport in financial and organisational ways. Federations and clubs that flourish maintain a central position in this strategy.



The following bullet points show the targets for the coming years.

-  We want to settle a sport agreement. Important partners for the agreement are federations, sport clubs, athletes with a disability and municipalities. The aim is to make the organisation and the finances of sport future-proof. In this area, part of it, also is diversity and the composition of federations, and the development of open sport clubs in neighbourhoods and a low-threshold excess for children. For the above, the government destinies 10 million Euro. The regulation concerning "Energy saving and sustainable energy sport accommodations" will be continued.
-  The government doubles the, in 2016 agreed, structural intensification for top sport from 10 million Euro a year to 20 million a year to improve the chances for the Dutch Olympic and Paralympics' teams. At the same time, there will be created more room for top sport talents to combine top sport and education.
-  The government reserves an amount of 5 million Euros extra for the support of the organisation of sport events such as the European Championship and the World Championships and other events.
-  The initiative for the organisation of an event always lies with the sport and her partners. The government will initiate dialogue with federations about maintaining the "public order" in case of events and how to deal with misbehaviour during events and matches with high risks.
-  The government has a firm focus on tackling doping use, match fixing, corruption and abuse in the sport.





In 2014, NOC*NSF already had the ambition to be part of the 10 best countries in the world concerning sport performance. Since then, NOC*NSF focuses on the proven successful programmes (equestrian sports, field hockey, judo, rowing, ice skating, cycling, sailing and swimming). Furthermore, the available resources are used for potential successful programmes. Municipalities need to economise on sport and assume sport accommodations to be self-reliant. At the same time, they focus on affordability of sport and accessibility for people with a low income and people who are disabled.

3) Sportagenda 2017

NOC*NSF and the affiliated Sport federations have developed the so called Sportagenda 2017+. The document describes two main ambitions:

-  A wide range of sport among the population, including high active sport participation
-  Excellent performance. Dutch talents act and perform on world level, which contributes to the Dutch position and power of innovation and inspires the Dutch population.



These two ambitions are translated and ordered into 4 topics (building blocks):

-  Sport (sector) development
-  Top Sport ("to win")
-  Sport Participation ("to participate")
-  Financing sports

For each building block is a description with effort to take, including goals, results, partners involved, financial resources, and possible conjunction with other building blocks. Finally, there is a part which gives



insights in the foundation a legacy of the main ambitions mentioned above. Sports existed and have always been there. Sport has a high impact and great value. This applies to top sport, amateur Sport and sport events. However, society changes continuously, in an increasingly fast pace. The sport world is also changing, organisations in the sector are changing and financial, historically grown, resources are under pressure. Previous developments influence the manner which the consumer experiences and practices sports. Sport participation is increasing but the way of practicing shows more diversity and flexibility. There is a gap between the current infrastructure in sport and today's and future questions.

This reality means action. The challenges the sport sector stands for are:

-  As many people as possible has to enjoy sport, actively and sustainable. It does not matter if they are member of a club or the sport is "unorganised". The ambition is to make sport accessible concerning when, where and how. Sport is not ours but belongs to everybody.
-  It is all about the individual (instead of the association or club)

1. Sport(sector) development

We want to create and contribute to perfect sports conditions in order to achieve excellent sport performances and a high level of sport participation. Therefore, a strong sector with firm, reliable actors is necessary. To keep our (leading) world position in terms of organising sport successfully and efficiently, we have to keep focusing on development and innovation. We want to continue building a sport sector that reaches (potential) athletes perfectly and serves them tailor made. This requires:

-  Effective and flexible organisations which are able to add value to athletes and sport clubs
-  More cooperation between sport federations and social partners as the government (on municipal and provincial level), business, sport organisations and organisations in other sectors.

2. Top sport





NOC*NSF and the sport federations strive to belong to the Top 10-sport countries in the world. They strive to achieve more medals in more disciplines and excellent sport performances with a huge impact. The Dutch government shares the goals mentioned above: The Netherlands strives to belong to the world's' top 10 best sport countries. Success of professional athletes contributes to these goals. This ambition is carried by the government and this is why the Dutch government wants professional athletes to perform better and stimulates sports. To realise these ambitions, NOC*NSF choose for a strategy which supports structural performance programmes and programmes with the potential to be so, with all available resources. This means that choices must be made. To determine which programmes will be supported, next steps are taken: recognise, focus and finance.

Recognise:

All sport disciplines of federations can be recognised on the basis of the so called Regulation Top Sport- and International competition sport discipline as a top sport or an international competition sport. In this step globalisation plays an important role. Recognition is confirmed over a 4 years period and does not automatically leads to top sport finance.



Focus

There is no right to receive financial support. To be eligible for applying finance, they meet 4 focus criteria:



-  Performance: The programme has potential to reach the 1, 2 or 3 position during World Championships or Paralympics or Olympic games in 2020 or 2024.
-  Names and back numbers: it is clear who are the top athletes and talents involved with the programme and also their performance perspective
-  Fulltime: The scope of the project 250 days (minimum). In case of team sport the 250 days has to include 90 days of supervision by the sport federation.
-  Commitment: The federation is responsible to pay 30% of the total costs from own budget.

Finance

NOC*NSF finances two focus programmes.









-  Top sport programmes 2020
-  Education Programmes 2024

At the same time NOC*NSF finances two other kinds of programmes:

-  Part-time performance programmes
-  Start ups

Four years ago the National Olympic Committee (NOC*NSF) chose to focus their support and funding their top sport programmes. Based on their choices as mentioned above, they continue to focus in multiple fields.

Compared to 2016, NOC*NSF focuses on:


-  Quality and quantity in worldwide competitive trainings programmes under supervision of sport federations starting from the age of 8 until the end of their career.
-  Programmes and adequate guidance for top sport athletes which contribute not only to their sportive performances, but also a dual career.
-  Funding and support aimed at supporting athletes in their focus programmes.
-  Making arrangements with athletes, federations and other stakeholders regarding behaviour and training to maintain a top sport status and trainings facilities.
-  Further integration and developing of Paralympics' focus programmes.
-  Structural gaining of quantitative, qualitative and financial data for focus programmes.
-  Efficient and transparent efforts and funding of specialists in focus programmes.
-  Permanent development and education of coaches, specialists and academies.

3. Sport participation

We have the ambition to increase sport participation. In the near history, in this case the membership of a sport club was very important. Nowadays, people also are active without memberships: their needs have changed. The infrastructure in the sport sector has to change to fulfil the population's needs. This means that maximising engagement; add value, customer satisfaction, and experiment new binding methods are new key factors in increasing sport participation. Furthermore, the Sportagenda 2017+ tells us that the ministry of Health, Welfare and Sport invests in:

-  *High-quality top sport and education programmes*

The Dutch government invests in high-quality trainings and competitive programs. The Dutch government also invests in talent developing programs and in the knowledge and skills of trainers and coaches.

-  *Stipendium for top sport athletes*

Stipendium are additional or income assurance replacements for top sport athletes who earn less than the gross minimum wage. Through stipendium, athletes do not have to worry over money and can fully focus on sports performance.

National centers for top sport and education (CTO's)

CTO's are national facilities for athletes where they can live, study and train on a full time bases. By combining everything for athletes in one facility, they can fully focus on their sport and education and do not have to worry about travelling or other side issues.

Flexible and talent education

Talent education is based on schools where talented athletes can combine their high school with top sport. These high schools adjust their schedules to the trainings programs of students. Through this combination of sport and education, talented athletes are supported to build up a career besides their sport.

Sport events.

The Dutch government wants to contribute in organising leading sport events in The Netherlands. Besides the organisation, the Dutch government also wants to maximize the social impact of sport events. There are many different policies regarding sport and physical activity in the Netherlands. The main policies indicated on the website of the Dutch Ministry of Health Welfare and Sports are:

Sport and physical activity in the neighbourhood:

Main priority is making sport available in the neighbourhood and accessible to ensure social inclusion. The policy pays special attention to children. Elements of this policy are: 1) neighbourhood coaches, 2) special subsidy for sport events, 3) knowledge exchange via websites, 3) funds for children of low income families, 4) sport and education, 5) healthy schools (schools can look up information on the special website), 5) education and sport clubs, 6) physical activity in the outdoors (making sure facilities are available to perform physical activities in the outdoors. E.g mini Soccer fields)

Sport and health and wellbeing:

The main priority is informing the population about health benefits from exercising and to encourage exercise and making sure sport can be played safely. Elements of this programme include: 1) National programme of prevention by providing enough supply of sport, 2) exercise half hour a day campaign, 3) programme to prevent sport injuries by providing information, 4) recognising sport medicine as a medical specialisation and sport doctor as medical specialist and 5) research of possible health hazard rubber pellets artificial grass fields.

Sport for people with a disability:

Main priority is social inclusion and developing self-confidence. The different elements in the policy are: 1) bondless activity (so people with disability can exercise sport close to home and look up possibilities) and 2) World Winter Games for athletes with a mental disorder.

Safely exercising sport:

The main priority is keeping sport free from violence, discrimination and threats and build expertise in countering these phenomenons. Different programmes include: 1) action plan to a safer sport environment, 2) establishment of martial arts authority and quality label and 3) plan of action ensuring durable swim safety Netherland in 2020 (for a better overview of quality and price of swimming diplomas).

Honest and sportsmanlike competition:

The main priority is countering doping and matches fixing practices and builds expertise in countering these practices. The elements are: 1) tributes to not honoured winners due to doping usage and guidelines how to deal with athletes with medals, 2) records and honourable members who later are caught using doping, national doping regulations, 3) legislation executing anti-doping policy, 4) national platform match fixing to build expertise 5) and international cooperation in sport.

Professional sport:

The main priority is to enhance high performance in regard to sports. Different elements include: 1) sport agenda 2017 of NOC*NSF, investing in professional sport and education programmes, 2) stipendia / scholarships for professional athletes, 3) creating professional sport infrastructure by the centre for professional athletes and education (living, studying and training), 4) flexible high school education and sport and 5) encourage holding international sport events in the Netherlands.

Sport events:

Main priority establishing the Netherlands as a sport country, encourage sport activities in society and profit from economical stimulants. Programmes include: 1) subsidies for organising sport events, 2) NOC*NSF designed a website where knowledge can be exchanged and 3) a Dutch Sport Council has been formally established.

Research and developments in sport:

The main priority is to enhance athletes' performance, stimulate exercising, make profits economically and ensure a healthier society. Part of the policy are: 1) investments in amateur and professional sport, 2) establishing platforms to allow business, science and government to cooperate and ensure Dutch supply meet foreign demand, 3) utilise events to present innovations, 4) collect and build statistics, 5) encourage technological development and innovations such as health apps, 5) sport research programme and 6) umbrella organisation allesoversport to collect all available information.

Responsibility and more information

In the Netherlands there are multiple organisations involved in implementing the national strategy of sports. These organisations are the ministry of Health, Welfare and Sports, regional and local government, schools, the Dutch anti-doping agency, local sport clubs, the National Olympic Committee (NOC*NSF) and other sport organisations. More information on the national strategy of sports in The Netherlands can be found on: <https://www.government.nl/topics/sports>

b) Main stakeholders

In The Netherlands there are many stakeholders involved in sports. It is near impossible to describe every stakeholder individually, so therefore a list of the main stakeholders will be presented including their role in Dutch sports.

1) National Olympic Committee

The Dutch National Olympic Committee (NOC*NSF) acts as the National Olympic Committee and as the Dutch Organisation of interests for organised sport. The National Olympic Committee wants to bring sport in The Netherlands to an Olympic level. NOC*NSF is therefore the federation of national sport federations who is responsible for an open, healthy, attractive and responsible sport branch for everyone. NOC*NSF realises their targets through specific support, collaboration and representing interests of their members. NOC*NSF is responsible for the national teams to participate in the Olympics and Paralympics and provides an

ambitious top sport programme. They act as a specialist on knowledge and contribute to the quality in sport on national and international level. It is the ambition of the National Olympic Committee to increase the participation in sport to 75% of the Dutch residents and make The Netherlands one of the top 10 countries in the world in sports.

2) Sport federations

Sport federations are the umbrella organisation for all clubs who provide a certain sport. Each sport therefore has its own federations. These federations represent the interest of a specific sport on national and international level and support clubs in their tasks to provide sport.

3) Local Authorities / Municipalities

Local authorities or municipalities are responsible for providing space and possible financial assistance for sport clubs. It is the task of local authorities to maintain public space and represent the interest of its residents. Local authorities are also responsible for the implementation of national policy and are therefore also responsible for regulations and law.

4) Private Sector

The private sector has no specific responsibilities or function in sport. They represent their own interest which is mostly aimed at making profit. The private sector uses sport more and more for social goods, like investing in local sport clubs to create publicity.

5) Sport Clubs

Sport clubs are responsible for providing actual sport and the facilities that are necessary for participating in sport. In The Netherlands, sport clubs primary consist of volunteers and people with the same passion and interest in a specific sport.

6) Grassroot Sports

Grassroot sports are defined as 'physical activity, organised and non-organised, practiced regularly at non-professional level for health, educational or social purposes'. Unlike in England, there is no separate branch for grassroot sports in The Netherlands. Most of the grassroot sports is described above. Beside the organised sport, there is also unorganised sport. People are more inclined to participate in sport in a flexible way, without traditional sports clubs. In 2016, the 3 biggest practiced sports were fitness (18%), walking (13) and running (10%). All of these sports are mainly practiced individually. Because people are less likely to participate in sport through traditional sport clubs, the Dutch sporting landscape is changing.

c) Economics of sports

1) Funding

The Dutch sporting system is funded through 4 primary systems: governmental funds, membership fees, Lotto funds and sponsorships. The first and biggest funds come from the government. The government divides their funds between provinces, municipalities and sport federations. Almost 90% of this funding goes to municipalities whereas they are responsible for their local sports policy and implementation of it. Almost 80% of the expenses of municipalities go to the maintenance of facilities and accommodations.

Secondly sports get their money from their own memberships. Sport clubs and sport federations use their own contribution system to get a steady cash flow. These memberships are important for sport clubs and federations to uphold their financial independence.

A third way to of funding sport is through the Dutch Lotto. This form of funding is based on the income of gambling. The Dutch national Lotto returns approximately 75% of their profits to sport by providing financial support for federations, charities and other sport initiatives. Because of the size of the gambling industry millions of Euros circulate in this form of funding. But recent years the gambling industry is declining, thus sport federations also receive less funding. As a result, federations are looking for new ways to raise funds and other ways of finance.

Professional sport clubs, athletes and big events like national championships also receive money through sponsoring. Commercial parties like Coca Cola, Gazprom and Heineken pay clubs and athletes to represent their brand during competitions. They invest money in return for brand recognition. But there is a new tendency ongoing where brands are shutting down their financial support and starting to invest in social projects. Instead of just paying for wearing their brand, commercial organisations invest in materials and support of local sport organisations. For example, the ING bank provides jackets and pylons for local football clubs and the Rabobank provides these for local hockey clubs.

In summary there are four forms of funding sport: governmental funds, membership fees, Lotto funds and sponsorships. Together these forms of funding support the majority of sport in The Netherlands.

d) Economic impact of sports

This information is taken from the rapport: de economische betekenis van sport in Nederland (2008) and the rapport de bijdrage van sport aan de Nederlandse economie of the CBS and the HAN, 2012. And from the Sociaal en Cultureel PlanBureau, 2014, p 122-142, "rapportage sport2014".

Narrow definition: The activities which are provided by sport clubs, fitness centers, sport accommodations, etc.

Broad definition: All parts of the industry that actively produce or offer sport activities as well as supplementary goods and services which are necessary for practices sport or stem from sport practicing.





1) Macro economy

The sport market characteristics are that it mostly exists from services thus less import and export takes place. Moreover, this market is less internationally oriented than other markets. In addition, there is less capital or investments in the sport market. The sport economy accounted for 1% of the total GDP in 2010. The GDP in 2010 was 524 billion euro. Between the years 2006 and 2010 the GDP slightly rose in absolute numbers from 5.4 billion to almost 6 billion euro. Nevertheless, proportionally the GDP remained around 1%. Even in 2012 the sport economy, the number was unchanged. The sport sector contributed 0.9% in the total production. The total production of The Netherlands was 1.1 trillion Euros in 2010. The production value was around 10 billion Euros. The sport industry produced around 2.8 billion. A reason for these numbers is that a lot of the production or value which is created takes place in the other sectors e.g. production took place in the education (PE lessons), policy and governmental services (rental of swimming pools and gyms), trade (retail), and restaurants / bars sector (drinks and snacks).

2) Micro economy

Of the total consumption 2.5% was spent on sport or sport related products and activities in 2012. This accounts for 11.7 billion Euros. 68% is spent by (professional and amateur) athletes. 8% by sponsors and 24% is spent by the government. In the period 2006 until 2012 the amounts spent on sport continued to sway around 2.5 percent. Although the consumption remained the same there has been a change in the consumption pattern. Relatively, the consumption of sport and fitness services, contributions, memberships and entrance fees increased sharper than other expenditures on sport. Moreover, households seem to have cut cost on sportswear and spend less on drinks and foods. Nevertheless, each household spend 1.100 Euros on sport which is around 93 euro a month.

Sport and activity tourism features in The Netherlands through big events. Those events can be divided into 4 subcategories;

-  *One day events,*
-  *Multiple day events*
-  *One sport event*
-  *Multiple sports events*

Because of the different nature of these kinds of events, it is hard to compare them and to outline specific outcomes of economic import of sport as a whole. There are currently no measurements in The Netherlands focusing on the economic impact of sport as a whole. To determine the economic impact of these kinds of events, research is done by multiple big research actors. Some of the biggest research partners in The Netherlands are the University of Utrecht, University of applied sciences of Arnhem & Nijmegen and the Team Evaluation Sport Events. The Team Evaluation Sport Events provides guidelines for objectively measurements of evaluation. One of these guidelines specifically aims at the measurement of economics impact of sport events.

Note: Because of a lack of recent data, the following data dates back to 2006.

The Dutch population spent almost 11.4 billion Euros on sports. This corresponds with 1.3% of the overall spending of the Dutch economy. The majority consist of spending of households (6.8 billion Euros) and the Government (2.6 billion Euros). On the other end of the spending, the production of sport related products and services provided The Netherlands with 9.2 billion Euros. This corresponds with 0.9% of the Dutch overall production. The exportation of sport related products provided 1.6 billion Euros, whereas the importation of sport related products and services took 1.8 billion Euros.

The added value of sport in The Netherlands is estimated around 4.7 billion. Expressed in the gross domestic product, the added value of sport corresponds with 1% of the Dutch economy. 1.5% of all the Dutch working people are working in sport. The biggest difference with other economic sectors is that most people in sports are working part time. Therefore, the labour volume (the amount of labour expressed in labour years) lies lower in sport.




e) Sport for other agendas

1) Sport as health policy

Sport more and more is used for a health strategy. The programme called National Program Prevention (NPP) ensures people to live healthy. The sport sector can contribute to this goal to make sure that there is enough supply in sport and leisure. Next to the sport sector, government works together with municipalities, companies, welfare organisations and non-profit organisations. The NPP was established in 2014. Sports and exercise are good for physical and mental health and social contacts. But there are still too few people who move or exercise enough. The national government wants to encourage people to exercise and exercise more.

More exercise and less sitting for good health

The Dutch Healthy Exercise Standard indicates how much a person needs to move for good health. For adults, these guidelines apply:

-  At least 150 minutes per week moderately intensive effort. For example by swimming, walking or cycling.
-  Do muscle and bone strengthening exercises at least twice a week. Older people could combine this with balance exercises.
-  Avoid sitting still.

2) Preventing injuries





The safer people play sports, the smaller the chance of sports injuries. This reduces medical costs. And athletes then report sick less often. That is why the national government encourages organisations to provide information. For example through websites like Sportzorg.nl. The ZonMw research institute carries out the sports injury prevention programme. The institute does this on behalf of the Ministry of Health, Welfare and Sport.

3) Sports medicine

Since 1 July 2014, sports doctors have been recognised as medical specialists. This is stated in the BIG Act (Individual Professions Act). As of 1 January 2016, the sports doctor has also been formally recognised as a medical specialist.

4) Sport as social policy

Sports and exercise is increasingly used as a means to achieve social objectives. The developments in the social domain strengthen this movement. Examples of social goals where exercise is used for are:

-  Health
-  Participation
-  Self-reliance
-  Local entrepreneurship







As of 2015, municipalities are responsible for providing support and services to a larger group of residents due to decentralisation in the social domain. 'One family, one plan, one director' is the starting point of the three decentralisations in the social domain. Changes in the Participation Act, the transfer of parts from the general Act on special medical expenses (AWBZ) to the Social Support Act (Wmo) and youth assistance,

demand from 2015 significant adjustments in the municipal policy. In addition, a large-scale system change is taking place: the introduction of suitable education whereby schools have a duty of care. As a result of these system changes and corresponding cutbacks, the municipal sports and exercise policy is paying more and more attention to the use of sport to achieve other social objectives. As a result, in 2016 municipal sports policy is increasingly integrating with other policy areas. Sports and exercise is increasingly used as a means to achieve social objectives.

5) Examples of Social Interventions

Unemployed

There are numerous examples of social interventions that are aimed at the unemployed. Most of them are aimed at bringing unemployed people and organisations in contact with each other. This way, unemployed people stay in touch with the working environment. Based on 6 steps, interventions are taking place:

-  Take people out of their social isolation.
-  Help them to make social contact outside their homes.
-  Participate in organised events.
-  Unpaid jobs / voluntary work
-  Paid jobs with support
-  Paid jobs without support

Social interventions target one or more goals, to help unemployed people. A couple of examples of these interventions are:

Movement to Work

This programme is designed to bring the unemployed into motion. Most of the people literally sit still, because of their unemployment. This has a negative effect on their health, their career, their social world and their finances. The goal of Movement to Work is to bring people who seek a job literally and figuratively into motion. This intervention is aimed at the first 4 stages as mentioned above. By getting people out of their social isolation to help them to participate in multiple ways, people get motivated and empowered to help themselves.

Sportnetwork(ed)

This intervention aims to use the local sport clubs and their network to bring young unemployed people in contact with organisations. The goal is use this network to create internships and jobs for young unemployed people.

Jeugdsportfonds

The Dutch Youth Sports Foundation provides opportunities to children and teenagers from low-income families to join a sports club. For those who can't afford it, the foundation pays their subscription and in some cases shoes, clothing or other materials.

Sport and Refugees

Sport and Refugees is a collaboration project between NOC*NSF (Dutch Olympic Committee), COA (Central Organ Refugees), RTP (Right to Play) and KCS (Knowledge Center Sport. This project aims to involve shelter

centres in providing sports for refugees and therefore include refugees in the Dutch society by let them participate in local sport clubs.

f) Provision of sport activities

1) Organisation of sport

A big part of sport is enabled by municipalities, because they take care of urban planning, constructing, maintaining and exploiting sport accommodations and facilities. Together Dutch municipalities spent almost 800 million euro on constructing and the maintenance of these accommodations and facilities. This sport accommodations policy can be viewed as the fundamental basis for local sport policy. This local sport policy aims at the stimulation for amateur athletes. Despite the fact that there is no legal obligation for municipalities to maintain a local sport policy, every municipality implements some sort of sport policy. During the last ten to fifteen years larger municipalities also implemented a form of sport policy aimed at professional sport and big sport events. Besides the useful spending of spare time, sport is broadly seen as a healthy way of life and economically beneficial. In response, municipalities are starting to use sport more as an instrument to a healthy lifestyle, social cohesion and save money in the process.

To describe how sport is organized in The Netherlands on a local level, we can distinguish multiple actors. First of all there are local sport clubs, who are the main executive actor in organising sport. They facilitate sport for their members and are responsible for the organised sport between clubs and individuals. Secondly we have municipalities who are the main actor in financing sport. Through funding and sport policy they can guide how sport is organised. Municipalities are usually also responsible for the maintenance and exploitation of sport facilities and accommodations. Together local sport clubs and municipalities form the organised sport in The Netherlands. In collaboration with national sport federations they are responsible for organising sport competitions and everything that comes with it. Beside the organised sport, unorganised sport exists as well. Independent contractors and freelancers are a growing group in sports. Forms of sport offered by these independent contractors and freelancers anticipate societal tendencies as individualism, more flexibility and consumerism. They offer customized sport on a flexible basis, so people can decide when and where they want to participate. The flexibility in combination with reduced rates makes unorganized sport a growing factor in national sport. Next to actor in organised and unorganised sport there are also 'other' actors in local sport. One of them is the private entrepreneur. This group is mainly responsible for the exploitation of sport facilities and accommodations. For instance, most of the swimming pools in The Netherlands are exploited by private entrepreneurs. Another group of 'other' actors in sport are rehabilitation centres. These rehabilitation centres are using sport to help people recover from physical injuries or traumas. For example, if you fall and break your wrist, you can recover in a rehabilitation centre, together with other people who have similar injuries.

2) Voluntary and non-profit sector contributions

Crucial parts of the Dutch organisation of sports are volunteers. The Dutch sport infrastructure is mainly based on voluntary contributions in clubs. The Dutch sport system is therefore a one of a kind structure, with over 1 million volunteers. This makes the sport sector the biggest voluntary sector in The Netherlands. Voluntary jobs in sport clubs are supporting jobs, like maintenance of the accommodation and bar service. Secondly there are mentoring jobs, like being trainer or coach of a sports team. A third option is administrative functions, like chairman, being on the board of a sport club or act as referee. On average, 48 volunteers are active in a single sports organisation. Because of the great dependence on volunteers of

Dutch sport organisations; they are the backbone of Dutch amateur sport. Volunteers are not getting paid. Not because they're worthless, but because they're priceless.

The culture of volunteering in sport is no different than volunteering in general, except for the fact that volunteering in sport is the biggest in The Netherlands. According to data from the Dutch National Statistic Centre (CBS), 49% of the Dutch population participated in voluntary work. From this 49%, 15% contributed voluntary in sport clubs. Between the age of 35 and 45, the most people participate in voluntary work. Almost 1 out of 5 (19%) does voluntary work in sports clubs and almost 1 out of 3 volunteers in school.

3) [Fitness](#)

The fitness branch consists of approximately 1.900 clubs and almost 2.700.000 people who participate in fitness. On average, around 75% of the fitness organisations are part of a larger company. In The Netherlands the branch association for fitness is NLActief!. This branch organisation is responsible for the recognition of fitness centres and quality insurance. It is not mandatory for organisations to be part of NLActief!, which results in the fact that anyone can start a fitness organisation. Almost every fitness centre in The Netherlands is privately owned.

4) [Outdoor](#)

In the Netherlands there is not a lot of clear and well structured information about the outdoor sub-sector. There is no detailed information regarding the outdoors in terms of simple statistics which map the size of the sector, numbers of organisations, employees, participants, etc. The VeBON (Association of Outdoor Sports Enterprises Netherlands) is the branch organisation for outdoor sports entrepreneurs. Affiliates include companies with activities in the Netherlands and the Ardennes, sporting events agencies, climbing centres, organisations with active trips and agro-recreational companies. VeBON advises and supports its members in organizing activities or in carrying out their business. In addition, the VeBON is a representative of the interests of the entrepreneurs in the outdoor sector.

g) [Total number of sport clubs](#)

Sport	Members 2016	Sport clubs 2016
Aikido	3.742	210
Shuffleboard (sjoelen)	1.233	76
American Football	1.704	21
Athletics	139.654	390
Badminton	40.989	504
Bobsledding	76	0
Martial Arts	9.034	404
Disabled Sports	13.414	205
Surfing	574	0
Judo	54.658	687
Karate-Do	8.569	193
Autosports	10.272	89

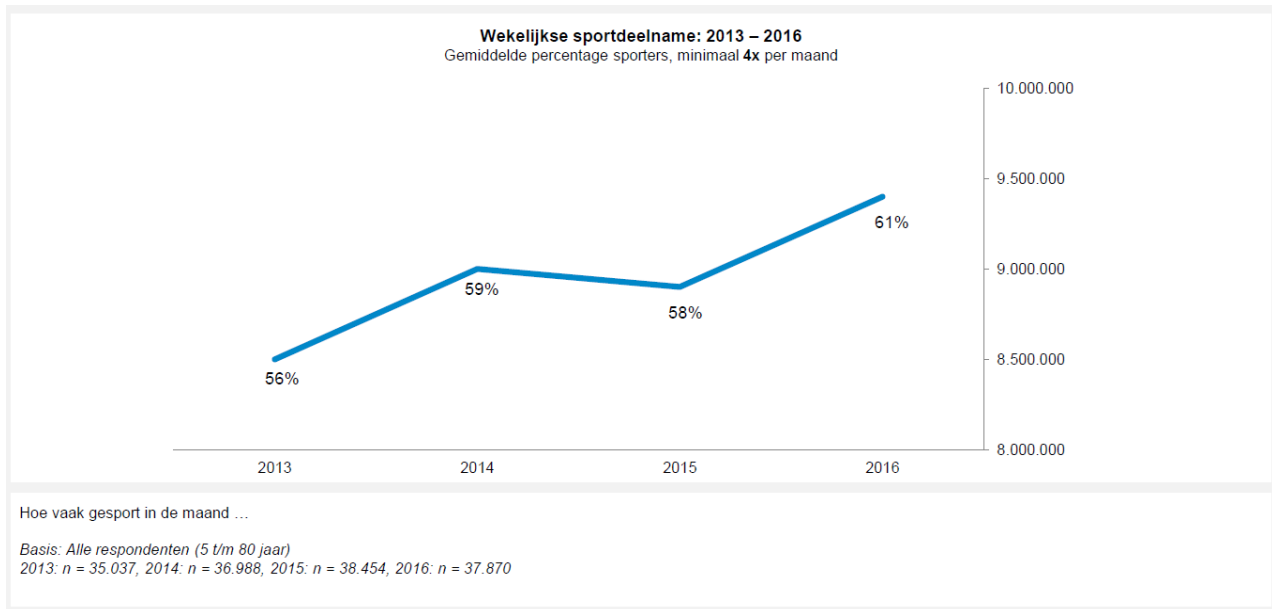
Hiking	-	-
Korfbal	85.688	511
Bowling	3.931	335
Kolf	547	28
Powerboat	361	89
Rowing	33.595	121
Ice skating	35.685	660
Cycling	35.086	214
Fencing	3.111	73
Baseball and Softball	21.059	165
Billiards	31.564	1.399
Cricket	5.690	45
Checkers	4.182	181
Golfing	385.991	281
Gymnastics	309.460	1.023
Equestrian sports	197.951	1.175
Hockey	253.351	320
Kaatsen	12.653	114
(Mountain) Climbing	30.389	1
Fitness	6.569	63
Lawn Tennis	582.918	1.682
Motorcycling	53.422	271
Chess	23.682	484
Shooting sports	38.221	668
Aviation	14.522	1
Soccer	1.231.561	3.143
Swimming	140.565	505
Walking	96.751	1.058
Lacrosse	931	13
Handball	49.378	374
Dancing	1.172	27
Basketball	19.345	345
Beugel	1.269	31
Boxing	4.605	85
Bridge	115.813	1.024

Curling	141	4
Darts	31.984	26
Dragonboat	272	9
Floorball and Unihockey	1.192	22
Frisbee	1.417	32
Go	507	12
Longbow	10.546	220
Ice Hockey	5.789	40
Indoor and Outdoor Bowls	1.014	34
Jeu de Boules	16.984	202
Klootschieten	3.323	68
Crossbow	2.726	51
Mini golf	476	28
Underwater sports	14.043	289
Roller sports and Bandy	721	19
Rugby	14.531	85
Skiing	71.019	59
Table tennis	27.742	544
Tour cycling	67.322	517
Triathlon	25.266	131
Volleyball	117.053	1.047
Waterskiing and Wakeboard	1.412	30
Rescue brigade	22.971	166
Sport fishing	562.653	818
Squash	7.061	91
Survivalrun	7.589	73
Taekwondo	6.253	146
Aquatics	69.575	385
TOTAL	5.276.778	24.546

h) Levels of participation

1) Levels of participation

The scheme below represents the weekly sport activity between 2013 and 2016



2) Most popular sports (top 10)

	2013	2014	2015	2016
1	Fitness	Fitness	Fitness	Fitness
2	Hiking	Hiking	Hiking	Hiking
3	Swimming	Swimming	Swimming	Swimming
4	Running	Running	Running	Running
5	Football	Football	Football	Football
6	Cycling	Cycling	Cycling	Cycling
7	Aerobics	Aerobics	Aerobics	Aerobics
8	Dancing	Dancing	Tennis	Tennis
9	Gymnastics	Gymnastics	Dancing	Yoga
10	Tennis	Tennis	Gymnastics	Dancing

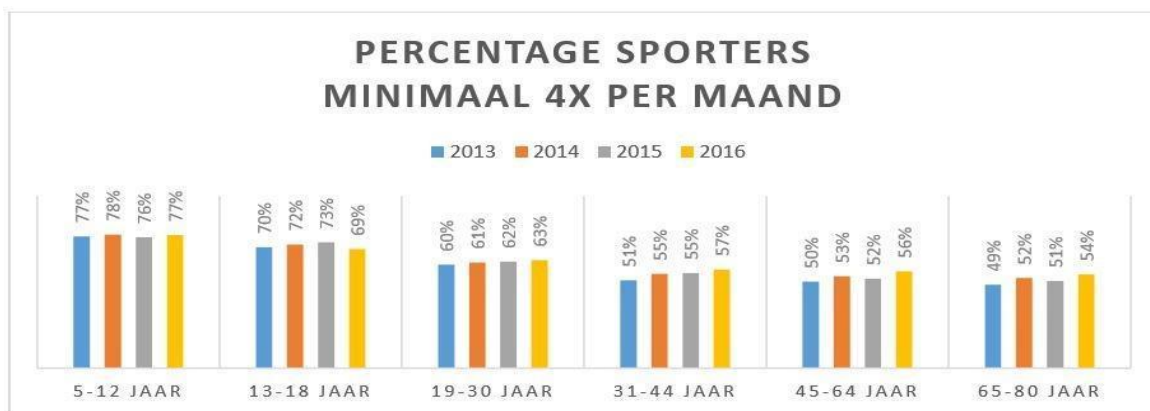
3) Individual athletes

Fitness / fitness training is the most commonly practiced individual sport in people over 12 years, followed by running, swimming and tennis. Individual sports will become popular from the age of 20 and will remain so in old age. Where younger individual athletes mainly run, people over 50 only walk, cycle and swim.

That fitness and running are popular has been visible for a long time. However, the popularity of swimming has clearly decreased over the past ten years. Men do more often running, football and various forms of cycling (touring bikes, cycling, mountain biking), while women do more in fitness / aerobics, swimming, gymnastics or yoga. Individual sports will become popular from the age of 20 and will remain so in old age. Where younger individual athletes mainly run, people over 50 only walk, cycle and swim. Higher educated people are more likely to exercise alone; lower, secondary and higher educated people are active to a comparable degree in the other sporting associations.

i) Sport participation

Weekly	By gender	
2013: 56%	M: 59%	F: 53%
2014: 59%	M: 61%	F: 57%
2015: 58%	M: 60%	F: 56%
2016: 61%	M: 62%	F: 59%



Sports participation with a minimum of 4 times per month

1) Professional sports

In The Netherlands there are no exact data regarding the numbers of professional athletes. In 2009 research was conducted among federations and the National Olympic Committee to investigate how many professional athletes exist in The Netherlands. According to this research, the number of professional athletes in The Netherlands lays around 4.600 athletes. This number is built up from different aspects. National federations were asked to provide data regarding the numbers of professional athletes who had a contract (full time or part time). These data suggested that the national sport federations had around 3.500 athletes under contract. Most federations only have professional athletes actively playing on the highest level of competition. The exception is the Dutch National Football Association (KNVB), in which professional athletes also play on lower levels but also have contracts. No exact data was provide or is known about the

numbers of football players who have a contract on lower levels, so the research group estimated that around 900 athletes in football are bound by contract. This number is based on the number of players (11) in the amount of clubs (84) actively playing on the highest levels of professional and amateur football. Because this research does not possess exact data but only makes assumption, the exact number of professional athletes in The Netherlands lays higher than the estimated 4.600.

In 2009 there was published a report called “Een wereld te winnen, Professionalisering van de arbeidsverhoudingen van beroepsporters”. In the report a professional athlete is an athlete for whom sports practice is a profession. They can (party) live because of the profession. In 2009 the upper limit of professional athletes is 3.900 and the lower limit 3.400 (except amateur football). Including amateur football the upper limit is 4.800 and the lower limit is 4.300.

j) Venues / facilities

1) General information

During the last two decades sport and physical activity facilities have been developing the Dutch sporting landscape into more commercial initiatives (fitness centres) and the usage of public areas for sport (boot camps, mountain bike routes). On average, The Netherlands has one sport facility per 835 residents, and has at least one facility between 800 meters and 1.6 kilometres from their homes. Sport and physical activity mainly takes place in multiple areas: gyms, football accommodations, tennis facilities, fitness accommodations and so called special accommodations.

2) Gyms

In December 2015, The Dutch Data Files Sport registered 6.300 gyms. A gym is a multifunctional facility in which multiple sports can be practised. These facilities can be found inside school or as an individual indoor facility. Not all the gyms are registered in this data file, because some gyms are located inside school buildings and are publicly accessible. These gyms are multi functional and can be used for facilitating almost any indoor sport or activity.

3) Football accommodations

The Dutch Data Files registered 2.315 football accommodations, combining 7.526 separated fields. Around 20% of the football fields are artificial. These accommodations are used not only for football purposes, but are multi functional. For example, these accommodations are frequently used to provide physical education lessons.

4) Tennis accommodations

In The Netherlands there are 2.067 tennis accommodations, divided between an estimated 1.700 clubs who are registered at the Dutch Tennis Federation. 1.671 of those tennis accommodations are suitable for playing outdoors, combining around 10.458 individual playing fields. Around 20% of the tennis fields are artificial, whereas 40% of the tennis fields still are made up from gravel.

5) Fitness accommodations

The fitness sector in The Netherlands is a special sector. Fitness is upcoming and a lot of private and individual organisations provide fitness facilities. Not all of these centres are registered, which make it hard

to make an assumption on the numbers of fitness organisations. The Dutch branch organisation for fitness (NLActief!) tries to register as much organisations as possible. According to their data, there are around 1.000 organisations providing fitness facilities and they facilitate around 2.5 million people.

6) Special accommodations

Special accommodations consists three types of accommodations: watch accommodations, regional accommodations and temporary accommodations.

Watch accommodations are facilities where facilities which can provide for international games, like the 37 football stadiums, Thialf ice skating stadium and the Pieter van den Hoogenband swimming stadium. These accommodations are classified as A1 accommodations.

Regional accommodations are facilities specialized in facilitating of local sports. Great examples of regional accommodations are facilities for the Dutch sport of kaatsen, which is popular in the province of Friesland. In the province there are dozens of facilities for this sport, meanwhile there are only 8 accommodations outside of the region.

Temporary accommodations can differ in form and size. Public space can be turned into temporary accommodations for marathons, sailing games or other events. Also existing venues can be transformed into temporary accommodations for sport. For example, every winter the Dutch Olympic Stadium in Amsterdam transforms the running track into an ice rink.

Sport accommodations and facilities, usage per type of accommodation								
Subject 1	Subject 2	Subject 3	Years	2003	2006	2009	2012	
Swimming pools	Total of swimming pools		Numbers	770	725	720	700	
	Type of pool	Indoor swimming pools	Numbers	340	340	340	340	
		Outdoor swimming pools	Numbers	250	225	225	220	
		Hybrid swimming pools	Numbers	150	130	125	120	
		Beach and Natural swimming pools	Numbers	30	30	30	25	
	Operator	Municipalities	%	36	37	32	32	
		Private	%	64	63	68	68	
	Swimming pools with recreational facilities	Total of swimming pools		%	93	92	93	92
		Indoor swimming pools		%	89	85	87	86
		Outdoor swimming pools		%	96	99	98	99
		Hybrid swimming pools		%	98	98	100	100
	Indoor accommodations	Total Indoor accommodations		Numbers	2160	2135	2275	2255
Type of accommodation		Gym (1 unit)	Numbers	440	480	500	510	
		Gym (3 units)	Numbers	920	935	1005	1005	
		Tennis accommodations	Numbers	270	235	230	195	
		Remaining indoor accommodations	Numbers	540	480	535	545	
Operator		Municipalities	%	46	47	45	45	
		Private	%	54	53	55	55	
Gyms		1 unit accommodations		Numbers	655	770	795	715
		3 unit accommodations		Numbers	975	1010	1090	1100
		Ice skating accommodations		Numbers	20	25	25	20
		Fitness gyms		Numbers	315	385	495	465

Indoor accommodations	Sport specific accommodations	Total fields & facilities	Numbers	7325	6830	6520	6150
		Tennis fields	Numbers	1530	1480	1345	1010
		Squash fields	Numbers	1245	1115	1055	940
		Bowling alleys	Numbers	1130	1155	1165	1065
		Table tennis facilities	Numbers	385	305	285	245
		Billiard facilities	Numbers	1775	1520	1265	1245
	Sport specific accommodations	Remaining facilities	Numbers	1260	1255	1415	1650
Outdoor Accommodations	Total outdoor accommodations		Numbers	4000	3730	3750	3750
	Accommodation	Football	Numbers	1250	1130	1130	1120
		Tennis	Numbers	540	480	480	450
		One kind of other sports	Numbers	410	330	330	320
		Combination of field sports	Numbers	800	800	770	780
		Field sports and remaining sports	Numbers	420	410	440	450
		Remaining sports	Numbers	590	570	600	630
	Operator	Municipalities	%	78	79	75	71
		Private	%	22	21	25	29
	Match venues	Total match venues	Numbers	20410	20710	21240	21270
		Football fields	Numbers	7150	6980	7040	7050

		Tennis fields	Numbers	5950	5580	5590	5320
		Hockey fields	Numbers	780	820	850	840
		Korfbal fields	Numbers	920	850	820	800
		Handball fields	Numbers	490	440	410	370
		Remaining fields sport fields	Numbers	910	970	990	1040
		Remaining sport fields	Numbers	4200	5070	5540	5860

k) Trends and tendencies

1) Major changes and tendencies

Internationally The Netherlands are leading in successfully and efficiently organising sport. To maintain this position, The Netherlands must keep innovating and developing their sports system. The value of sport still stands strong, but the overall sport sector is under pressure. Several important changes and tendencies in recent years are:

Societal transition

Our society is undergoing transition, as a result of tendencies as exponential growth of increasing digitalisation for example. Institutions are no longer leading in our sport system, but consumer needs are. Organisations are challenged to comply into this transition from traditional sport institutions to innovating and developing entities.

Changing competences

The transition as mentioned above demands that people who are working in sport keep developing their skills and knowledge. To be able to work in the sport sector, new competences as leadership, entrepreneurship and personal development are required.

Threats

There are numerous threats that are dangerous for the world of sport. Known, but also upcoming threats as match fixing, corruption, doping, a lack of transparency and unsafe situations are threats that require a strong and effective approach. Sport is valuable and fun, but measures are needed to maintain those values and fun.

Efficiency in resources

A small country as The Netherlands doesn't have the same resources that many big countries have. Therefore The Netherland must effectively distribute its resources. Many activities and resources are still divided between the National Olympic Committee and 74 national sport federations. To maximally utilise these scarce resources, cooperation between everyone is necessary.

2) Changes in the near future

In general, the next bullets indicate some changes:

1. By 2025, 60 percent of all Dutch municipalities are faced with a shrinking population. The population is aging, young people are moving to the big city and wealthy families are moving to more attractive residential areas with more amenities. This not only affects the sports clubs. They have to deal with declining membership numbers and lack of volunteers. But also on the sports policy of municipalities. Because how do you keep accommodations affordable?
2. The developments in the social domain have repercussions on the sports sector. For example, sport and exercise are often used as a means to achieve social objectives. Associations also experience this

movement. 80 percent of sports directors now believe that sport must play an important role in society.

3. There are more and more individual athletes. Fitness is the most popular sport in adults (22%), followed by running (12%), tennis (5%) and swimming (5%). This has all kinds of consequences for the sport. It has consequences for the way in which sport is organised. It leads to more frequent use of the public space for sports. But the number of sports injuries is also increasing, which may be partly explained by the increasing number of individual athletes.
4. The influence of social media and technology is noticeable in the sport. For example, when it comes to sports experience around events, but also because there is increased attention for the monitoring of own results through runkeeper, fitbit etc.

3) Main challenges facing employers and operators

Changing competences

The transition as mentioned above demands that people who are working in sport keep developing their skills and knowledge. To be able to work in the sport sector, new competences as leadership, entrepreneurship and personal development are required. In the near future this development might become a problem for employers and operators. This development creates a mismatch between demand and supply.

Generating income

Because of the decreasing funding through the National Olympic Committee, employers and operators are faced with declining income. Due to this development, employers and operators must search for new ways of funding, or collaborate with other organisations to maximize their efficiency in resources.

Societal transition

Our society is undergoing transition, as a result of tendencies as exponential growth of increasing digitalization for example. Institutions are no longer leading in our sport system, but consumer needs are. Organisations are challenged to comply into this transition from traditional sport institutions to innovating and developing entities.

Inadequate job supply

In general, the biggest mismatch between employers and employees is the inadequate job supply. Employers provide part time jobs, whereas employees like to work full time. This mismatch creates the tendency that employees avoid working in the sector of sport, or combine a part time job in sport with another outside of sports.



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Improving the Supply of Skills to the Sector

4

SPORT LABOUR MARKET STATISTICS



4. SPORT LABOUR MARKET STATISTICS

a) Methodology and data collection

For the data collection of the sport labour market statistics different sources were used. In the Netherlands there are many different ways in which statistics are collected. Sport federations have their own databases for their specific sport and the national statistics office has their database consisting of different data. Secondly there are different research institutions (Mulier instituut, Kenniscentrum Sport) that gather different kinds of data in a broader range than federations do. Thirdly, there are many different reports written by different actors in the Dutch sporting society, like Rapportage Sport, Abeidsmarktmonitor Sport and a sport coalition agreement. Then there are the statistics gathered and provided by Eurostat. Because a lot of research that is being done throughout different methods and standards, the numbers and statistics differ in each research or report. Therefore in this National Report, the choice was made to use the Eurostat statistics. Our motivation for this choice was based on the comparison that will be made with other European countries and the reliability of the scientific numbers in relation to the different kind of methods and standards used in other research.

A second motivation to use the Eurostat records was based on the trouble gathering data through the national statistics office. To access this data, the organisation has to pay a certain amount of money. This amount was not acceptable in relation to the goal of the data. Since the Eurostat records also use the statistics of the national statistics office of The Netherlands, the Eurostat records are more comprehensive than other research useful for this report.

All registered organisations across Europe are classified under a NACE codes. The goal of the desk research was to interrogate these codes to identify organisations whose main business is the provision of sport. 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 basically four-digit classification¹ providing the framework for collecting and presenting a large range of reliable and comparable statistical data according to economic activity in the fields of economic statistics (e.g. production, employment and national accounts) and in other statistical domains developed within the European statistical system (ESS). In terms of NACE codes for which data were targeted through the research, the goal was to ask for all available data with a 4-digit breakdown as follows:

NACE 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

93.14 Other sport activities

The codes under 93, define the organisations whose main business is classified as sport. Then the data regarding sport occupations exist under NACE 93.1 codes, but also within other organisations classified under other NACE codes. Efforts are put into collect data on people having a sport specific occupation but also employed in organisations with a broader role than just sport *e.g. local authorities, hotels, residential activity centres, universities and schools*. This was achieved through the cross-matching of ISCO-08

(occupational codes) with additional NACE codes (not just NACE code 93). The International Standard Classification of Occupations (ISCO-08) was adopted through a resolution of a Tripartite Meeting of Experts on Labour Statistics held in December 2007. This resolution was subsequently endorsed by the Governing Body of the ILO (International Labour Organization) in March 2008. The ISCO-08 divides jobs into 10 major groups:

1 - Managers

2 - Professionals

3 - Technicians and associate professionals

34 Legal, Social, Cultural and Related Associate professionals (main heading)

342 Sport and Fitness Workers (3 digits)

3421 - Athletes and Sports Players (4 digits)

3422 - Sports Coaches, Instructors and Officials

3423 - Fitness and Recreation Instructors and Programme Leaders

4 - Clerical support workers

5 - Service and sales workers

6 - Skilled agricultural, forestry and fishery workers

7 - Craft and related trades workers

8 - Plant and machine operators, and assemblers

9 - Elementary occupations

10 - Armed forces occupations

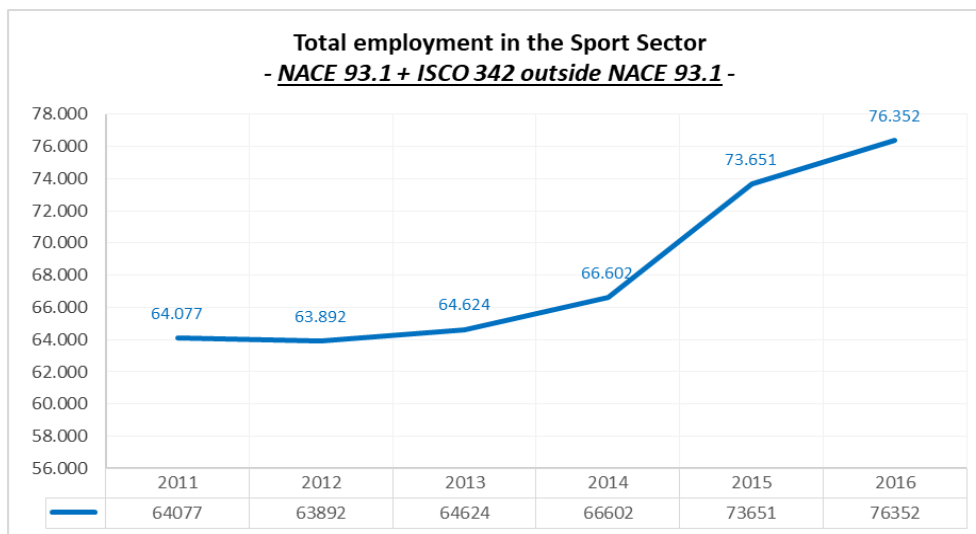
Each major group is further organised into sub-major, minor and unit groups. The basic criteria used to define the system are the skill level and specialisation required to competently perform the tasks and duties of the occupations. In the context of the ESSA-Sport project, the research involved the collation and summary analysis of existing researches in which data has been collected from primary research and this report provides a summary of the main findings and statistics for the sector per country.

b) Total Dutch employment in sport

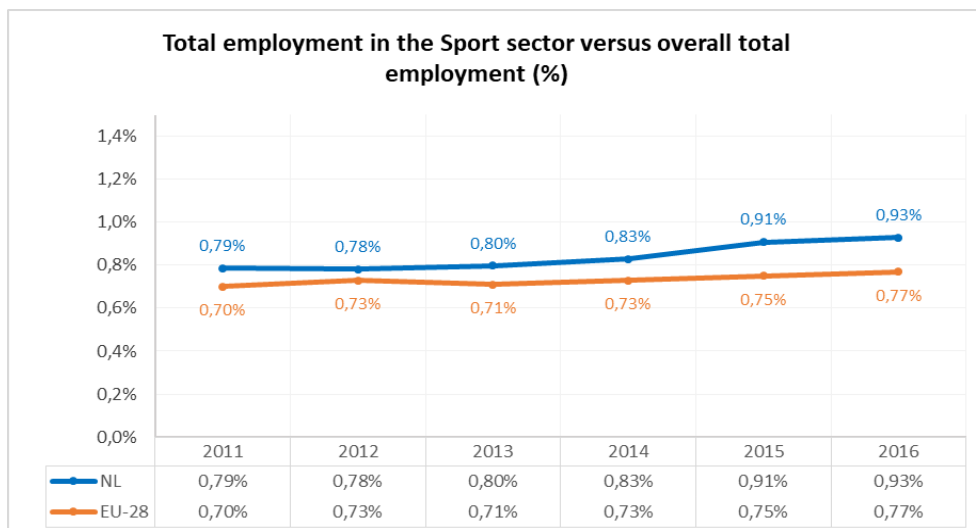
The figures below correspond to the total number of people having a sport occupation (ISCO 342) within the sport sector (NACE 93.1) and those having a sport occupation outside the sport sector (Other NACE codes). We have been able to cross-tabulate NACE versus ISCO and this was the only condition to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

The total employment in the sport sector in the Netherlands according to this statistical definition of the ESSA-Sport project is 76,352.

The first graph shows the total employment in the sport sector. Since 2012, the numbers of jobs have been increasing every year, growing nearly 20 per cent between 2012 and 2016.

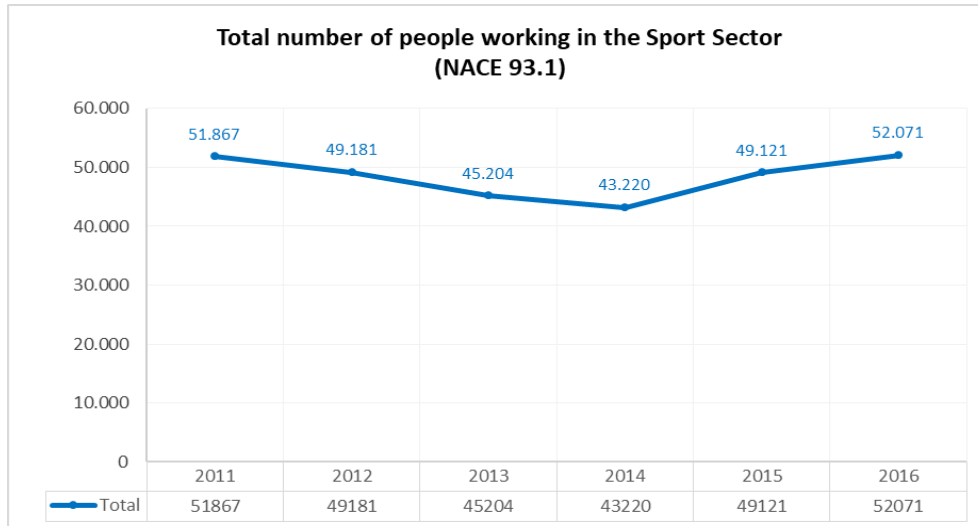


The second graph shows the percentage of employment in sport in comparison to the overall employment. As the graph shows, The Netherlands has a higher percentage of employment than the average of Europe as a whole.



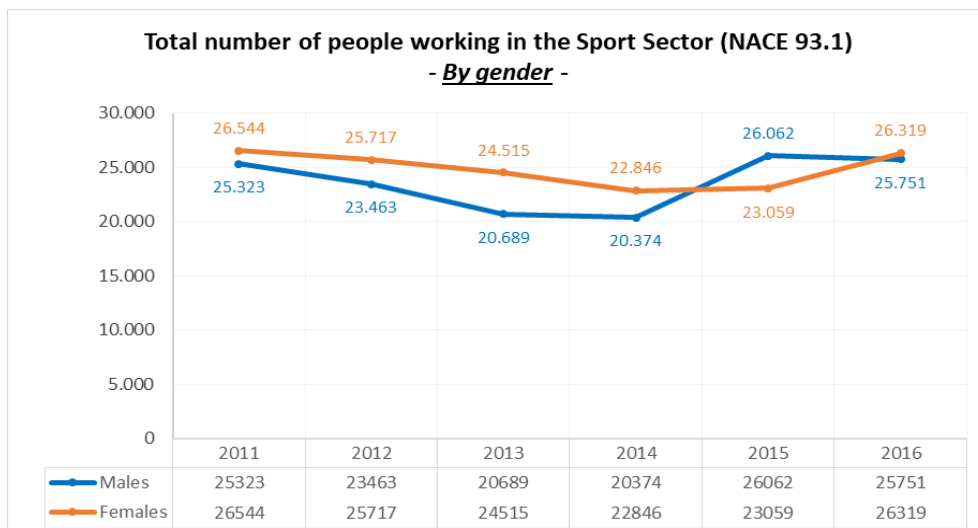
c) Total number of people working in the sport sector

This graph shows the number of people working in the sport sector in The Netherlands. These numbers could consist of the different forms of occupations, such as the operations of sport facilities, activities of sport clubs, operating fitness facilities and other sport activities. This can also include people with a sport related occupation but whom are not working in the sport sector (for example, working in hotels) or people with a non-sport job but who are working in sport organisations (such as administrative occupations).



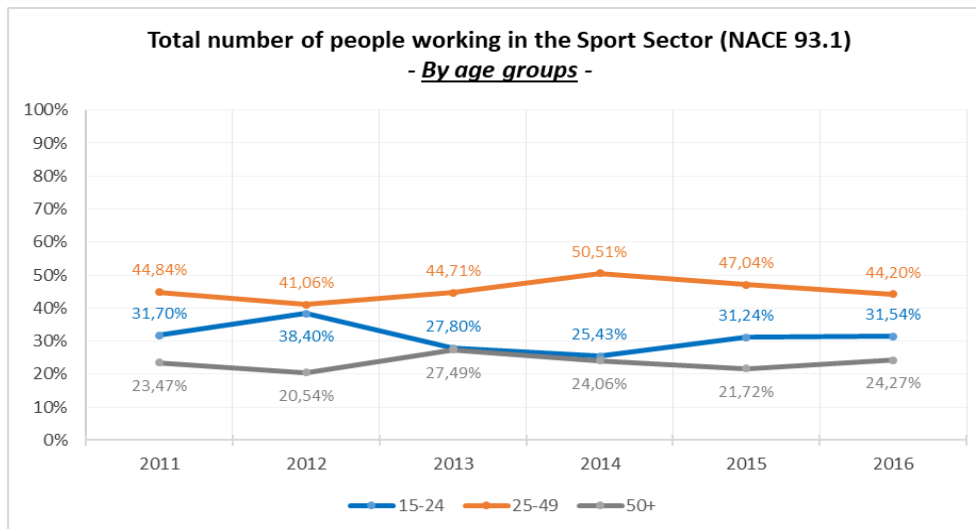
1) Total number of people working in the sport sector by gender

The following graph shows the total number of people working in the sport sector, presented by gender. Similar to the graphs shown above, the number of people working in sport could consist out of different forms of occupations. An interesting development throughout the years in The Netherlands is gender parity. The numbers of males and females working in the Dutch sport sector are equal.



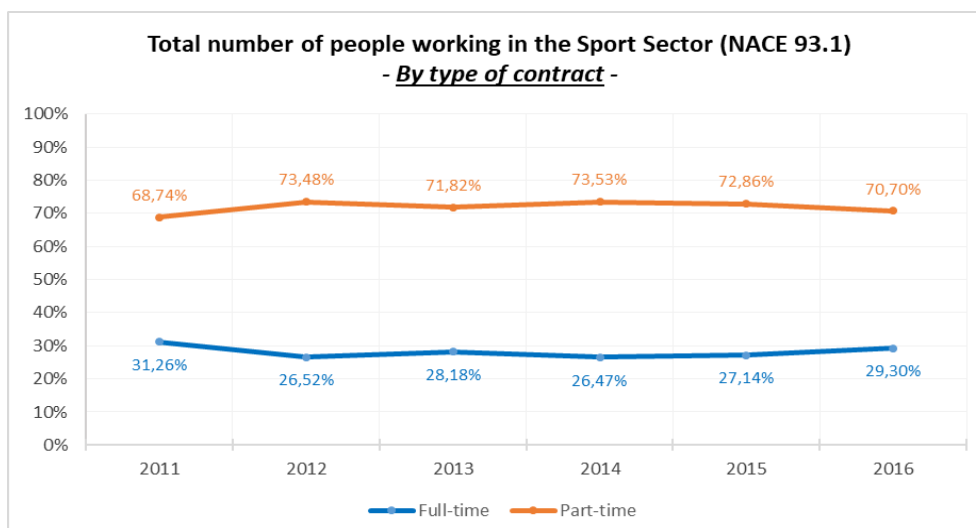
2) Total number of people working in the sport sector by age groups

The following graph shows the total number of people working in the sport sector, presented by age group. Similar to the graphs shown above, the number of people working in sport could consist out of different forms of occupations. An interesting development in this area is that in Dutch sports a relatively high percentage of young professionals are active in the sector. Throughout the years, between 75 and 80 percent of people working in sports are not over 50 years old.



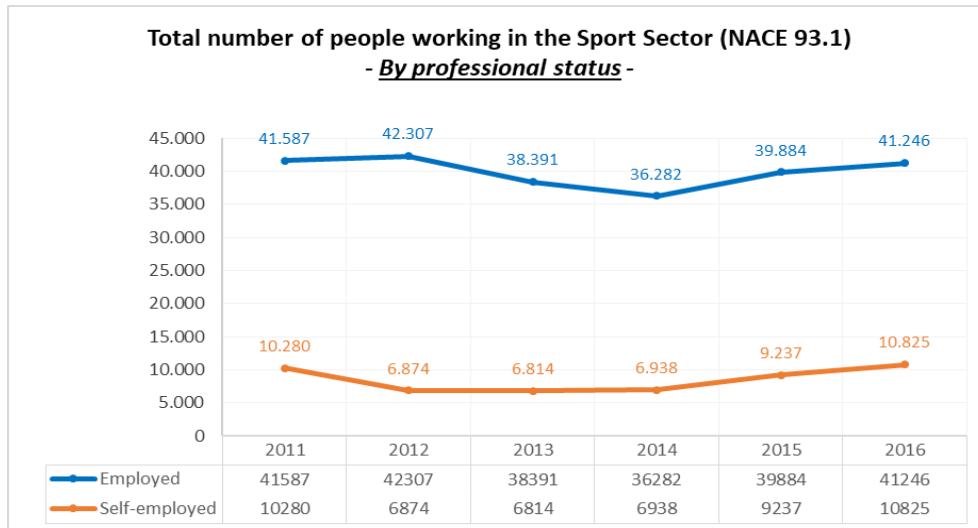
3) Total number of people working in sport by type of contract

The following graph shows the total number of people working in the sport sector, presented by their type of contract. In the previous chapter, one of the main challenges was presented as inadequate job supply. Employers offer part time jobs, whereas employees desire a full time contract. This graph underlines this discrepancy in job supply, with over 70 percent of the contract in the Dutch sport sector are based on part time jobs.



4) Total number of people working in sport by professional status

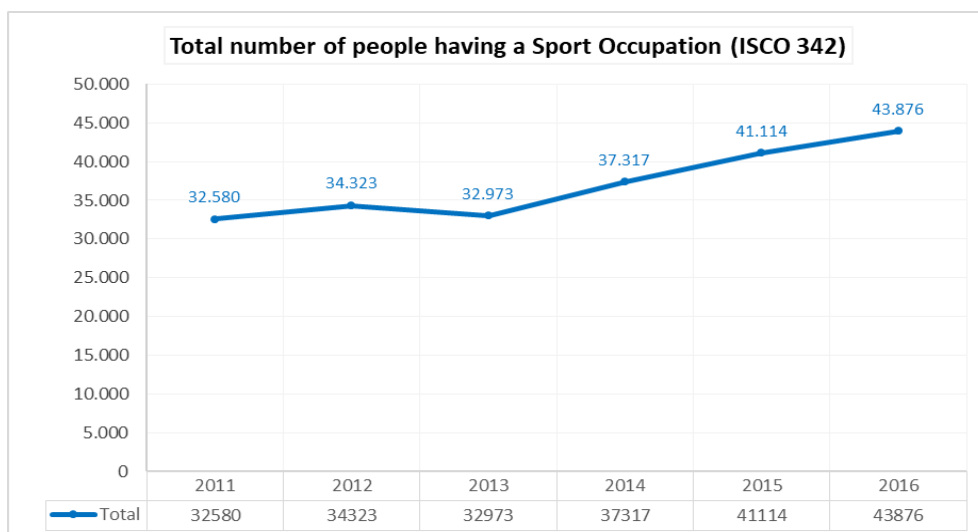
The following graph shows the total number of people working in the sport sector, presented by their professional status. Most of the people working in the Dutch sport sector are employed by sport organisations. A growing number of people are self-employed. Part of these growing numbers can be explained by the growing numbers of athletes being employed by sport federations.



d) Total number of people having a sport occupation

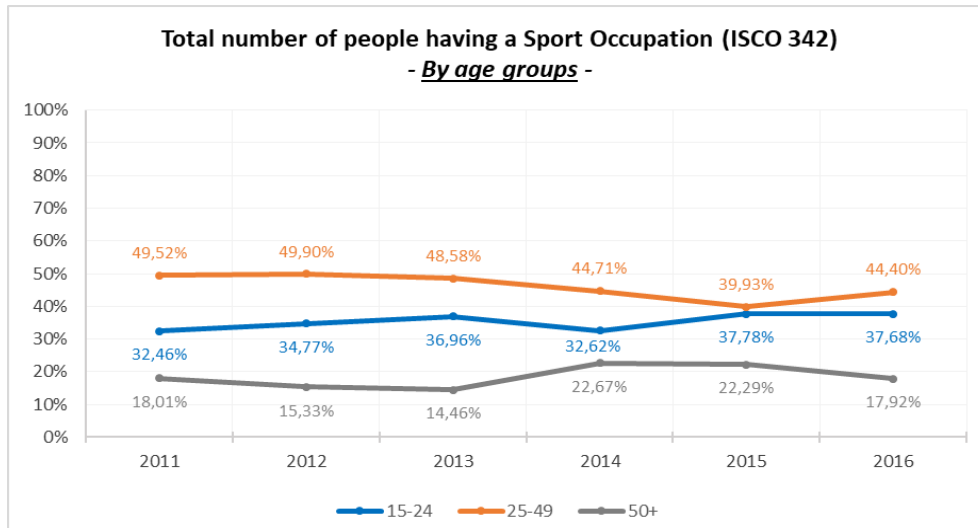
The following graphs present several forms of records based on ISCO codes. These are different from the graphs shown above, since the next graphs present data of people with a sport occupation which can be outside of the sport sector. Examples of these occupations can be working in sport related occupations in local municipalities, hotels, schools and universities.

This graph shows the number of people working in a sport occupation. Similar to the increase in numbers of people working in the sport sector, the number of people working in a sport occupation has been increasing since 2013. Therefore we can say that throughout the past years, sport has been growing in The Netherlands.



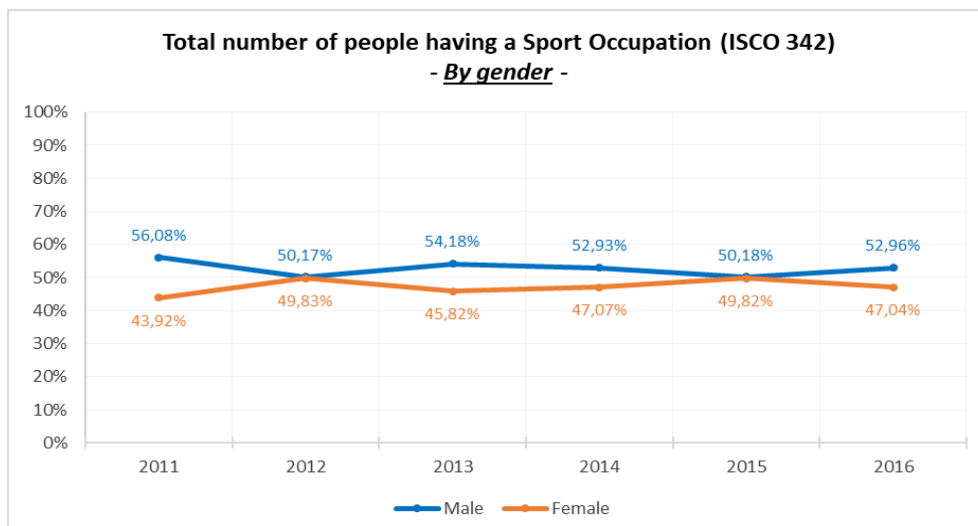
1) Total number of people working in a sport occupation by age

The following graph shows the total number of people working in the sport sector, presented by age group. Similar to the numbers of people working in the sport sector, relatively many young people are working in sport occupations. With around 80 percent of the people working in sport occupations is not over 50 years old.



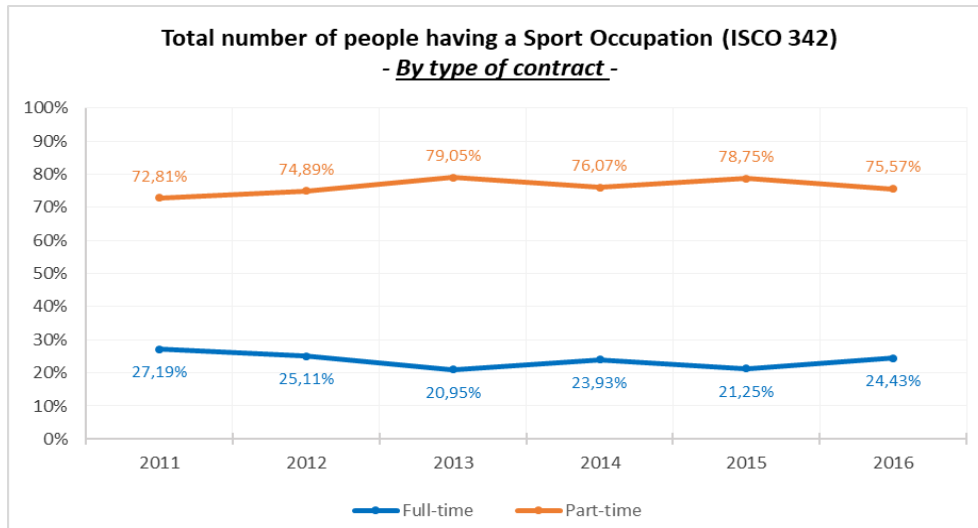
2) Total number of people working in sport occupations by gender

The following graph shows the total number of people working in sport occupations, presented by gender. With people working in sport occupations there is a slight disparity between males and females working in these occupations. This is somewhat different in relation to people working the sport sector, since the numbers of males and females are equal.



3) Total number of people working in sport occupations by contract

The following graph shows the total number of people working in sport occupations, presented by type of contract. With regard to the type of contract of people working in the sport sector, people working in sport occupations too are mostly active on a part time contract. In both occupations and sector, between 75 and 80 percent of the employees are working on a part time basis.

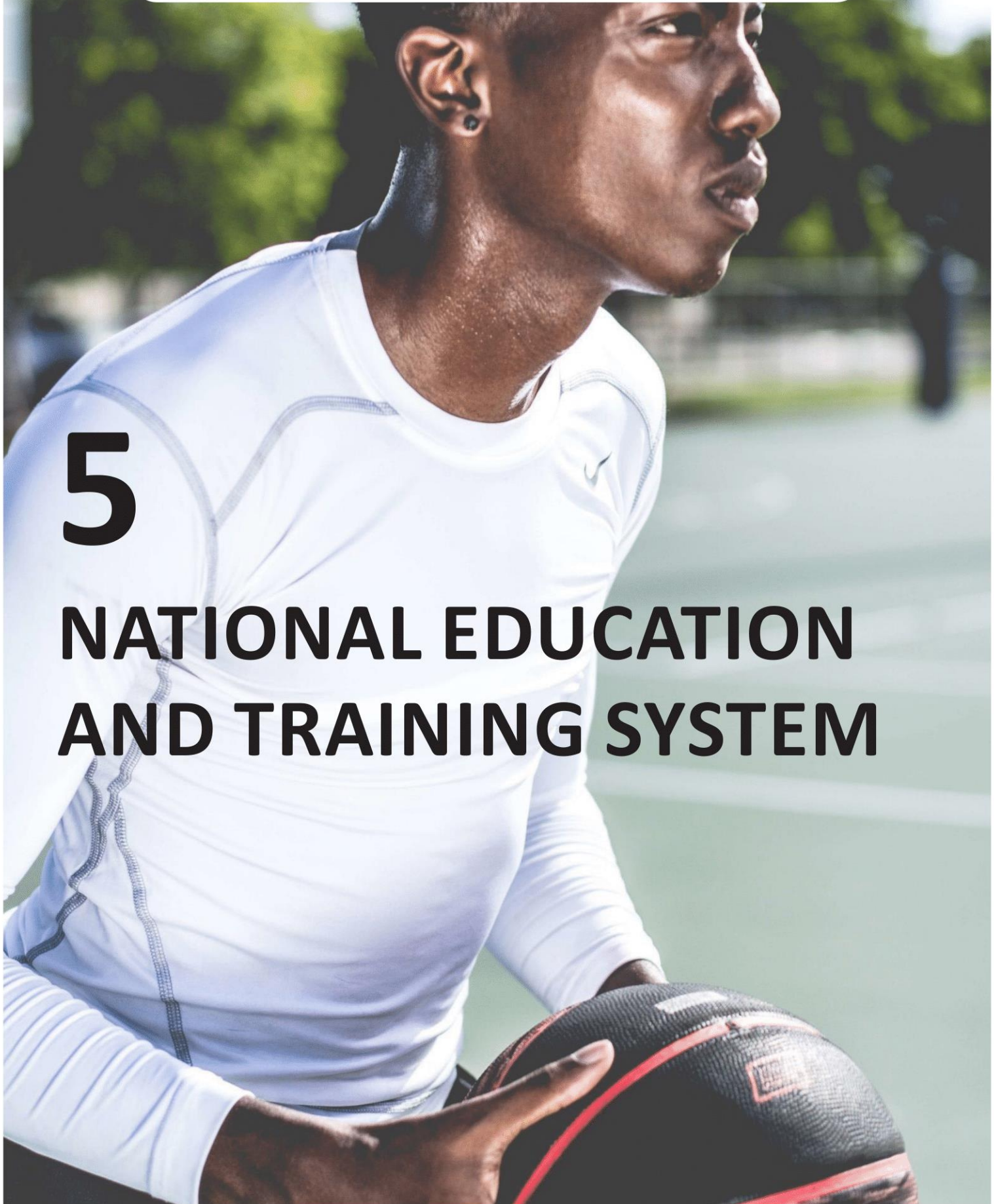




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5

**NATIONAL EDUCATION
AND TRAINING SYSTEM**







5. NATIONAL EDUCATION AND TRAINING SYSTEM

a) Responsible ministry

The responsible ministry of the Dutch educational system is the ministry of Education, Culture and Science. The Ministry of Education, Culture and Science works to create a smart, skilled and creative environment in the Netherlands. Its mission is to ensure that everyone gets a good education and is prepared for responsibility and independence. The Ministry also wants people to enjoy the arts, and aims to create the right conditions for teachers, artists and researchers to do their work. Their mission is to ensure a knowledgeable, skilled and cultured country.




The Ministry has the following objectives:

-  To ensure that everyone gets a good education;
-  To ensure that everyone is prepared for personal independence and responsibility;
-  To ensure that everyone has the opportunity to experience and enjoy culture;
-  To ensure that teachers, artists and scientists are able to carry out their work.




b) School system

The Dutch educational system requires full-day attendance from children when they start at elementary school until they reach the age of 18 or when they have obtained a basis qualification. A basis qualification allows young people to enter the labour market and requires a degree from higher general secondary education (HAVO), pre-university education (VWO) or MBO level 2.

In general, the Dutch school system is based on a public school system, fully or partially funded by the government. The first part of education is the same for all children based on their age. Until the age of 4 children are not required to enrol in education. Parents can choose to keep their children at home or to enrol them in kindergarten. Most children start elementary school around the age of 4, depending on their intellectual and general development. Most children finish their elementary school around the age of 12, after this they advance to secondary education. Based on the intellectual development there are 3 different roads in secondary education:




-  VMBO or pre-vocational secondary education (4 years)
-  HAVO or higher general secondary education (5 years)
-  VWO or pre-university education (6 years)

Secondary education is separated into two parts: lower years and upper years or so called first and second phase. Lower years or first phase consists of:

-  VMBO, first and second year.
-  HAVO, first, second and third year.
-  VWO, first, second and third year.





In this first phase the curriculum is mostly determined by attainment targets divided in 7 domains: Dutch, English, numeracy and mathematics, people and nature, people and society, art and culture and movement and sport.

The upper years or second phase consist of:





-  VMBO, third and fourth year.
-  HAVO, fourth and fifth year.
-  VWO, fourth, fifth and sixth year.

In the second phase the educational curriculum is determined by so called examination programs. These programs are customized into 4 different field of interest.




In VMBO these fields are:

-  Health and Welfare
-  Engineering
-  Economy
-  Green sector

In HAVO & VWO the different fields are:

-  Natural Sciences and Technology; advanced mathematics, natural sciences and chemistry.
-  Natural Sciences and Health; biology, physics/geography, advanced mathematics / mathematics and chemistry.
-  Economy and Society; economics, advanced mathematics / mathematics, history and geography.
-  Culture and Society; a modern foreign language, culture and arts, history, mathematics and economics.





When pupils have finished secondary education they can progress to higher education. Based on their previous education pupils can progress to the following higher education options:

-  VMBO => MBO (vocational education)
-  HAVO => HBO (Higher education)
-  VWO => WO (Higher education)

Besides the mainstream education the Dutch school system contains 2 others forms of education: special education and adult education.

1) Special education

Children who are unable to follow regular primary education are can enrol in special education. In principle, the curriculum in special education is the same as in mainstream education, but the classes are smaller and there are experts assisting children in their development. After elementary special education pupils usually advance to special secondary education. This system is divided in 4 specific clusters, depending on the disability:

-  Cluster 1: Visual disabled (Former schools for the blind and partially sighted)
-  Cluster 2: Hearing impediments or communicational disabilities (former schools for deaf or hearing impaired pupils and pupils with severe speech disorders).
-  Cluster 3: Physical, intellectual or multiple disabilities and chronicle ill pupils.
-  Cluster 4: Behavioural disorders, maladjusted children, psychiatric ill and pupils in pedagogical institutes.

2) Adult education

The adult education in The Netherlands is divided in 2 different levels: basic education and general secondary education for adults.

3) Basic education

Basic education focuses on the acquisition of basic skills to equip people to:

- Participate in society;
- Enrol in a training course in preparation for entering the labour market;
- Basic education focuses mainly on the writing and reading of native language (Dutch) and other skills necessary for participating in society like numeracy, computer skills and knowledge of the Dutch society.

Participants must be aged over 18 years. Education programs may be linked to vocational education. On successful completion of a program, participants receive a school certificate.

4) General secondary education (VAVO)

The programs in VAVO correspond to initial general secondary education (VMBO-tl, HAVO and VWO). General secondary education for adults is different from HAVO and VWO in that a participant may combine subjects studied individually over time to receive a diploma, but there are no subject certificates issued in initial education.

c) Higher education

The Dutch higher education is provided by universities (WO) and universities of applied sciences (HBO). Universities include: general universities, universities specializing in engineering and agriculture and the Dutch Open University. Universities primarily provide academically-oriented programs. Universities of applied sciences include comprehensive and specialized universities in field as agriculture, arts and teacher education, but those are more professionally oriented. Higher education comprises three phases: Bachelor degree (first phase), Master’s degree (second phase) and Doctorate (third phase). The following diagram shows this schematically along with the duration of the cycles and the number of ECTS points to be obtained.

Diagram 1. Three phases of Higher Education in the Dutch School System.

Admission from	First cycle	Second cycle	Third cycle
mbo/havo/vwo	<div style="border: 1px solid black; padding: 5px; width: fit-content;">Associate degree 120 ECTS</div> <div style="border: 1px solid black; padding: 5px; width: fit-content; margin-left: 100px;">Bachelor 240 ECTS professionally oriented</div>	<div style="border: 1px solid black; padding: 5px; width: fit-content; margin-left: 100px;">Master (60-120 ECTS)</div>	<div style="border: 1px solid black; padding: 5px; width: fit-content; margin-left: 100px;">Doctorate (4 years)</div> <div style="border: 1px solid black; padding: 5px; width: fit-content; margin-left: 100px; margin-top: 20px;">Design engineer (2 years)</div>
vwo	<div style="border: 1px solid black; padding: 5px; width: fit-content; margin-left: 100px;">Bachelor 180 ECTS academically oriented</div>	<div style="border: 1px solid black; padding: 5px; width: fit-content; margin-left: 100px;">Master (180-240 ECTS)</div>	<div style="border: 1px solid black; padding: 5px; width: fit-content; margin-left: 100px; margin-top: 20px;">Medical specialist (3-6 years)</div>

1) First cycle

Students who want to access a professionally-oriented Bachelor program or to an Associate degree program need to possess a VET, HAVO or VWO diploma. Entry to an academically oriented Bachelor program normally requires a VWO diploma.

2) Second cycle

The Bachelor degree gives access to Master programs and Master degrees. The Master program takes 1–2 years.

3) Third cycle

Education of the third cycle is only offered by universities. The most important requirement for a third cycle degree is the completion of a thesis based on original research and defended in public. All universities can provide the PhD. Besides the PhD the three universities for engineering offer a (technical) design program for which, after the Master program, more knowledge should be acquired and personal assignments in a number of engineering fields should be completed. The technical design programs require two years study and graduates receive the degree Professional Doctorate in Engineering (PD Eng). The training of medical specialists is the responsibility of the competent authority in a university hospital.

Universities and Universities of applied sciences can be public or private. Based on the legal form of the institute the cost of education differs. Public universities require tuition fee as set by the government. Private universities are free to determine their own tuition fee, but are legally bound to ask a minimum that matches the tuition fee set by the government. The legal tuition fee for higher education for 2017-2018 is set on the amount of €2.006,-.

d) Dutch Universities of applied sciences

ABC Hogeschool	Hogeschool Leiden	NHA
Academie Artemis, Hogeschool voor Styling	Hogeschool NCOI	NHL Hogeschool
Academie voor Wetgeving	Hogeschool NIFA	NHTV internationaal hoger onderwijs Breda
Aeres Hogeschool	Hogeschool Notenboom	NTI
Amsterdam School of Real Estate	Hogeschool NOVI	Nyenrode New Business School
Amsterdamse Hogeschool voor de Kunsten	Hogeschool PBNA	Opleidingsinstelling Geestelijke Gezondheidszorg Verpleegkunde
ArtEZ hogeschool voor de kunsten	Hogeschool Rotterdam	Oysterwyck Hogeschool
Avans Hogeschool	Hogeschool Schoevers	Philipse Business School
Avans+	Hogeschool SDO	Register Belastingadviseurs
Business School Nederland	Hogeschool Tio	Saxion
Capabel Hogeschool	Hogeschool Utrecht	Saxion Next
Centrum voor Humanistische Vorming, A&A	Hogeschool van Amsterdam	Schouten & Nelissen University
Christelijke Hogeschool Ede	Hogeschool van Arnhem en Nijmegen	SOD Next
Codarts Hogeschool voor de Kunsten	Hogeschool voor Pedagogisch en Sociaal-Agogisch Onderwijs Groningen	SOMT

Cursus Godsdienst Onderwijs	Hogeschool West-Nederland voor Vertaler en Tolk	Stenden Hogeschool
De Haagse Hogeschool	Hotelschool The Hague	Stenden Masters
Design Academy Eindhoven	HZ University of Applied Sciences	Team Academy
Driestar Hogeschool	Instituut Defensie Leergangen	THIM Hogeschool voor Fysiotherapie
EuroCollege University of Applied Sciences	Inter College Business School	The New School for Information Services
European Institute For Brand Management	Iselinge Hogeschool	Thomas More Hogeschool
Fontys Hogescholen	Islamitische Universiteit Europa	TMO Fashion Business School
Fotovakschool	Islamitische Universiteit Rotterdam	Tyndale Theological Seminary
Gerrit Rietveld Academie	ITV Hogeschool voor Tolken en Vertalen	Van Hall Larenstein
Hanzehogeschool Groningen	IVA Driebergen Business School	Viaa
HAS Hogeschool	Katholieke Pabo Zwolle	Wagner Group
HBO Da Vinci Drechtsteden	Koninklijk Actuarieel Genootschap & Actuarieel Instituut	Webster University
HKU	LOI Hogeschool	Windesheim
Hogeschool De Kempel	Markus Verbeek Praehop	Wittenborg University of Applied Sciences
Hogeschool der Kunsten Den Haag	Marnix Academie	
Hogeschool Dirksen	NCOI / Pro Education	Zuyd Hogeschool
Hogeschool E3	Nederlandse Loodsencorporatie	
Hogeschool Inholland	Nederlandse School voor Onderwijs Management	
Hogeschool iPabo	Netherlands Business Academy	
Hogeschool ISBW	Netherlands Maritime University	

e) Dutch Universities

Centre for Latin American Research and Documentation	Protestantse Theologische Universiteit	Technische Universiteit Delft
Erasmus Universiteit Rotterdam	Radboud Universiteit Nijmegen	
Faculteit Militaire Wetenschappen	Stichting Hogeschool van Amsterdam	Technische Universiteit Eindhoven
Landelijk Expertisecentrum Sociale Interventie	TIAS School for Business and Society	Theologische Universiteit Apeldoorn
Maastricht School of Management (MSM)	TSM Business School	UNESCO-IHE Institute for Water Education
Maastricht University	Rijksuniversiteit Groningen	Theologische Universiteit Kampen
Nyenrode Business Universiteit	Universiteit Leiden	transnationale Universiteit Limburg
Open Universiteit	Tilburg University	Universiteit van Amsterdam
Universiteit Twente	Universiteit Utrecht	Universiteit voor Humanistiek
Vrije Universiteit Amsterdam	Wageningen University	

f) Vocational Education

The vocational education and training system (VET) in The Netherlands is called VMBO (voorbereidend middelbaar beroepsonderwijs) and prepares students for both work and further education. Key aspect in the vocational education is linking education to the labour market. VET schools therefore maintain extensive relations with regional businesses, municipalities and social organisations. If students wish to extend their education they may progress to further education in their own VET school or in universities of applied sciences. VET is offered by regional education centres (ROC), agricultural education centres (AOC) and a small number of specialized and private institutions. Despite the different ways of funding for these institutions, all of the VET programs obtain recognition from the minister of education. Almost every VET school is mostly or partially funded by the government, but private institutions receive their funding through private investors. The VET system educates through four different levels:

1) VET level 1

The first level of VET consists of training for simple practical work and gives access to the labour market as an assistant worker. There are no formal requirements for entering this level. The level 1 diploma also gives admission to VET level 2. This first level program lasts six months to a year.

2) VET level 2

The second level of VET consists of a basic vocational training to perform practical work. A VET second level diploma is an entry qualification for the labour market and also gives admission to VET level 3 programs. VET level 2 programs last two to three years.



3) VET level 3

The third level of VET consists of training to become an independent practitioner able to work independently across a range of activities related to the occupational area. VET level 3 is an entry qualification for the labour market and gives admission to VET level 4 programs. VET level 3 programs last two to four years.

4) VET level 4





The fourth level of VET consists of middle-management and specialist training, able to execute work independently as a generalist or specialist in an occupational area. Level 4 of VET is an entry qualification for the labour market and gives admission to higher education. Level 4 programs last three to four years.

Vocational education and training contains 2 sorts of learning pathways. Working and learning are key elements to this educational system and therefore internships and working experience are combined in these two forms:

-  School-based pathway (BOL) is a pathway in which students will have one or more periods of work placement during their course. This work placement can range from a minimum of 20% to a maximum of 60% of their course.
-  On-The-Job training pathway (BBL) is a pathway in which students work four days a week in a work placement and follow one day of theoretical education a week. On average student who follow this pathway are older than those who follow a school-based pathway.

Both the school-based pathway and the on-the-job training pathway lead to the same level of qualification and diploma.

Fields of interest used by VET centres differ. VET courses can be divided into four fields:

-  Health and Welfare
-  Engineering
-  Economy
-  Green sector

g) Regional Educational

Regional educational centers (ROCs) offer training in the sectors of Health and Welfare, Engineering and economy. AOCs offer training in the green sector, such as agriculture, plants, animals, green design and environment. Specialist institutions focus on training for one professional branch. Examples of specialist courses are shipping or graphic design.

1) Dutch Regional VET centres

<i>ROC A12</i>	<i>ROC Leiden</i>
<i>ROC Albeda College</i>	<i>ROC Menso Alting</i>
<i>ROC Alfa College</i>	<i>ROC Midden-Nederland</i>
<i>ROC van Amsterdam</i>	<i>ROC Mondriaan</i>
<i>ROC Arcus College</i>	<i>Noorderpoort</i>
<i>ROC Aventus</i>	<i>ROC Nijmegen</i>
<i>ROC Da Vinci College</i>	<i>ROC Nova College</i>
<i>Deltion College</i>	<i>Regio College</i>
<i>ROC Drenthe College</i>	<i>ROC Rijn IJssel</i>
<i>ROC Flevoland</i>	<i>ROC RIVOR</i>
<i>ROC Friese Poort</i>	<i>Summa College</i>
<i>Friesland College</i>	<i>ROC Ter AA</i>
<i>ROC Gilde Opleidingen</i>	<i>ROC Tilburg</i>
<i>ROC het Graafschap College</i>	<i>ROC TOP</i>
<i>Hoornbeek College</i>	<i>ROC van Twente</i>
<i>ROC Horizon College</i>	<i>ROC West-Brabant</i>
<i>ROC ID college</i>	<i>Scalda</i>
<i>ROC Koning Willem I College</i>	<i>ROC Zadkine</i>
<i>ROC Kop van Noord-Holland</i>	<i>Scholengemeenschap De Rooi Pannen</i>
<i>Landstede</i>	<i>MBO Utrecht</i>
<i>ROC De Leijgraaf</i>	<i>MBO Amersfoort</i>
<i>ROC Leeuwenborgh</i>	

h) Main stakeholders

1) Ministry of Education, Culture and Science

The ministry of Education, Culture and Science is the governmental entity who is responsible for the national educational system. Its mission is to ensure that everyone gets a good education and is prepared for responsibility and independence. The Ministry also wants people to enjoy the arts, and aims to create the right conditions for teachers, artists and researchers to do their work.

2) The Social and Economic Council (SER)

The Social and Economic Council (SER) comprises representatives of employers' and workers' organisations and government-appointed experts. SER advises the Dutch Government and the Dutch Parliament on socio-economic policy. SER also carries out administrative and supervisory functions, including the supervision of production and industry. According to the Law on Industrial Organisations, SER represents not only the special interests of industry (both employers and workers) but also encourages business in the context of the public interest.

3) The Education Council

The Education Council is an advisory body on education for the Education Minister, the Minister for Economic Affairs, Agriculture and Innovation, the first and second chambers, the Government and the municipalities. The Council offers independent advice on headline policy and legislation in the field of education.

4) The Primary Education Council (PO-Council)

The Primary Education Council is the employers' organisation and the main advocate for school boards and primary education schools (including special schools) and special (secondary) education. The Council focuses on three main areas, namely, funding, employment in the sector and headline education policy.

5) The Secondary Education Council (VO-Council)

The Secondary Education Council is the employers' organisation and the main advocate for school boards and schools in secondary education. Over 334 school boards and 600 schools are members of the Council which covers more than 95% of schools funded by the Education Minister. The Council negotiates with employee organisations on collective labour agreements for over 120,000 people.

6) The Council for VET and Adult Education (MBO-Council)

The Council for VET and Adult Education is the main association and advocate for secondary vocational and adult education. The Council has 66 member institutions funded by the Education Minister. The Council represents the common interests of its members and provides services and joint activities related to these interests. Almost 40% of the Dutch workforce is trained in VET annually, amounting to some 630,000 participants. The Council negotiates with employee organisations on the collective labour agreements for over 53,000 employees in VET and adult education.

7) The Agricultural Education (AOC) Council

The AOC Council is the association, employers' organisation and main advocate for agricultural education, including training in food and the natural and living environment. All the 13 institutions funded by the Department of Agriculture are members of the Council.

8) COLO

COLO is the association of the CRAs. Its primary role is advocacy, the promotion of cooperation between CRAs and reporting on behalf of CRAs.

9) The Higher Professional Education Council (HBO-Council)

The Higher Professional Education Council is the association and main advocate for HE. All 39 publicly-funded HEIs are members of the Council, which represents its members' interests to government, politics and civil society. The Council is also an employers' association which consults with government and unions on the working conditions in the Higher Professional Education sector.

10) The Association of Universities (VSNU)

The Association of Universities (VSNU), the association and main advocate for the 14 Dutch universities, represents its members' interests to government, politics and civil society. VSNU is also an employers' association which consults with government and employee organisations in the university sector (which employs c. 52,000 people). VSNU also provides service activities for its members.

11) The Social Partners (Employers and Trade Unions)

There is employer and employee representation in most sectors in The Netherlands. Employee and employer organisations take collective decisions in the field of industry, education and employment. This is achieved through joint committees such as the Collective Agreement Committee (CAO) and the Education and Training Committee.

12) Dutch counsel for training and education (NRTO)

The NRTO, Dutch Council of Training and Education, is the umbrella trade association of private training and education providers in the Netherlands. The NRTO promotes the interests of private providers of training and education. Companies as well as other trade associations can join the NRTO. In the Netherlands, there are around 16,000 registered private providers in 2014 enrolling more than a million participants. The NRTO only covers private funded education and training; hence, publicly-funded providers are not included. The level of representation is regional, national as well sectoral, but the focus is on national level. Overall purpose of the association: The NRTO has an important role in promoting private provider training and education in the Netherlands.

13) Foundation for vocational education and business (S-BB).

The foundation for vocational education and business is the connection between education and business. The S-BB is responsible for the recognition and supporting of training companies, which are used to educate students in a working environment. Secondly the foundation provides knowledge of the area of the labour market, internships and work placements. With this knowledge the foundation advises the ministry of

Education, Culture and Sciences and the ministry of Economics about the connection between secondary vocational education and the labour market.

i) Quality Assurance

1) Quality assurance of primary education

Pupils and their parents must be confident that their school provides education of an appropriate quality. The Inspectorate therefore monitors the quality of education for VMBO, HAVO and VWO. The monitoring is risk-based – i.e. the Inspectorate looks every year, using a risk analysis, to see if there is any evidence that a school lacks quality. If the analysis indicates no risk then the school receives a so-called ‘basic supervision’. If the analysis indicates possible risk, the school will be required to provide additional information. The Inspectorate then examines the nature and background of the perceived risk and a more detailed analysis of both the additional information supplied and the original information gathered is carried out. If the result is positive (i.e. the school shows a high enough level of quality) then the inspectorate will return the school to basic supervision. The findings of each inspection are public. The Inspectorate of Education uses a specific framework for each of the two different education sectors.

The school board is responsible for the quality of education at the school, the financial situation and the compliance with the laws and regulations. The board is accountable for the school’s results.

2) Quality assurance of VET education

The Inspectorate of Education monitors both public and private examination institutions in VET. The monitoring of the institutions comprises three phases. 1 In Phase 1, review of the institutions is undertaken to identify possible shortcomings in the quality of education or the management of the institute. 2 Where difficulties have been identified in Phase 1, the Inspectorate carries out further investigations into quality issues. 3 Where deficiencies are identified in Phase 2 (in delivery of programs, examinations or financial or legal compliance) action is taken to address them as soon as possible on the basis of agreements reached with the institution concerned. After one year the Inspectorate reviews the results of the agreed program of quality improvement. Should there be no evidence of improvement in the institution the Inspectorate then informs the Education Minister of the situation. As a result the Minister may withdraw the institution’s license to deliver courses. Finally, the Inspectorate monitors the examinations. The quality of examinations is assessed independently of the quality of education. This assessment is conducted annually based on a sample of programs in each publicly funded school do decide whether the examination instruments meet the national requirements. Central to this is the appropriate level of qualification and the reliability of the examination.

3) Quality assurance of higher education

Quality assurance in higher education is primarily concerned with compliance on law and legislation, education policy and examination. The monitoring of higher education is regulated by the Law on Higher Education and Scientific Research and by the Law on Education Inspection (WOT). The Inspectorate ensures that HE takes account of the law in the delivery of education, the applicability of admission criteria, the administration of examinations and doctoral and the awarding of diplomas. The Inspectorate also oversees the board’s and the council’s compliance with the laws. At the request of the Education Minister, the Inspectorate also investigates specific aspects of higher education, for example, the functioning of the

Bachelor–Master structure, attention paid to specific groups of students, as handicapped people and migrants, the entry and transfer of students in engineering programs and the quality of examinations.

4) Quality assurance of adult education

Adult education comes under the Inspectorate for Education (VET and adult education). For the examinations of VAVO the same rules are applicable as in the Law on Secondary Education and the frameworks of the Inspectorate of Education.



5) Quality assurance of private education

Private education providers accredited by the Education Minister comply with the quality rules and requirements of funded institutions. In addition, professional and industry sectoral associations have formulated their own quality codes. NRTO members sign the Code of Conduct for Training and Education and are also obliged to use the Terms and Conditions as drawn up by the NRTO and the consumer organisation, “Consumentenbond”. In case of a dispute the consumer or the training and education agency can make use of an out-of-court dispute resolution scheme (known as De Geschillencommissie). Any agency aspiring to become a member of the NRTO is assessed by the NRTO Committee on Quality. An evaluation is made of the degree of compliance with the requirements of the Code of Conduct. The Committee on Quality also investigates any indications of poor quality which they are aware of. Finally, the NRTO carries out an annual survey of all members on the degree of compliance to varying aspects of the code.

j) Accreditation

1) Accreditation of higher education

Monitoring the quality, the quality of specific programs in HE is monitored by the accreditation system managed by the Dutch-Flemish Accreditation Organisation (NVAO). The Dutch-Flemish Accreditation Organisation (NVAO) is a bi-national public accreditation organisation in both regions established by a treaty between the Netherlands and Flanders to ensure the quality of HE in both jurisdictions. The NVAO:






-  Monitors Dutch and Flemish HE and independently ensures the quality of HE in The Netherlands and Flanders by assessing education and providing a quality mark. It also contributes to improving the quality of HE and it promotes the positioning of HE from both national and international perspectives. Only NVAO-accredited programs are recognized by the Government and receive funding. The Dutch and Flemish ministers monitor the functioning of NVAO and the Dutch inspectorate monitors the Dutch accreditation system as a whole. Agreements are made between the Inspectorate, NVAO and the Ministry of Education Culture and Science.
-  The accreditation is based on learning outcomes as formulated in the Dublin descriptors.

2) Accreditation of prior learning

With accreditation of prior learning (APL), an individual can validate the knowledge, skills and competences, which he or she has gathered over time. These competences can be acquired in various ways through formal, non-formal and informal learning. An APL procedure gives a picture of an individual’s knowledge, skills and competences against a chosen (qualification) profile. To guarantee the civil effect of APL a (qualification) profile with recognized standards is used. These include all regulated qualifications in VET and

HE. In addition, sector qualifications requested and developed by branches of an occupational area can function as APL standards.

There are great differences between validation processes in different countries. Specific characteristics of APL in the Netherlands are:

-  Determination and recognition of skills always takes place along the line of a national standard.
-  It is an open market: public as well as private education and training institutions can offer APL.
-  APL is orientated to the labour market (career development) as well as to education and training (to shorten the education program)
-  All people can follow an APL procedure. There are no specific target groups.
-  An APL procedure always ends with a certificate of experience.

The use of APL is financially supported by tax measures for the employers as well as for individuals. An APL procedure consists of the following steps:

3) Intake

During the intake phase the APL candidate receives information concerning the APL process. Together with the candidate the targets of the APL procedure are set and an APL agreement is signed by both parties. An APL procedure has as its point of departure one specific standard.

4) Drafting the portfolio

The candidate fills in – under the supervision of a coach – his/her portfolio, including evidence of the knowledge, skills and/or competences acquired. Demonstrating the achieved skills can also take place in another way, e.g. through a criterion-oriented interview or on the basis of research at the workplace.

5) Judgment

The assessor (a professional reviewer) gives a judgment if the candidate complies with the given criteria for the chosen standard based on the evidence in the portfolio.

6) Experience certificate

The final result of an APL procedure is always a certificate of experience written by the assessor. This describes what the candidate knows and can do in relation to the chosen standard and how this is proofed.

7) Quality assurance of prior learning

In 2006 a covenant between stakeholders was been signed to increase the accessibility, secure the quality, promote the use and ensure the transparency of APL. The covenant partners included representatives of employers' and workers' organisations, the Ministry of Education, the Ministry of Social Affairs, the umbrella organisations of providers of VET and HE and representatives of the private education sector.

To monitor progress on these goals, an APL Quality Code (Kwaliteitscode EVC) was developed by the covenant partners. All providers in the Netherlands must comply with this code. APL providers are controlled periodically by assessment agencies to receive an accreditation for a specific standard.

By the end of 2009 the Government had taken the initiative to give a quality impulse to APL. In relation with this initiative the policy regulation "Afgifte EVC-verklaringen" (Delivery of APL certificates") was published in

April 2010, based on the APL Quality Code of APL. The policy regulation includes the “up-or-out” principle. This means that only those providers of APL providing the required quality will remain in the system. A consequence is that for an organisation which loses its recognition as an APL provider, the procedures for APL by the provider concerned are no longer tax-deductible. Besides the formal regulation, APL providers are supported by the APL Action Plan, which is implemented by the APL Knowledge Centre. Besides a style guide for writing the experience certificate, the Centre also offers training courses on different issues in running APL processes.

The five components of the APL Quality Code are:

1. **Objective APL** The purpose of APL is to reveal, appreciate and recognize specific competences. The recognition of prior learning is a value in itself and contributes to employability. APL leads in many cases to further personal career development.
2. **Rights** APL meets the needs of the individual. Rights and commitments are clearly articulated and assured.
3. **Research Procedures** and instruments are reliable and based on recognized standards. “Trust” is a keyword. Trust has to do with well-defined standards, civil effects and clear information about how assessments are conducted and what arguments conclusions are based on.
4. **Assessors and supervisors** Assessors and supervisors are competent, independent and impartial. Independence and impartiality are key factors in the assessment and are embedded in the roles and responsibilities of the assessors. It is important to avoid confusion of roles. Impartiality can be strengthened through training and participation in learning networks.
5. **Quality** The quality of the APL process is secured and constantly improved. The qualities of the APL procedure and of the instruments used during the procedure are assured through the quality arrangements. There are regular evaluations, following which results are incorporated into actions to secure improvements

k) NQF & EQF

1) NQF

The Dutch ministry of Education is committed to implement a Dutch National Quality Framework. Currently a bill is prepared by the Dutch National Coordination Point to secure the NQF in Dutch Law. This bill requires that Dutch educational institutions to capture the levels and qualifications of the framework on their diploma’s. The bill focuses on higher educational systems that are funded by the Dutch government. Due to the Dutch elections in March 2017 and the recent appointment of the new Dutch parliament, expectations are that the passing of the bill could take several months or years.

2) EQF

The Dutch National Qualification Framework is based on the European Qualification, but the Dutch NQF is more specified on the Dutch society. Like the EQF the Dutch NQF uses 8 levels of qualification divided in knowledge, skills, responsibility and autonomy. The Dutch NQF specifies these qualifications into more specific learning outcomes, linked to Dutch societal demands and requirements for the labor market. Overall, the Dutch NQF is based on the EQF, but more specified.

l) Apprenticeships & others forms or learning

1) Apprenticeships

In The Netherlands, there are four kinds of apprenticeships:

1. “Orienting” apprenticeship

This kind of apprenticeships is mostly used in secondary education to provide students with knowledge about the labour market. On average most students don’t actually perform any work during this internship, but participate for one or two days in an organisation. Students can use these apprenticeships to orientate themselves on which way they want to pursue further education.

2. Introduction apprenticeships

This kind of apprenticeship is mostly used in the first year of higher education to become acquainted with the labour market. Students mostly perform small task to become acquainted with the organisation. Students can use these apprenticeships to become familiar with the area of work.

3. Experience apprenticeships



Mostly occurs during the second, third and / or fourth year of higher education. These kinds of apprenticeships are intended to gain experience in the area of work. Students mostly participate in an organisation and perform regular task while under supervision. Students can use these apprenticeships to gain experience while working under supervision.

4. Graduation apprenticeships

Occurs as part of the graduation program in higher education. Students perform specific tasks or research specified on working level. Combined with these tasks and / or research students have to write a thesis on academic level.

m) Informal and Non formal Learning

The Dutch counsel of education defined formal and non formal learning in the following way:

-  Formal learning is equal to learning in school conditions.
-  Non formal learning is learning outside of school conditions, but learning takes place in an intentional and organized setting.

As mentioned before, formal learning is set by Dutch law and recognized throughout The Netherlands. There are multiple institutions, laws and other measures the quality and recognition of formal learning in The Netherland. Examples of formal learning are short term education, training, workshop and conferences. Formal learning always results in diploma or a certificate. Non formal learning does not result in a formal diploma or certificate, but mostly focuses on personal development. Examples of non-formal learning are coaching interviews, inter- and supervision and self-reflection. Non formal learning is not recognised in The Netherlands.



ESSA-SPORT

Improving the Supply of Skills to the Sector

6

**NATIONAL SPORT
EDUCATION AND
TRAINING SYSTEM**



6. NATIONAL SPORT EDUCATION AND TRAINING SYSTEM


a) Sport in schools

The Dutch school system has regulations for sport in primary education, secondary education and VET education.


1) Primary education

In primary education the sport system is anchored by law in so called 'core goals' (Dutch: kerndoelen). Primary schools have full autonomy to shape their own curriculum, as long as they conform to the core goals. Every pupil who enrolls in primary education has the right on physical education.

These core goals for sport in primary education are:

-  The students learn to participate responsibly in their surrounding movement culture and learn to experience and execute the main principles of the most important forms of movement and play.

The main principles of movement are: balancing, jumping, climbing, rocking, tumbling, running and dancing. The main principles of play are: tapping games, goal games, aiming games, juggling and wrestling games.

-  The students learn to participate in activities in a respectful manner with others, make arrangements for regulating them, assess their own mobility opportunities, and take this into account during these activities.

There is no legal standard on the amount of physical education in primary education. There was a standard on how many hours physical education must be taught, but this standard was let go of in 1996. Based on the current educational policy, pupils should get physical education two times a week for a minimum of 45 minutes.

Since 2006 physical education can only be taught by primary teachers with an additional qualification in physical education or by a specialised teacher in physical education. These requirements are obligated for teaching physical education from the third grade onwards. The basic document physical education for primary education is a document in which physical education's core goals are translated into learning programs with specific activities. Teachers in primary education can use this document to shape their physical education lessons into a substantiated lesson to maximize a pupil's development.







2) Secondary education

Secondary education sport can be divided in lower years and upper years (as mentioned previously).

Lower years

Sport in lower years, like primary education, is based on so called 'core goals'. These goals focus on broad orientation on multiple kinds of sport and the possibility to develop pupils' skills to participate in multiple fields of sport. Secondly the goals focus on the development of cooperation skills, because sport highly demands skills in this aspect. A third focus of the core goals is health and the way sport can contribute to health and welfare.

Core goals in secondary education, lower years:

-  Students practically learn to orientate themselves on multiple fields in sport like gymnastics, athletics, dancing, self-defense and current developments in sport. Furthermore students explore and develop their own skills en possibilities in these fields.
-  Students expand their own skills and possibilities through challenging exercises.
-  Students learn to execute the main principles of sport on their own level.
-  Students learn to be sportive, take into account skills, possibilities and preferences of others and to respect en take care of each other during sport activities.
-  Students learn to perform regulatory tasks in which they can exercise independently or with others.
-  Students learn through participation in sport what the value of sport is for health and welfare.

Higher years

Sport in higher years is based on end terms. These end terms are specified to the different educational profiles. Based on the field of interest students, end terms in sport differ. All the end terms can be found on:

http://www.slo.nl/downloads/archief/Handreiking_lichamelijke_opvoeding_DEFINITIEF.pdf/

Educational institutions are obligated to teach physical education all year. In 2006, the Dutch lesson table was abolished, except for physical education. On request of the Dutch Federation of Teachers of Physical Education (KVLO), the educational inspection provided guidelines for physical education. On average, the amount of physical education lesson that must be taught are 2.5 hours a week for VMBO, 2.2 hours a week for HAVO and 2 hours a week for VWO. These amounts are based on at least 50 minutes of exercise per hour and 40 weeks a year. Physical education in secondary education can only be taught by teachers with an education in physical education. In The Netherlands these educations are provide by academies for physical education (ALO). On completion, teachers receive a first degree in teaching on which they are recognized as a teacher who can educate on all levels of education in their field of interest. In secondary education, teachers can utilize the 'basic document for lower years in secondary education' and the 'basic document for higher years in secondary education', which provide in teaching programs and exercises to translate the core goals and end terms into specific lessons.

3) VET education

VET education does not require mandatory physical education. With the introduction of the bill on education and vocational education in 1996, sport isn't part of the curriculum. Although physical education isn't mandatory, the Dutch government has implemented an insensitive program to accomplish that 5 percent of education consists of physical education.

Furthermore, the Platform Exercise and Sport VET are fighting for physical education. Their mission is 'a healthy VET school supports students to develop themselves to vital employees and citizens'. Their goal is to get 50% of the mandatory educational time (1.000 hours) spent on physical education and exercise. 37 VET schools already committed themselves to this platform.

Like higher education, physical education in VET education can only be taught by teachers with an education in physical education at the academy for physical education (ALO).

b) Provision of sport qualifications

Sports qualifications in the Dutch educational system can be obtained through an education at universities and universities of applied sciences. Sports education at universities of applied sciences is focused on the practical implementation of skills and knowledge in everyday work. Sports education in universities is more policy-orientated side of sport, focusing on strategy and making policy. Both education pathways educate students to professionals who can act as independent individuals in the labour market. VET education also offers sports qualifications, but these are more focused on an assisting role to professionals. These kinds of education will be outlined further down this report. A full list of universities and universities of applied sciences offering sports qualifications are listed on the next page.

1) Universities of applied sciences

Institution	City	Education
Christian university of applied science Windesheim	Zwolle	Movement agogics / Psycho locomotive therapy
		First degree teacher of physical education
		Sports and movement
University of applied sciences the Hague	Den Haag	Motion technology
		First degree teacher of physical education
		Sport management
Fontys universities of applied sciences	Eindhoven	First degree teacher in physical education
		Sports & Leisure
		Sports & Wellness
	Tilburg	Masters of Sports (Master)
		Sport & Media
		Sport and movement education
		Sport and Marketing / Management
Sport marketing en Commercial Economics		
Hanze university of applied sciences Groningen	Groningen	Operational Sport management
		First degree teacher in physical education
		Sport, Health and Management
University of applied sciences Inholland	Amsterdam	Higher Tourist and Recreational Education
		Leisure management
	Haarlem	Higher Tourist and Recreational Education
		Sport and Movement
	Rotterdam	Higher Tourist and Recreational Education
	University of applied sciences Rotterdam	Rotterdam
Sport marketing and Management		
Leisure management		
University of applied sciences Amsterdam	Amsterdam	Commercial Sport Economics
		First degree teacher in physical education
		Sport, Management and entrepreneurship
		Sport management
		Sport marketing
		Nutrition and Dietetics
University of applied sciences of Arnhem and Nijmegen	Arnhem & Nijmegen	Sport and Movement innovation (Master)
		First degree teacher in physical education

		Sport en Movement education
		Sport, Health and Management
University of applied sciences Van Hall Larenstein	Wageningen	Equine, leisure and sports.
University of applied sciences Zeeland	Vlissingen	Sport en Movement education
		Vitality management en tourism
NHTV international higher education	Breda	Commercial Economics (Sport marketing specialization)
		Bachelor Tourism en Recreation
		Higher Tourism and Recreation Education
		Leisure management

2) University (bachelor)

University	Bachelor	Minors / Specializations
VU - Amsterdam	Movement sciences	Sport
		Health
		Construction, operation and control of the movement system
		Psycho locomotive therapy
		Sport, Movement en Health
RUG - Groningen	Movement sciences	
	Economics & Business	Sports economics
	Behavioral and social sciences	Sport and exercise psychology
UM – Maastricht	Health sciences	Movement sciences
UvA – Amsterdam	Psychology	Sport psychology
RUN - Nijmegen	Social sciences	Action and sport
UU - Utrecht	Multiple faculties	Sport psychology
		Sport, pedagogy and policy

3) University (master's)

University	Master	Minors / Specializations
VU – Amsterdam	Human movement sciences	Sport
	Fundamental and clinical human movement sciences	
	Law	Sport and Law
UvA - Amsterdam	Law	Labor en sport
	Sport and performance psychology	
RUG - Groningen	Movement sciences	Sport, education and performance
		Movement, Health and aging
		Locomotive recovery and revalidation
UvT - Tilburg	Leisure studies	Contemporary themes in sport, tourism and culture
UM - Maastricht	Physical activity and health	Sports and physical activity interventions
		Biology of human performance and health
UU – Utrecht	Sport policy and sport management	
	Social sciences	Sport as panacea

c) Role of sport federations

Each sport federation has her own rules and regulations in areas as coaching, officiating, volunteering, management and administrating. There is no national educational system for these areas, thus sport federations have to create their own educational system to provide the knowledge and skills. It differs by sport federations in how detailed regulations are on the area.

1) Academy for sports

The Academy for Sports is part of the Dutch Olympic and National Federation (NOC*NSF) and is founded in 2006 for and by sport federations. Through further professionalisation of sports, the need increased for better and more educated technical, administrative and arbitral staff. The academy provides new competence training for further development of sport. The quality of sport is determined by the staff that regulates it. The ambition of the Academy is therefore: "for each athlete a competent trainer/coach/instructor and for every game a competent referee, created by competent staff".

2) Coaching

In most sports it is required by the federation that trainers / coaches of selection teams are in possession of a trainers / coaching's license. A license can be obtained through completion of a trainings program. Federations are responsible for the trainings program and can link those to international trainings programs by European or international federations. The Dutch Football Association (KNVB) uses this technique, linking the different internal training programs to the UEFA license requirements. In professional sports, coaching licenses are mandatory for coaches. Due to possible European matches and tournaments, these licenses must be obtained by European and international standards.

In amateur sports, licenses are mandatory for trainers and coaches who manage selection teams. Trainers and coaches from recreational teams do not have to own a license. In 2012 The Dutch Olympic Committee and the Workers organisation in sport provided the qualification profiles for trainers and coaches. This document can be used as a referencing document to provide structure on which skills and knowledge trainers, coaches and instructors must have.

3) Officiating

Like coaching, officiating is managed by federations. In professional sports, officials must have a license to manage matches and tournaments. These licenses on professional level must meet the criteria as set by international federations, due to the possibility of European and international matches and tournaments.

In amateur sports, only officials for selection teams must have the proper licenses. These can be obtained by a completion of the trainings program. The national sport federation is responsible for such a trainings program, but does not have to meet international criteria. Non selection team officials are not obligated to obtain a license, but are encouraged to do so. In some sports, officials are provided through the national sports federation. These officials are always obligated to have a license.

4) Management and administration

National sport federations provide support programmes for clubs in the area of management and administration. Their goal is to provide clubs with the skills and knowledge to continue their operations without problems.

5) Volunteering

National sport federations provide support programs for clubs on how to attract and maintain volunteers in their organisation. There are no further educational programs provided by national sport *federations*

d) NQF in sports

The NQF in sport is not different from the implementation in other areas.

The Dutch ministry of Education is committed to implement a Dutch National Quality Framework. Currently a bill is prepared by the Dutch National Coordination Point to secure the NQF in Dutch Law. This bill requires that Dutch educational institutions to capture the levels and qualifications of the framework on their diploma's. The bill focuses on higher educational systems that are funded by the Dutch government. Due to the Dutch elections in March 2017 and the recent appointment of the new Dutch parliament, expectations are that the passing of the bill could take several months or years.

e) Private training providers

Private training providers are educational institutions whom are not funded by the government. Although these institutions are not funded by the government, their programmes can get recognised by the government. A List of Dutch private training providers is listed below.

Institute	Level	Program
Wagner Group	MBA	Sport management
Johan Cruyff Institute	Master	Sport management
		Coaching
		Sport & Facility / Event Management
Johan Cruyff Academy	Bachelor	Sport marketing
Johan Cruyff College	MBO	Sport & Business
Business of sports academy	Post HBO	Sport event management
		Business Sport Management
AALO	MBO	Fitness
		Group fitness
		Yoga & Pilates
		Nutrition
	HBO	Nutrition & dietetics
		Sport management
		Physiotherapy
LOI		Personal trainer
		Sport management
		Sport massage
		Sport psychology and coaching

		Sport nutrition
		Nutrition
NCOI	HBO (B)	Commercial economics (sport management)
		First degree teacher in physical education
		Sport management
	HBO course	Movement and exercise physiology
		Sport and Nutrition
		Sport, Movement and Health
		Sport, Lifestyle en Movement
		Sport and Movement education
		Sport and event management
		Sport policy and marketing
		Sport culture and lifestyle
		Sport instructor
		Sport management
		Sport psychology
		Sport training and nutrition
		MBO (4)
	Sport, Movement and Health coordinator	
	Sport and Movement agogics	
	Sport instructor, Training en Coaching	
NTI	HBO (B)	Sport management
		Nutrition and Dietetics
	MBO (4)	Fitness instructor
		Sport massage
		Weight consultant
	Scheidegger	MBO (2)
MBO (3)		Sport and movement leader
Scheidegger	MBO (4)	Sport massage
		Fitness instructor
	HBO	Physiotherapy

		Sport management
		Sport management en Coaching
		Nutrition and dietetics
		Sport psychology

f) Continuous Professional Development

We don't have national policy but there are a lot of opportunities for the individual. CPD is a part of lifelong learning and may encompass any kind of education or training. The responsibility for providing this kind of extra educational activities or training lies with employees. Some organisations provide extra budget for educating their employees, but not all organisation do so. Offering additional training or education is not mandatory for employers. For employers and employees who do desire to develop themselves, they can enroll in multiple programs, courses or start a new part-time education.

g) Recognition non formal and informal learning

In The Netherlands skills and knowledge obtained through informal and non-formal education can objectively reviewed and certified through the EVC. EVC stands for Erkenning van Verworven Competenties or Recognition of Acquired Competences. The Dutch centre of EVC offers a program for organisations and individuals for official recognition of prior informal and non-formal learning. This program consists of the following steps:

1) Intake: Quick scan and advice

The first step of the program contains a quick scan. This quick scan maps the skills and knowledge from an individual acquired through informal and non-formal learning. Based on the outcomes of this quick scan an EVC consultant assesses skills and knowledge in comparison to levels of learning and standards.

2) Portfolio: EVC-tool

Participants build up a portfolio to display their knowledge and skills on a specific matter and on a specific level. This form of portfolio building is based on practical assessments like function descriptions, assessment reports and practical papers. Participants are supported by a portfolio mentor.

3) Personal assessment

On completion of the portfolio one or two assessors review the portfolio. Depending on the chosen procedure and levels of learning, a personal assessment will be conducted.

4) Certification and advice

Based on the assessment of the portfolio, participants receive a certificate. This certificate describes the competences, knowledge and skills in comparison with national standards on the relevant level of learning.

Participants can, with this certificate, objectively demonstrate the level of learning they can perform on, what competences, skills and knowledge they have obtained. The total process of recognition takes six up to twelve weeks to complete.

h) Training for volunteers

Education, training and other development programs for volunteers are offered by multiple actors. The first one is the 'Academy voor Sportkader', or Academy for sport frameworks. The "Academy voor sportkader" (ASK) is part of the unit sport development by the Dutch National Olympic Committee. The ASK was founded in 2006 by and for sport federations. The NOC and the sport federations work together in the development of the structure of competence-based education which result in a more effective and efficiency sport structure. The goal of ASK is to "provide each athlete with a competent trainer / coach / instructor en for each game a competent referee in safe environment, created by competent sport administrators". Secondly, sport federations offer sport specific training for volunteers. Beside the 'broad' training and development opportunities offered by the ASK, the federations offer training and development opportunities for volunteers in terms of becoming a referee, trainer or coach and other sport specific functions. The branch organisation 'Netwerk in de Sport' is responsible for the collective labor agreement for sport clubs. This collective labour agreement contributes to a more professional and effective sport structure in The Netherlands. They also provide training for volunteers of sport clubs in regard to the collective labor agreement and how to deal with complex situations.

i) Qualifications by law

There are no qualifications required by law to work in sport, except the qualifications for teaching in physical education. Under the rules of federations there are different kinds of requirements to work in sport. The National Olympic Committee (NOC*NSF) collaborated with the workers organisation in sport (WOS) to provide federations with the Qualification Structure Sport (KSS). This document provides five qualification profiles, based on 25 profile aspects. This KSS supports federations in knowledge and skills to gain understanding on which qualifications are required. Each federation has the possibility and responsibility to make their own rules on qualifications for working in sport. Based on the qualifications necessary according to federations, rules and regulations can be implemented by federations. Due to the autonomy of sport federations, these rules and regulations differ on each federation.

j) Education and training in sub-sectors

1) Coaching and Officiating

Education and training in the area of coaching and officiating is provided by national sport federations. Each federation, as mentioned previously, has own rules and regulations in the areas of qualifications and therefore also in coaching and officiating. The provision of education and training in coaching and officiating comes from federations. On professional and higher levels of amateur sport, federations are responsible for providing and implementation of educational and training programs for coaches and officials. On lower levels of amateur sport, federations provide the educational and training programs for sport clubs. Sport clubs themselves are responsible for the implementation of these programs. Due to differences in sport, the educational and trainings programmes differ in each federation.

2) Management and Administration

Management and administration are independent sectors with their own skills and level of knowledge. Most educational programs for these fields are provided by universities, universities of applied sciences and sometimes in VET education. These programs are mainly focused on business, but very little on sport. Management and administration focused on sport are provided by a select few institutions like the Johan Crujff Institute and The Wagner Group. Besides the specialisation in sport, no further diversity is provided in education in the area of management and administration.

3) Fitness

The educational and training system in fitness is regulated by NLactief. NLactief is the Dutch umbrella organisation for all recognised fitness centres. All centres that joined the NLactief are tested and certified. Due to this certification NLactief also provides education and training in the area of fitness. Where NLactief provides the educational programmes and training, educational institutions as universities and private institutions are charged with the implementation of education and training. Regular educational programmes are offered to students and students can use their specialisation program to obtain fitness qualifications.

4) Outdoors

Outdoor education is primary provided by private educational institutions. Due to the specialised nature of the outdoor activities, these kinds of training and education are also very detailed and specialised. Only a few VET educations are offered in this area.

5) Dual career

Dual careers are specialised programmes for top athletes. The aim of these programs is for athletes to combine their sport career with an educational one. The Dutch Olympic committee (NOC*NSF) therefore provide so called CTO's, centres for training and education. These centres are equipped with everything that athletes need to combine their living, training and education. Due to these conditions, athletes can train, live and educate in one place. Furthermore, NOC*NSF also provide NTC's, national top sport centers. Whereas CTO's provides living, training en educating for athletes, NTC's focus on one sport specifically. The Netherlands features 5 CTO's and 4 NTC's.

k) Monitoring qualifications

There is no central data collecting or system in which all the sport qualifications are being monitored. There are numerous monitoring systems specialized in monitoring certain qualifications in sport. For example, the Academy for Sport (ASK) monitors the training opportunities for staff, while NOC*NSF monitors all the education qualifications in sport.

1) Monitoring graduates in sports

Every 2 or 3 years the questionnaire on labour in sport is being held. Almost 3,000 people participated in this questionnaire, ranging from employers to employees and students. This questionnaire provides enormous insight in the numbers and jobs in which students are working. This questionnaire is the most important and biggest monitor and collection of data on various aspects of working in sport.

To secure students with a job on their level of knowledge and skills, various events are being organized, such as the National Career Fair, Alumni events, organisation festivities where students can introduce themselves

to multiple organisations etc. The job market in sport is growing and there a plenty of qualified students to fill those vacancies.

Where the job market in sport is growing, more jobs become available. But most of these jobs are part-time jobs. Starters can't live on half a job, so most of them keep on searching for jobs with a better salary, even if it is in another area than sport. Due to this development, more and more job become available, but no one is filling those positions.

The paradox lays in the fact that despite the growing amount of jobs and the growing amount of professionals in sport, more and more professionals looking for a job outside the area of sport. People don't want to work for half a job or a salary that is too low.



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7 FINDINGS FROM THE EMPLOYER SKILLS SURVEY

7. FINDINGS FROM THE EMPLOYER SURVEY

Understanding the characteristics of the labour market in a rapidly changing and growing sector like sport is fundamental to ensuring that education and training match the needs of employment. Only with a workforce of paid professionals and dedicated volunteers can we unlock the true potential of sport as a social and economic driver and help to create an active and healthy society. The survey was used as a tool to gather information from an employers' perspective on the characteristics, realities and tendencies of the labour market, organisation skill needs and gaps, difficulties in the recruitment process and the realities around the learning process. The target group included sport federations, sport clubs, providers of training and education, fitness and outdoors providers and other stakeholders in delivering sport.

a) Respondents and employment

In the Dutch results, 49 percent of the participants of the survey were sport federations and 22 percent represents sport clubs. Nearly a third of the participants have no employees (30.36%) and twenty percent has 20 to 49 employees. There is little difference in the other sport organisations. Either they have no employees and are probably managed by volunteers, or they are a relatively big organisation with 20 to 49 employees. Overall the staff turnover is rather stable in Dutch sport organisations. Over half of the organisation indicate that in the last twelve months the number of people employed remained the same, and expect to remain the same in the next two years. The most popular occupations known in the participants' organisations are senior management staff (79.6%), clerical & office staff (77.8), and middle management staff (75.9%). On average, almost a quarter of these occupations in Dutch sport organisations are fulfilled by volunteers.

b) Outcomes per type of occupation

In this section the specific results regarding the specific occupations will be presented and discussed is needed.

1) Sport Coach

In the Dutch results, nearly half of the participants indicate that they do not employ sport coaches, with the other half stating that they do. When asked about what the most important skills are for a sport coach, the Dutch sport organisations said they think that the following skills are essential: team working skills (96.3%), sport specific knowledge and skills (92.9%), performance evaluating and feedback skills and clear communication skills (both 85.2%). The skills which are regarded as the weakest or in need of improvement for the occupation of sport coach, are the ability to work with different participants, planning coaching sessions and programmes and the use of technology, equipment and tools (all 22.2%). Over half of the organisations have the same expectations of voluntary sport coaches and paid sport coaches (58%).

2) Outdoor activity leader and animator

In the Dutch results, only 5% of the organisations employ outdoor activity leaders and animators. For these organisations, the most important skills and attributes for this occupation are: communication skills, skills to ensure the safety and health of participants and motivational skills (all 100%). When asked about the skills which are regarded as the weakest or in need of improvement, working with people with disabilities is most mentioned by Dutch sport organisations (40%). Only 40% of the organisations have the same expectations of paid and voluntary outdoor activity leaders and animators.

3) Fitness instructor and personal trainer

In the Dutch results, almost eighty percent of the participants declared that they do not employ fitness instructors or personal trainers (78.85%). The most important skills and attributes which are required for the occupation of fitness instructor and personal trainer are communicating effectively with participants (100%), understanding the needs of the participants and designing sessions and programmes (both 90%). When asked about the weakest skills or the skills that are in need of improvement, team working skills (50%) and customer service skills (20%) are skills which need attention for this occupation.

4) Sport officials

In the Dutch results, over two-thirds of the sport organisations do not employ sport officials (67.31%). For the occupation of sport official, applying the rules and laws of the sport is the most important skill (100%). Other important skills and attributes for a sport official are decision-making skills (87.5%), upholding integrity and fair play (86.7%) and problem solving skills (81.3%). When asked about the weakest skills or the skills that are in need of improvement, managing conflict (41.67%), customer service skills (33.33%) and information / communication technology (ICT) skills (33.33%) are the skills which need extra attention in the occupation of sport officials. Almost two-thirds of the Dutch sport organisations have the same expectations of voluntary and paid sport officials (64.29%).

5) Senior management staff

In the Dutch results, 70% of the sport organisations declared that they employ senior management staff. For this occupation, the most important skills according to Dutch sport organisation are strategic thinking, leadership skills (both 100%), verbal communication skills, decision-making skills both (97%) and motivational skills (93.9%). Almost two-thirds of the Dutch sport organisations do not have the same expectations of paid and voluntary senior management. Skills that are weak or in need of improvement for senior management staff are leading change (40%) and information / communication technology (ICT) skills (20%). Whereas leadership skills are regarded as the most important, 24% of the participants declared that leadership skills also are in need of improvement for senior management staff.

6) Middle management staff

In the Dutch results, 80% of the participants declared that they employ middle management staff. For this occupation, according to Dutch sport organisations, the most important skills and attributes are team working skills, verbal communication skills (both 95.8%) and organisational and planning skills (91.3%). The weakest skills (or in need of improvement) of middle management staff are leadership skills (47.37%), leading change and marketing and sales skills (both 31.58%). Over half of the Dutch sport organisations have the same expectations of paid and voluntary middle management staff (58.33%).

7) Operational staff

In the Dutch results, only 38.3% of the sport organisations employ operational staff. For this occupation, the most essential skills and attributes are team working skills (78.6%), technical skills and knowledge required for the specific role (71.4%) and customer service skills (64.3%). Exactly half of the Dutch sport organisations do (or do not) have the same expectations of voluntary and paid operational staff. When asked for the

weakest skills or the skills which are in need of improvement, information / communications technology skills (25%) are the skills which are the weakest or in need of improvement for operational staff positions.

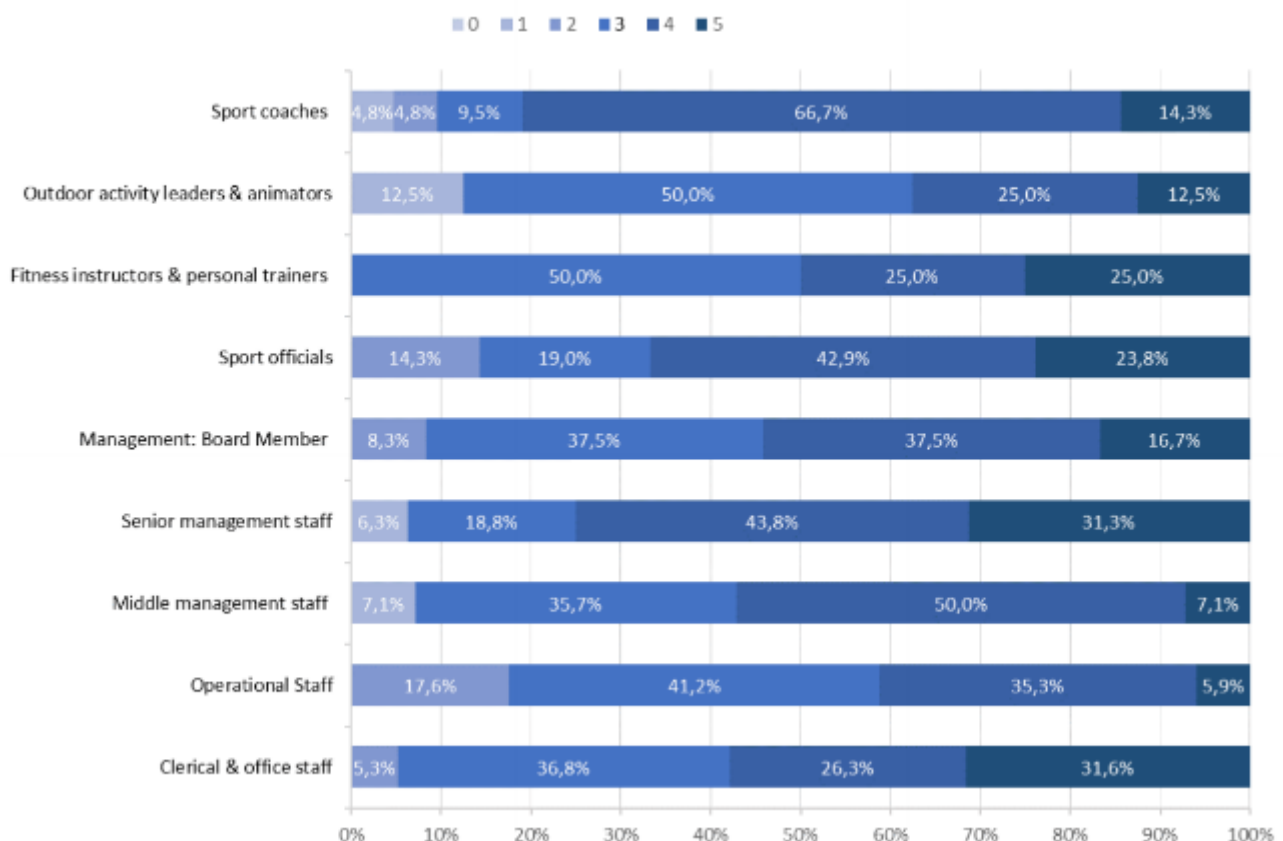
8) Clerical and office staff

In Dutch results, 61.7% of the Dutch sport organisations employ clerical and office staff. In the opinion of the sport organisations, administration skills are regarded as the most essential skills for this occupation (100%). Customer service skills (89.7%) and team working skills (85.7%) are also regarded as essential skills for clerical and office staff. When asked about the weakest skills or the skills which are in need of improvement, use of technology, equipment and tools, communication, problem-solving and information / communication technology (ICT) skills are regarded as the weakest skills of clerical and office staff (all 29.41%). Over half of the sport organisations in The Netherlands have the same expectations of voluntary and paid clerical and office staff.

9) Volunteers

In the Dutch results, when asked to rate the skills of the different occupations on a scale of 1 to 5, the Dutch sport organisations rated the skills of their volunteers as:

How would you rate the skills of your VOLUNTEERS in relation to what is required to perform their roles?



c) Recruitment of paid staff and volunteers

In the last twelve months, 62.22% of the participants recruited or attempted to recruit paid employees. They tried to recruit middle management staff (66.7%), sport coaches (63%) and clerical and office staff (40.7%). When asked if the participants had vacancies which are difficult to fill, only 15.56% of the organisations declared that they indeed had difficulties to fill these vacancies. These difficulties are specifically for middle management staff (66.7%), sport coaches (50%), senior management and clerical and office staff (both 33.3%). The main causes of difficulty in recruiting staff are low numbers of applicants with the required skills (44.44%), unattractive terms and conditions offered for the position (33.33%), and a lack of work experience or qualifications expected by the organisation (both 22.22%). At the moment of research, only 24.44% of the organisations have staff vacancies. These vacancies are in middle management (60%), clerical and office staff (30%) and senior management staff (20%).

Two-thirds of the participants declared that they do not have difficulties in retaining their staff (66.67%). For the organisations that do have difficulties in keeping their staff, middle management (60%), senior management and clerical and office staff (both 40%) are the most troubled occupations. The main reasons for these difficulties are geographical locations (e.g. poor transport), a lack of job satisfaction and the inability to meet the skill requirements for the job (all 50%). Over 40 percent of the participants declared that they have difficulties in engaging volunteers (42.22%). The most difficult voluntary positions to fill are management (board member) positions (68.42%), sport officials and operational staff (both 52.63%).

d) Key issues in working in sport en physical activity

According to the Dutch participants, sport organisations have become more professional in recent years (72.72%). The sport and activity sector is evolving, and as a result the skills needed by those working in the sector will change too (90.91%). The improvement of governance in Dutch sport organisations should be a priority (84.09%). 79.54% of the participants state that the skills required to work in their organisation also are changing. Besides the change in the sport sector itself, the expectations of the Dutch national government are also increasing (75%), and even leading to change in the organisations itself (63.64%). Despite of these changes, the people working in the participating organisations are willing to train and develop themselves (79.55%). This is mandatory, as 79.54% declares that in the future there will be a demand for a better qualified workforce. It is important that the workforce has access to on-going training to keep their skills up to date (93.18%) and universities / training providers should work more closely with organisations to facilitate this training / education (77.28%). From the participating organisations, 81.72% regularly reviews the skills and training needs of their staff. Main barriers for arranging training are lack of funding available for training (45.24%), the high cost of training (38.1%) and a lack of time available for employees to undertake training.



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8

REPORT ON NATIONAL CONSULTATIONS

8. REPORT ON NATIONAL CONSULTATIONS

All the outcomes of the desk research and the employer survey were discussed with various stakeholders from different Dutch sport organisations. The aim of discussing these outcomes with the different stakeholders was to get a confirmation of the outcomes and possibly new and broader perspectives on the outcomes.

a) Stakeholder consultations

A lot of stakeholders were interested in the outcomes of the survey and the research project. The opportunity was provided to stakeholders to meet up and discuss these outcomes. The results of the outcomes are implemented into the National Action Plan in the next chapter. Two different stakeholder consultations were held. The first of these consultations was a group discussion with four different stakeholders. Secondly, individual conversations were held with stakeholders who wanted to participate in the stakeholder meeting, but could not make it. An overview of stakeholders and the activity which they participated in is displayed below. The overall feedback from the participants was very positive. According to the participants, *'we already know a lot, but the comparison with other countries is very interesting'* (participant). More detailed feedback, remarks and items which were discussed are presented below.

Stakeholder	Activity	Function
Royal Dutch Football Association	Individual conversation	HRM manager
National Olympic Committee	Individual conversation	HRM manager
Water sports association	Individual conversation	HRM adviser
National Olympic Committee	Group discussion	Elite sports employee
Royal Dutch Football Association	Group discussion	Employee Woman's football
Disabled sports association	Group discussion	Employee blind football
Royal Dutch Hockey federation	Group discussion	Employee competition

b) Individual conversations

The individual conversations were held with some of the same people who completed the survey. We specifically targeted this group of people, so they already had some knowledge on the topics of the survey. Before the conversations took place, the report containing the main findings and graphs were shared with the stakeholders. The stakeholders were asked to read through the report and highlight the different subjects which they thought were interesting and wanted to discuss. Based on the topics highlighted by the stakeholders and the results presented in chapter seven, the outcomes of the research and survey were discussed. A list of topics discussed in the conversation is shown below.

Topics discussed in the individual conversations

Different types of sport organisations in The Netherlands	Outcomes of the different occupations
Employment in Dutch sport organisations	Volunteers
Uniqueness of the Dutch sport structure	Recruitment and retaining staff
Key issues	Development and training

c) Group discussions

The group conversations were held with people who had not completed the survey. We specifically targeted this group of people, so they did not have knowledge on the topics of the survey and the questions asked. Therefore, their perspective was essential to create knowledge on the same topics, without prior cognition. During the group discussions, different outcomes of the employer survey were presented and discussed with the different participants. Because the structure of the presentation was similar to the structure of the survey, a lot of the same subjects were discussed. A brief list of this topic can be found below.

Topics discussed in the group conversations

Different types of sport organisations in The Netherlands	Outcomes of the different occupations
Employment in Dutch sport organisations	Volunteers
Uniqueness of the Dutch sport structure	Recruitment and retaining staff
Key issues	Development and training
Other key issues or subjects according to the participants	

d) Overall feedback

1) Different types of sport organisations in The Netherlands

The overall feedback from all of the participants of the national consultations on the different types of Dutch sport organisations was very positive. In comparison to the rest of Europe, the Dutch sporting landscape is very well organised. With all the different sport federations representing even the smallest types of sports and with the different supporting organisations as knowledge centres, regional and local sport organisations, almost every aspect of sport is well represented and organised. However, the differences in these organisations also must be recognized. There is a big difference in sport federations, mainly based on the size of the organisation and the amount of resource they can use. For example, the Royal Dutch Football organisation (KNVB) employs over 100 individuals and has around 1.2 million members; whereas the Dutch Floorball and Unihockey Federation (NeFUB) consists of only one employee. The amounts of resources therefore are also very scattered over the different organisations, where big organisations have large amounts of resources (employees, money, political power etc.) and small organisations have few(er).

2) Employment in Dutch sport organisations

Employment in Dutch sport organisations is a rather peculiar thing. In The Netherlands, there is general idea that working in sports is 'sexy'. It has something of status or honour. In comparison to other (commercial) sectors, wages are relatively low in the Dutch sport sector. As a result, a lot of young professionals are leaving the sport sector after a few years. Especially smaller sport organisations therefore experience a lot of turnover in staff. As discussed before and will be mentioned in the next paragraph, Dutch sport runs on a big amount on volunteers. Therefore the notion must be made that employment in sport does not fully represent the whole sport sector in The Netherlands. All participants did agree with the survey outcome that it is not hard to fill vacancies or find the right (qualified) people if they have a vacancy. The exceptions to this outcome are specified vacancies as financial specialists.

3) Uniqueness of the Dutch sport structure

The uniqueness of the Dutch sporting landscape is an essential part. The entire organised sport in The Netherlands is based on volunteerism. With over a million active volunteers a week, it is by far the biggest voluntary contribution and one of the most essential aspects of Dutch sport. Because it concerns volunteers, it also brings challenges. One of them being questioned in the employer survey, does an organisation have the same expectations of volunteers as they have of paid staff? This will be discussed further in the volunteers section. As far as the participants knew about the organisation of sport in other countries, the integrated organisation of Dutch sport is also a distinctive aspect. With every sport having its own federation, supported by different national, regional and local organisations, there are a lot of opportunities and knowledge available. The notion must be made here that this structure also can result in a loss of knowledge and momentum through the integration of networks and federations, like seen in bureaucratic systems.

e) Outcomes of the different occupations

1) Sport coach

All participants agreed that a sport coach is an essential role to provide sport in The Netherlands. Whereas half of the organisations stated that they employ sport coaches, it was estimated that at least 90% of sport organisations have the availability of sport coaches. Most of these sport coaches are active on a voluntary basis. The sport coaches who are employed by sport organisations, most likely are employed in top occupations in highly placed or national teams. The key skills for a sport coaches were team work, knowledge on the specific sport and performance evaluating and feedback. Whereas the first two skills apply for all sport coaches, the latter skill is mainly required for coaches who are active on performance teams.

2) Outdoor activity leader and animator

The occupation or outdoor activity leader and animator was a somewhat difficult to answer by the participants. This can be explained by the fact that the outdoor sector is relatively young and therefore is still developing. A lot of outdoor activities are also located on foreign soil, like the Ardennes forests in Belgium. In the individual conversations, participants could not really tell anything about this occupation because they were unfamiliar with it. They did however agree with the outcomes of the survey and could imagine that these results would match the reality. In the group discussion, only one of the participants had some

experience with the outdoor occupation. Nevertheless all participants could only guess and agree with the outcomes of the survey.

3) Fitness instructor and personal trainer

Almost 80% of the sport organisations do not employ fitness instructors or personal trainers. This can be explained by the fact that the fitness and personal training industry is a sector on its own in The Netherlands. Fitness centres and personal training are mainly operated by commercial organisations. Since the rapid development of the fitness industry in the last few years, it could pose a threat to the traditional Dutch sport system. More and more recreational athletes are dropping out of a traditional membership and are moving to fitness. This tendency started some years ago and is still (slowly) growing. According to the participants in both consultations, this movement is forcing sport federations and organisations to create new, challenging forms of sports to sustain the membership numbers.

4) Sport officials

Almost 70% of the sport organisations stated that they do not employ sport officials. This can be explained by the voluntary sport culture in The Netherlands. In professional sports and highly placed amateur sports, the officials are employed by sport federations. In amateur sports, most of the sport officials are volunteers. Therefore it could be explained that almost two-thirds of the organisations do have the same expectations of volunteers as they do of paid employees.

5) Staff (Management, operational, clerical and office)

For management staff, 70% (senior) and 80% (middle) stated that they employ people in this occupation. It was assumed by the participants of the consultations that the other 30% and 20% were organisations which are operated by volunteers. It was clear for the participants that sport organisations of any kind need management staff to function properly. Only 38% of the Dutch sport organisations employ operational staff. It was assumed by the participants that the reason for this relatively low percentage is the voluntary contribution in facilitating and operation sport in The Netherlands. Most of the Dutch sport clubs are operated by volunteers. As for clerical and office staff, 62% of the Dutch sport organisations employ people in this occupation. The most essential skill for this position is, according to the survey outcomes, administration skills. Based on the knowledge of the participants, they stated that most of the people working in this occupation are functioning as a back office for the sport organisations. The notion must be made here that most of the respondents of the survey were sport federations which actually have an office. Due to a shortage of responses of sport clubs, it is unclear if this result could be generalized to the entire Dutch sport sector.

6) Volunteers

As mentioned multiple times in this report, volunteers play a crucial part in the Dutch sport sector. With over a million active volunteers every week, the sport sector could not exist in its current form without them. This integrated approach of volunteering and sport, could explain why organisations do have the same expectations of volunteers in comparison to paid staff. Quite frankly, volunteers are doing the same work as paid staff in a lot of organisations and clubs. When asked to rate the skills of volunteers in relation to what is required to perform their role, almost everyone agreed that volunteers perform rather well. This could be explained by the organisation of sport in The Netherlands, where volunteers are the foundation in delivering

sport. According to one of the participants, the passion from volunteers to work in sports is remarkable. There is no other sector in which there is such a high level of skill and commitment than in sport. This commitment is not only remarkable, but is also very precious and cannot be taken for granted. The participants did realise this and acknowledged this fact.

7) Recruitment and retaining staff

The recruitment and retaining staff and volunteers was broadly discussed in both forms of consultation. Regarding the volunteers, the fact was acknowledged that their commitment is precious and should not be taken for granted. Nevertheless, 43% of the sport organisations indicate that they have difficulties in engaging volunteers. One of the reasons is that for a lot of volunteers, their contribution is a hobby for them. They want to invest their time and effort, but only if they can enjoy what they do. Secondly, a lot of the volunteers are older or retired people. It is harder for this kind of people to adjust their volunteering to the changes that affect sport organisations. For instance, if a sport event is moving from one venue to another due to the growing participation, it does not automatically mean that volunteers can move accordingly. A lot of volunteers are bound to a specific time and location. Especially with events (which can fluctuate in time, attention and number of participants), one tiny shift can have a huge impact on the commitment and availability of volunteers. For big organisations, like federations, it is not hard to engage volunteers. According to the participants of the consultation, the name and status of an organisation helps in engaging these volunteers. For instance, the Royal Dutch Football Association (KNVB) and the National Olympic Committee (NOC*NSF) are very popular among volunteers. It is not only a hobby for them, but also some sort of recognition or status. This is different in local sport clubs or events, where there is little status or less recognition. Even though the engaging of volunteers is an issue for many years, all of the participants agreed that the number and engagement of the volunteers in the Dutch sport sector is remarkable and admirable. Recruiting and retaining paid staff is less of an issue according to the employer survey and consultations. Only 16% of the sport organisation indicated that they have difficulties in recruiting people. Retaining people is slightly more problematic for the organisations. With a third of the organisations indicating that they have problems retaining staff due to unattractive terms and conditions (33.33%). As mentioned before, a lot of sport organisations lose their staff due to the low wages in comparison to other sectors. Especially young professionals, who start their career in sports, move to other sectors after a few years to earn more money.

8) Development and training

There is a proficient supply of training and education in The Netherlands. As presented in the chapter on training and education, the education in sports is widely distributed on subjects, levels and geographical locations throughout The Netherlands. Even though this supply of education and training is well organized, it is not mandatory to have an education in sports to work in the sport sector. A lot of sport organisations (federations and clubs) are working on voluntary or project basis. Therefore, with the right attitude and character it is possible to work in sport. Therefore one of the most essential skills required for working in sport in The Netherlands is project management. Even though this skill is widely taught in higher education, in reality this skill is widely perceived as inadequate. There is a vast demand for project management, especially with the realization of a national agreement on sport. In the next two to five years, an immense number of projects will be developed and implemented in sport or in other sectors related to sport.

9) Other key issues or subjects according to the participants

According to the participants of the consultations there is a lack of corporate culture in Dutch sports. The fact that sport in The Netherlands is seen as 'sexy' and is socially desirable creates an environment of solidarity. This results in a lack of focus and effectiveness in sport organisations. In regards to funding, there is a culture of so called 'jars'. For every project or initiative there is a 'jar of money'. This jar is specially created for a project, initiative or goal. Then every project or initiative which contributes to reaching the goal can get money out of this jar. As an effect of this distribution, jars of money in sports usually are empty before the goal is reached. Instead of critically reviewing the expenses and financial process in relation to the goal, another jar of money is created for similar goals or projects. This system in relation to the solidarity in the Dutch sport system stands opposite to commercial or corporate organisations in which every euro counts. From the outside of the Dutch sport sector, this financial structure seems odd, and even in the sport sector questions are being asked. This poses a threat to the sustainability of projects and organisations.



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9

**NATIONAL
CONCLUSIONS**

9. NATIONAL CONCLUSIONS

a) Survey

According to the results of the survey, 72% of the Dutch sport organisations declare that sport organisations have become more professional over recent years. This demand of professionalism of sport organisations also demands something from the sport organisations and the people who work in these organisations. One of the results of this evolution is that the skills needed by people working in sport organisations will change over time too. To facilitate this change, universities and other suppliers of training should collaborate more with sport organisations. But then again, sport organisations face a challenge in this as there is a lack of funding for this training. And even when there is funding, a third of the organisations state that the employees don't have enough time to undertake training, education or other forms of development.

Almost all of the participants state that the governance of sport organisations should be improved and that it should be a priority. Not only has the demand for professionalism an impact on sport organisations, but also the increasing expectations from the national government impact these organisations. Over 60% of the organisations claim that these increasing expectations even lead to change in the organisations. The governance of the Dutch sport organisations should be a priority and should be watched carefully.

The Dutch sport landscape thrives on volunteers. This structure provides huge support and solidarity for the sector. But with this structure, challenges also arise. In different roles, organisations have different expectations of volunteers than they have of paid staff. In other roles, the expectations are the same and volunteers are expected to perform as if they are paid. This is one of the reasons why over 40% of the organisations have difficulties in engaging and retaining volunteers. Because the impact of these voluntary workers is so big on the Dutch sport sector, it is a key issue which all sport organisations face.

b) Participants

In the last five years, the number of people which actively participate in sports has increased from over 8 million in 2013 to slightly over 10 million in 2018; an increase from 56% to 65% of the Dutch population. Despite this growth in active sport participants, the number of memberships decreased. Since 2013, the percentage of memberships diminished from 32% to 30% in 2018. Even though this seems like a small percentage, this number is the equivalent of 223.000 memberships. These decreasing numbers result in lower incomes for the sport organisations and –federations. So frequently heard problem therefore is that the organisations have to do the same work, with less income. This corresponds with the number of people who are actively taking part in some form of sport outside the traditional sport clubs. This number increased from 56% to 65%. The number of participants in sports is over twice as high as the number of members of sport organisations. This means that the share of so called 'organized sport' is now less than half of the total sport sector and there has less influence on Dutch sports. When put in perspective, the growing expectations of national government in relation to the decreasing influence of sport organisations causes some friction in policy making, organisation of sports and realizing these expectations of the government.

The top 5 of most popular sports are all individual sports (fitness, walking, swimming, running and cycling). With the decrease of influence of sport organisations, the growing expectations from the national government and the growing number of individual participants in sport, the Dutch sport sector faces some issues. The decreasing number of memberships puts sport organisation in a tough position, as they have to do the same amount of work with less income. With the Dutch national Sports Agreement, the national government also has increasing expectations of the Dutch sport sector, but less influence. Therefore the government and the sport sector face the challenge on how they can accomplish these expectations.

Overall the Dutch sport organisations face some challenges in the near future. Some challenges are different per organisation, but almost all of the organisations face the same main challenge. The decreasing number of memberships in relation to the growing expectations from governments and their own members puts sport organisations in a tough spot. Every organisation is facing these challenges, but there is not much cooperation between the organisations to tackle this challenge. But despite the challenges and difficulties that sport organisations encounter, there are a lot of beautiful features that characterize the Dutch sporting landscape. The societal support and engagement for this relatively small sector is enormous. While only being accountable for 1% of the total Dutch economy, sport reaches over 10 million people each week (65%). Working in sports is popular in The Netherlands, with a low number of vacancies and relatively no problems in filling these positions. In comparison to other sectors, a lot of people are even prepared to earn less for the same position because they want to work in the sport sector. It says something about the commitment, the importance and the beauty of the small sport sector in The Netherlands. Just as other sectors, it faces its challenges and encounters difficulties. Nevertheless, the sector is well organized, is extremely resilient and has an enormous societal impact.

Overall, throughout recent years sport has been growing in The Netherlands, with increasing numbers of people working in the sport sector. Simultaneously the numbers of people working in sport occupations are also increasing. Even though there are slight differences between males and females working in sport, overall the gender numbers are equal. There is a slight difference in job supply, whereas employers primarily offer part time contract and employees desire full time jobs. This is also acknowledged in the statistics provided in this report. The statistics and findings as presented in this report offer insights in employment data of the sport and activity sector in The Netherlands. These insights could be the incentive for future research in Dutch and European employment data collection.



ESSA-SPORT
Improving the Supply of Skills to the Sector

10 NATIONAL ACTION PLAN AND RECOMMENDATIONS



10. NATIONAL ACTION PLAN AND RECOMMENDATIONS

a) Thematic 1: Job supply

The part-time job supply does not match with the demand of employees. Most of the employees desire a full-time appointment. Therefore the recommendation is made to create a culture of collaboration where a part-timer can perform the same part-time job within two different organisations.

Recommendation	Priority Action	Actors	Timeline	Measure of success
Establish a culture of collaboration between sport organisations	Create platform for demand and supply	NOC*NSF	2 years to launch	Launch and use of the job supply
	Coordinate distribution of the platform	NOC*NSF	Pending on the lifetime of the platform	Platform still working
	Financial support	(Members of) NOC*NSF Commercial participation possible	1-2 years, NOC*NSF pays in advance during preparation	Self-sustaining platform

b) Thematic 2: Financial renewal

The jar-culture of all the different jars of money segregates instead of stimulating cooperation. Therefore the recommendation is made to investigate a new model for the financial distribution of public money among sport organisations.

Recommendation	Priority Action	Actors	Timeline	Measure of success
Create a new fund which distributes the financial means for basic work in sport organisations. <i>'Basic work' means the minimum amount of work that is needed to sustain to federation and its responsibilities.</i>	Establish fund, including board and members	Ministry of Health, Welfare and Sports	5 years	New distribution of funding
	Establish guidelines for "basic work" and specialist work	Ministry of HW&S together with sport federations and NOC*NSF	5 years	Code of conduct
	Establish support of sport federations for the new distribution	All the participating federations and other sport organizations that profit from these newly distributed funds.	5 years	Increased cooperation between sport federations and the NOC.

c) Thematic 3: Mobility of employees

To stimulate innovation and development in employees it is important that they have future perspectives. At this moment, the opportunity to make a change between jobs is limited. Therefore a HRM-performance cycle must be created and implemented. In this cycle there is extra care and attention for the needs and vision of employees in regard to their own personal development. By providing employees more power over their own development, they can develop themselves in a manner that they see fit for the future.

Recommendation	Priority Action	Actors	Timeline	Measure of success
Establish HRM-performance cycle	Educate qualified managers	WOS and external qualified organisations	2 years	Graduation of the programmes
	Qualified training providers	External specialized organisations	1 years	Signed contracts and specialist education programmes
	Establish support	WOS and Social partners	2 year	Enough demand for the educational programme
	Evaluating new HRM performance cycle	WOS & Mulier Institute	2-4 years	Significant more turnover for employees into different (higher) positions or organisations

d) Thematic 4: Future research and development

In order to keep the knowledge and vision, further research must be conducted into the collection of employment data and skills. In a dynamic and small sport sector, knowledge is essential get ahead of societal and sectoral change. Therefore the recommendation is made to continue further research and data collection.

Recommendation	Priority Action	Actors	Timeline	Measure of success
Continue research and data collection on employment in the Dutch and European sport sector.	Establish partnerships based on research and knowledge gathering	EOSE Dutch Knowledge centres Dutch branch organisations	2-5 years	Structural / periodical research reports on employment on Dutch and European level



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