Foreword by Alberto Madella (EOSE President)

EOSE is extremely proud to present the results of the intense work of the Euroseen Project Group. This report fully matches the expectations to produce sound and reliable knowledge on the current development of the Tennis Sector in the European Union. This will hopefully result in a decisive support to the production of a Workforce Development Plan for the sector, that is a fundamental tool for national and international organizations to accompany further growth.

This report is another example of research excellence achieved through the constant networking activities that EOSE has been animating since its inception in 1997. EOSE welcomes especially the enlargement of this network, through the co-operation of numerous national and international partners, including the International Tennis Federation, thus providing an exemplary model of relations with the sector.

Foreword by ITF

The International Tennis Federation is very pleased with our co-operation with EOSE. The research presented in these pages provides extremely valuable information in the development of the Tennis Sector at European level.
The methodological and conceptual approach of this study on the workforce development plan for the European Tennis Sector is based on multiple investigation techniques, which include both qualitative and quantitative approaches. The research, by involving all the organisations related to the tennis industry, helps to build reliable knowledge capable of understanding the increasingly complexity of the tennis sector in Europe and the wide range of factors that influence it.
We would like to take this opportunity to thank EOSE for having chosen tennis as their subject of study. We are sure that the results provided in this research will be of great benefit to the tennis community.

Miguel Crespo, PhD. / Development Research Officer / International Tennis Federation

The Euroseen Working Group is representative of the following organisations:

Deutsche Sporthochschule Koln Richard Keiner / Germany	OSSERVATORI ITALIANI SULLO SPORT E L'OCCUPAZIONE (OISO) Corrado Beccarini / Italy
European Association of Sports Employers (EASE) Marie Leroux / France	PREVISTA Ltd Julie Khan/Gina Placey United Kingdom
European Health and Fitness Association - EHFA Leo Clijsen / Belgium	Réseau Universitaire d'Observation et de Prospective de l'Emploi Sportif (RUNOPES) Pascal Bauger / France
European Network Sports Science Education and Employment - ENSSEE Alberto Madella / France	SkillsActive Muriel Bankhead United Kingdom
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The report was compiled by the OlSO (Osservatori Italiani sullo Sport e Occupazione).

Introduction

The following report is the result of extensive research activities carried out in four countries (France, Germany, Italy and United Kingdom), on the basis of a common methodological and conceptual approach.

This research constitutes a fundamental part of the Euroseen Leonardo Da Vinci Project conducted by the European Observatoire for Sport, Education and Employment Network (UK/03/B/F/NT-162_018). The research is based on multiple investigation techniques, that embrace both qualitative and quantitative approaches, with the objective of integrating the different kinds of data and interpretations. To this purpose, different actors of the tennis industry have been involved in the research process to build reliable knowledge, capable to grasp the complexity of the sector and the wide range of factors that influence it. The sampling procedures used for three of the four countries (France, Germany and Italy) allow a high level of comparability. The sample selected for United Kingdom had slightly different characteristics, as it included a significant number multi-sport operators where tennis related services are just one of the multiple services offered. More than 30% of UK operators provide opportunities for practice in 20 more sports beside tennis and this limits in some cases the possibility of full cross-national comparison.

This report has been possible exclusively though the great investment of time made by the national correspondents of the Euroseen Project in the four selected countries and also thanks to the preliminary methodological work of the whole Project Group in order to develop a suitable conceptual background and effective operational procedures. The co-operation of National Organisation (e.g. Federations) has been also essential for the success of the study.

The Characteristics of the Sector: Overview of the tennis industry

General Information: The tennis sector may be described as the whole range of establishments engaged in operating facilities and delivering primarily opportunities for tennis practice, mostly but not exclusively, on a membership basis.

The main activity of the sector is therefore the provision of tennis related services to clients, that are characterised by a wide diversity of features (for example, in terms of age, goals, level of skills, frequency of practice, etc.). Tennis organisations usually provide:

- *Technical instruction services to participants with different levels of skills;*
- *Opportunities for competitive and recreational matches;*
- *Training sessions and plans for athletes and associated services;*

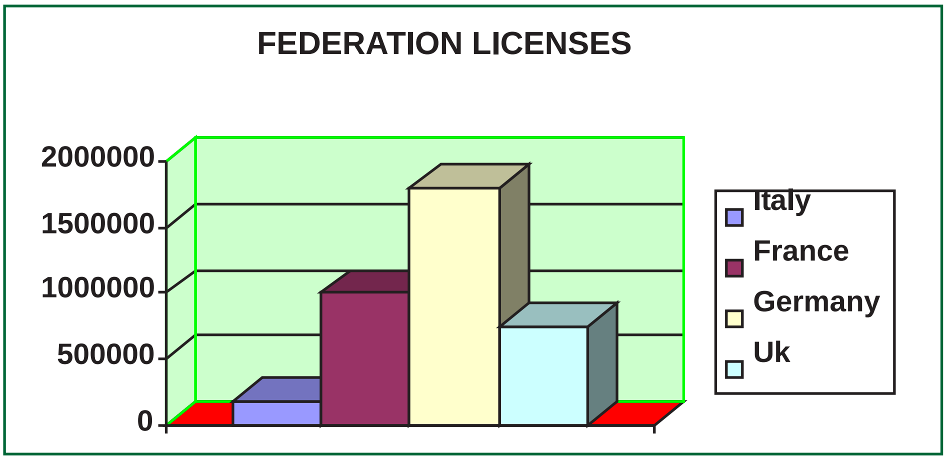
Instruction and training services can be provided on the basis of large collective or small groups classes, one-to-one practice, personalised training in the perspective of competition. In addition to the tennis core services, other kind services relating to fitness, physical preparation, nutrition, well-being, eating, childcare can be provided by these operators.

To these purposes, tennis establishments manage a variable set of facilities that - beside the core basis of tennis courts - include very often other kinds of installations, suitable for other sports, or fitness and health services (i.e. swimming pools, gyms, weight rooms, wellness centres, etc.).

The characteristics of tennis organisations differ significantly across Europe but also within a single country. In particular, the relevance of the services supporting the short or long-term preparation to competition can vary significantly, from being the main product of an organisation to almost non existence. The degree of variability and integration of the additional services and the “centrality” of the traditional tennis products are also significantly different in the various countries and contexts that have been investigated.

Tennis is certainly one of the largest sub-sectors of the whole European sport industry and certainly one of those with the strongest tradition, diffusion and visibility. Nevertheless, membership penetration of tennis in the various national sport systems can also be extremely variable. While it is not possible to provide a reliable figure for tennis participation at a Pan-European level, the available data on the national markets studied confirm both tennis popularity and national variability. In Italy, tennis is practiced by 1.3 million of citizens (2.3% of the total population). This amounts to 8.1% of the total sport population (source ISTAT 2000). Members of the Italian Federation are 175,000 (FIT 2004). Official data report 3.6 millions of players in France, that is 5.9% of the total national population (source MJS/INSEP 2000). One million of French players hold a licence delivered by the National Federation. In Great Britain the 2002/2003 General Household Survey (sport module) report that 7% of the over 16 population practice tennis at least once in the year.

According to the MINTEL study carried out in 2000 750,000 club members can be estimated. In Germany, Veltins (2000) report that 7% of the 16-39 year old German population is involved in tennis and the members of the German Tennis Federation in 2003 were 1.8 millions.



Since tennis is usually practiced in an organised context, the level of organisational development corresponds to the significant weight of tennis in the national systems. In Italy more than 3,000 organisations provide tennis services (source CONI 2003), about 2,500 in the United Kingdom (MINTEL 2002), and more than 6,000 in France (Bayle 2004).

The life-cycle of the "tennis product" in Europe has been characterised by a quite classical development trend: after the "foundation" years, in the first half of the XXth century, tennis had a rapid growth and a wide diffusion in the majority of the European countries. Between the 60's and the 80's, the "maturity stage" was reached. In the last years of the 20th century in some countries this growth trend stopped and a stagnation or even a decrease in members became apparent in numerous traditional tennis countries, like Italy and France. At the same time new national markets were opening up and competition caused by new or non-traditional sport and fitness practices became stronger all over Europe. This trend occurred in spite of the popularity of the tennis stars and international events, like Wimbledon or Roland Garros. European athletes and coaches are still highly regarded and very often lead the world competitive ranking.

In spite of that, in the recent years, tennis has been often perceived as a quite traditional sport, both as a leisure and competitive activity, and in some countries it has been reported to be associated more to the adult or even aged people practice than to youth and children sport. New equipment, rules, methodologies and marketing practices have been consequently announced and implemented to reverse the trend and attract a larger share of the youth population, but the effect of these actions is still unclear and not well documented. Given this picture, the range of stakeholders relevant to this market (Figure 1) is unsurprisingly high.

The goal of the following sections of this report is to assess the main trends affecting the sector in the different countries, with special focus on the processes of professionalisation, specialisation and concentration and on the existing skills gaps and shortages in the workforce. On this basis, it will be attempted to identify the most significant consequences in terms of workforce development and related actions.

Organizations

Significant differences can be identified in the nature and setup of tennis organisations across the different countries. In Italy, France and Germany clubs are in most of the cases non for profit organizations (from 76% in Italy to 98% in France), with a minority of commercial business (15% in Italy). Their typical structure is based on volunteer managers with a low to medium number of paid employees. The situation of United Kingdom is substantially different: 25.4% of the organisations included in the sample were private non for profit (voluntary clubs; charities; etc.), 32% local authorities and 20% limited companies. Public sector organizations seem to attract the largest number of members in UK.

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The average membership size is very similar in Germany (200 members) and France (209 in France). The slightly higher number of members in Italy (340) is "inflated" by a small number of very large club. The value of the median for members Italy is in fact 102 members. An extremely larger membership characterise tennis operators in UK, where organisations with more than 1,000 members are the rule (75.4% of the total). This depends essentially on the distinctive sample composition, including numerous multi-sport service providers where tennis is present but not always is the key activity, differently from the other countries. This influences also the different membership form (annual, seasonal, pay per play).

Member size	France	Germany	Italy	UK
Less than 70	25.7%	22.7%	35.6%	7.9%
71 - 250	31.7%	60.9%	28.7%	10.5%
Over 250	41.6%	17.4%	29.7%	80.6%

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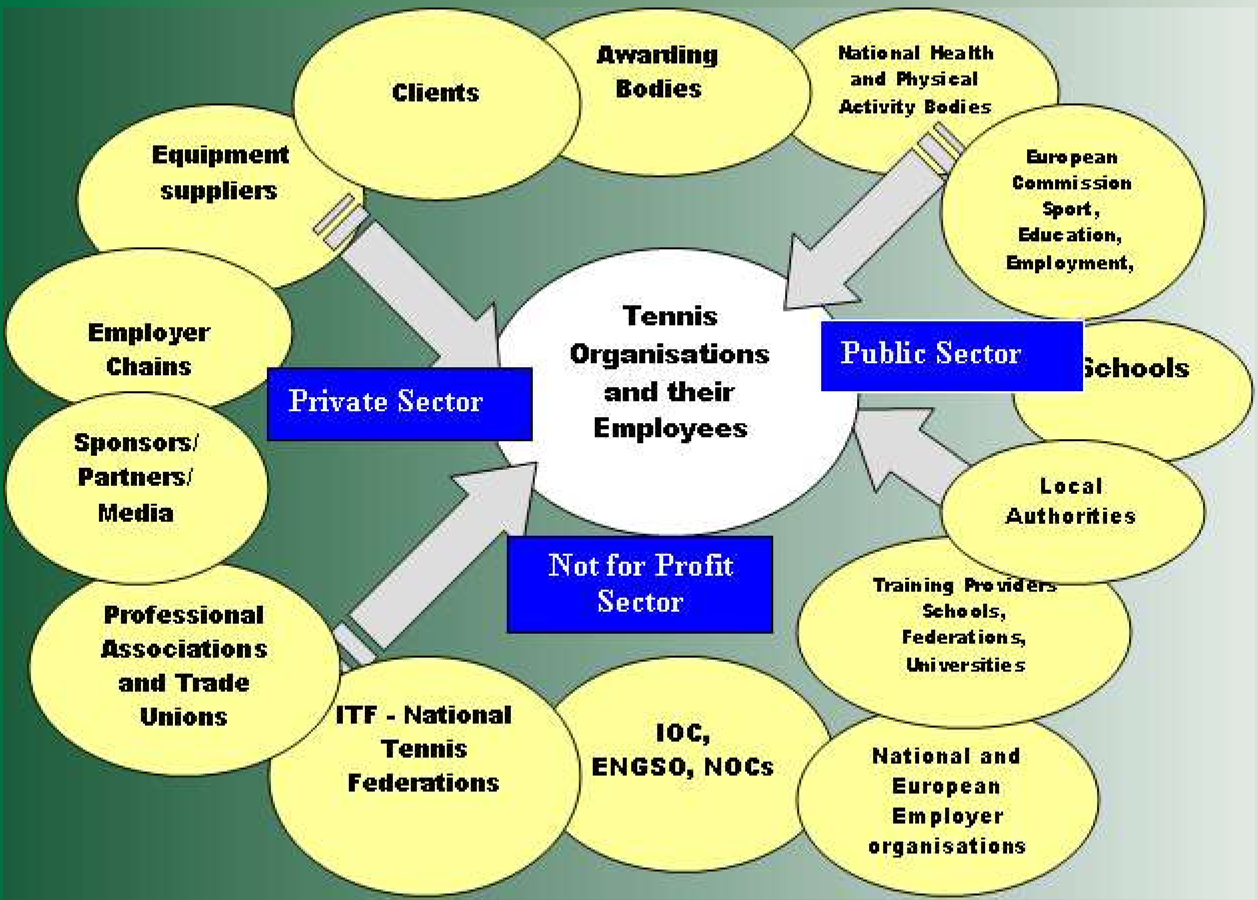
Youth are a generally a minority segment of clients in tennis clubs but with very different proportions ranging from 17% in Italy (29% if the University Tennis Clubs are considered), 25% in Germany and 43% in France. The exception here is again UK where the trend is reversed (45% of adults and 55% of youth members). Men are constantly the majority of the clients: they are 56% in Italy, 54% in the United Kingdom, 59% Germany, and 66% in France.

The nature of the membership also differs significantly across countries. While most of the members choose an annual membership (62% in Italy, and 92% in France) in the United Kingdom sample the majority of the clients prefer a seasonal membership (64.5%). 16,8% are annual members and the remaining 18% pay per any single use.

The size and the status of the organization is clearly one of the most relevant element to consider in the perspective of a Workforce Development Plan; small non profit operators are extremely different from large-scale organizations run by the public authorities but, at the same time from intermediate operators, acting on a pure commercial basis. These distinct actors should be considered with attention in order to focus the needs of the sector.

The Tennis Stakeholder Map



Range of Services

A wide range of services are usually offered to the different clients in almost all the tennis organisations. Only a very low number of clubs seems to target a single segment of clients or pursue an extreme specialisation strategy. Naturally the offer is strongly reflective of the club type. While private independent businesses - for example - focus mostly on adults, public operators run by local authorities pay greater attention to children, schools and special populations. In Germany, 2/3 of the organisations cater for leisure and promotional sportsmen (*Breitensport*) and about 40% provide services related to competition. The French situation is very similar: more than 80% of the operators target adult players (both leisure and competitive). A slightly lower number cater for young competitive (77.6%) or young leisure players (72%). Less developed are other kind of services, i.e. for schools or special populations.

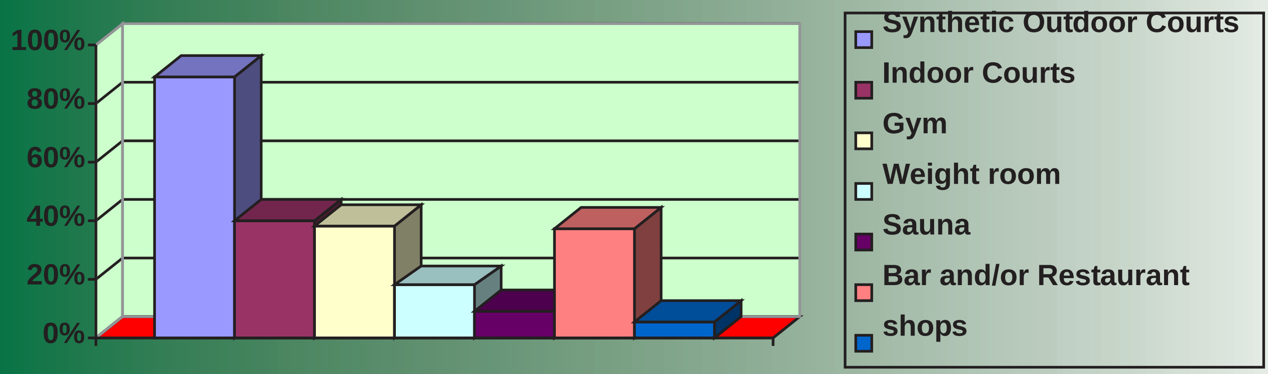
In Italy it can be noted a lower level of specialisation. A combination of services is offered to all the different categories of clients in the large majority of the clubs. Even so, services to recreational players are more frequent and prevail on competition oriented services, with the exception of some organizations (Tennis Academies) serving exclusively young and promising competitive players.

This poses the question of the strategic choice between the different package of services to be offered and their specific mix. Private sector operators tend to broaden their service *portfolio* to cater for larger sections of the leisure tennis market. Not-for-profit organisations tend to preserve a competitive identity but generally are moving towards broader lifespan approaches. A small niche pursue uniquely the strategy of competitive excellence, attracting clients from outside their local area (even foreigner) to support them in the difficult and demanding route of world excellence.

Facilities

The core facilities for the sector are obviously the tennis courts, but we can note some interesting trends across Europe in the articulation of core and supplementary range of facilities.

FACILITIES



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National specificities are worth of mentioning here. All Italian operators have synthetic courts and quite often indoor facilities (46%). 45% of the clubs have a gym, 31.7% a room for weight training, 31% a swimming pool, 19% a fitness studio, 8% a sauna and 62% a restaurant and a bar. In Germany 88% of the clubs have their own outdoor core base of courts and 29% have indoor facilities (18% privately owned and the rest rented). 12.9% of the clubs have a cafeteria, 5% a sauna, and 3.6% facilities for weight training. In France 87.8% have at least one outdoor synthetic tennis court (average number is 2,8), only 2,5% at least one grass court, 49% an indoor court, 24.3% a Gym, 5% a weight room, and very few have sauna, Jacuzzi and so on. In UK the range of additional service is reported to be higher but this probably depends on the more multi-sport nature of the surveyed centres. In fact UK operators provide by far the greatest range of ancillary facilities: 67.8% have gyms; 66% aerobic and dance studios; 55% a swimming pool; 51% have a bar and 27% a restaurant, 40% sauna and /or Jacuzzi, 27% climbing walls, 27.5% a running track, 10% a sport shop.

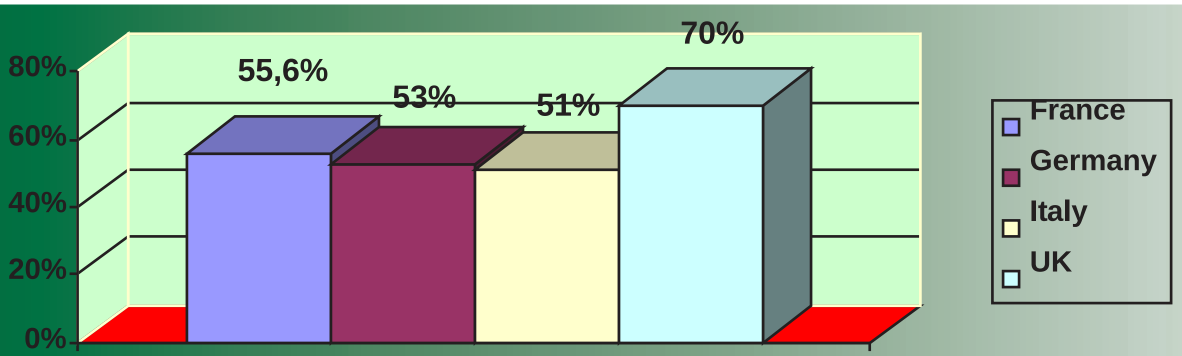
Other additional facilities and services offered include spa therapies, beauty treatments, sport shops, childcare areas, athletic tracks, meeting space / conference rooms.

Investments

Investments in infrastructure constitute a critical challenge for the operators who deliver tennis services. They are essential to keep the pace of the other competing sport sub-sectors and match the increasing demand of ancillary services from the clients. The inclination to invest and the nature of the investment planned are therefore important indicators of the perspective of development of the operators.

As expected, the biggest organisations are more inclined to invest and more optimistic about the future. It is then reasonable to hypothesise that this will further increase the gap between the larger and smaller operators. About 50% of investment is finalised to refurbishment; for the remaining part investment in tennis courts or specific facilities are generally lower than those made to create new spaces and facilities not directly related to tennis: extension or relocation of existing facilities; construction of swimming pools, sports halls, crèches, climbing walls, beauty farms and wellness equipment and redevelopment of green fields.

INVESTMENT



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Section 3

Occupations

The employment base of the tennis operators varies in relation to the country, the nature of the establishment and the size of their membership. However, except for UK, the homogeneity in the size of the employment is remarkable: in Italy the average employment base is 11.2 employees, 9.6 in Germany and 8.7 in France. Average employment size in UK is 105 employees. This depends essentially on the relation between with the size of the members, whose effect is recognisable also comparing different organizations in the same country: for example in Italy 64% of the largest organizations have more than 15 employees, while those with less than 70 members have less than 7 employees.

Also variable is the situation concerning voluntary and paid work: Germany and France are strongly characterised by voluntary workers and especially managers. In France 22% of the workers are paid professionals (81% of the coaches; 15% of the managers and administrative personnel) and 78% volunteers (47% of the coaches and 85% of the managers). In Germany 98% of managers and 40% of coaches are volunteers. In Italy volunteers workers amount to 43% (50.5% of the coaches and 35.5% of the managers) and paid work to 57.3%. The structure of occupation in UK is characterised by the prevailing role of the paid professionals: only 1% of the workers are volunteers and 44.7% of operators recruit only professionals. It must be noted however that the average absolute number of volunteers working in each individual UK organization is higher than for Italy and France. 54.2% of UK operators however recruit both paid and voluntary workers and then need for volunteers exceed 10 times the actual number of volunteers employed in UK. 35.7% of the volunteers actually have been recruited in the last 12 months.

As for the occupational functions, globally the most recurrent occupation types include instructors, coaches, expert of physical preparation, accountants, technical directors, general manager, other administrative personnel and maintenance personnel.

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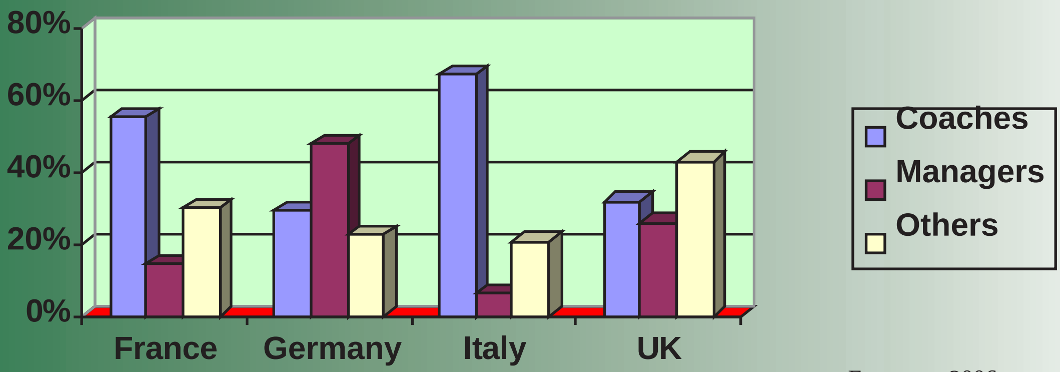
In France the set of technical occupation include specific figures like *Animateurs* and *Initiateurs* for whom a dedicated training is provided. For all these kind of professions there is a clear majority of men that are represented, with a ratio to women of 1:3 to 1:5. In Italy, the different categories of coaches and instructors account for 66.8% of the whole base of employees, managers (6%) and other support personnel (21%).

In Germany, coaches are 29.3%, managers 47.8% and the rest of support personnel amounts to 22.8%. In France coaches are 55% of the workforce, managers 15% and the rest of support personnel 30%. In UK, coaches and technical personnel amounts to 32%, managers (including supervisors, development officers and operational staff) are 26%, non managerial supporting staff (42%).

OCCUPATIONAL STRUCTURE



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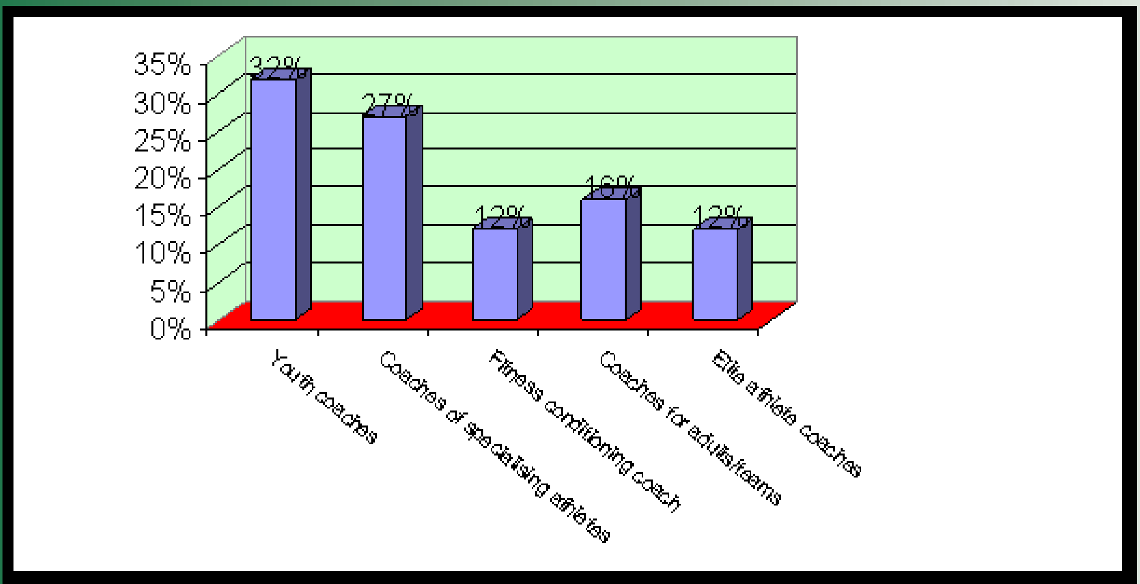

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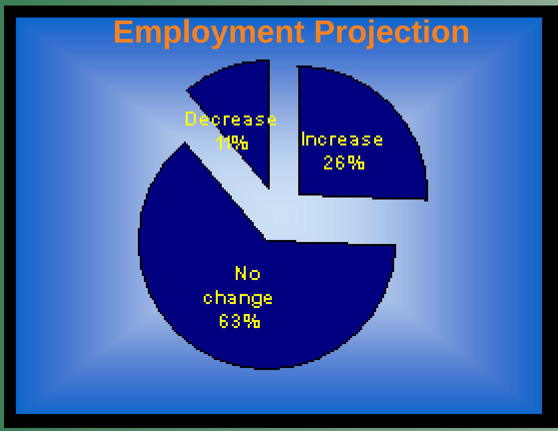
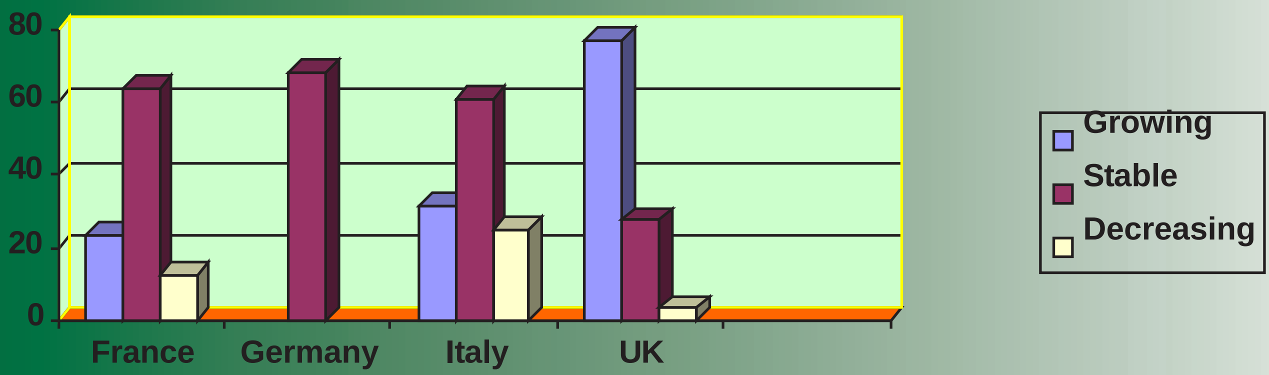
Part vs. full time jobs. Coaches are basically part time in Italy, France and Germany. The situation of the managers on the other hand is more variable: they are usually part time in Germany and France and full time in Italy, where - in addition – to that the majority of the managers are professionals.

Employment Trends

Employment in the sector is perceived to remain stable in the next future by the majority of the respondents in all countries except UK, where 10.3% of the respondents have hypothesised a significant increase and 56.9% a modest increase. Especially full time professional occupation is considered to remain stable (90% of opinions in Germany and 79% in Italy, 75% in France).



EMPLOYMENT TRENDS



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In addition to that, as it has been mentioned in the previous sections, new occupations are growing in the sector, such as health, fitness and wellness specialists, directors of communication, event managers and other new profiles. Also increase in global turnover in employment and entrepreneurial initiatives developed by coaches and instructors are perceived to be reflective of the new market trends.

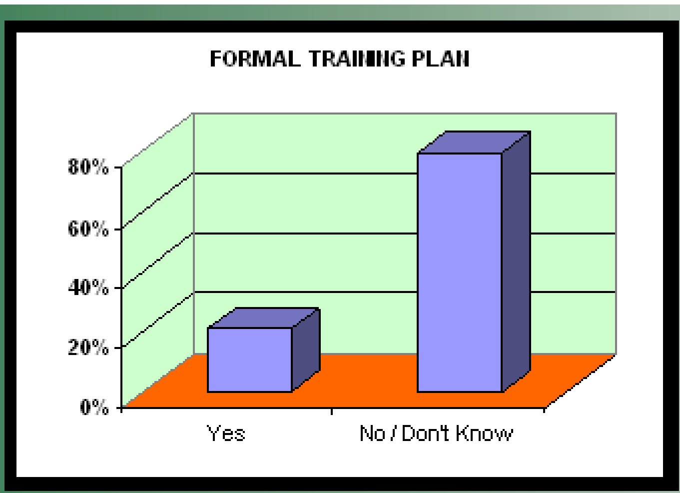
What is Driving Business and Staff Figures?

Consumer demand, trend in voluntarism, public sport policies, demographic trends and sport legislation changes are perceived in this order as the primary drivers for both changes in business (turnover) and staff. Health and school policies and technologies are not seen to be as significant staff drivers. Generally more than 50% of the operators indicate that consumer demand and market trends are the key drivers. National diversity can be noted especially concerning the importance of the current trends in voluntarism from a staff perspective. These trends are strongly emphasised in Germany (indicated by 77% of the interviewees) but are considered almost irrelevant in Italy (9%), probably due to the different culture and features of the organisations active in the sector.

Training & Education

Training & Personal Development Plan

Planning for training and personal development does not appear to be a priority for the majority of the organizations in the countries that have been analysed. Very few operators have a written training and personal development plan, with the exception of UK (where about 75% of the operator have written plans, especially the organisation run by local authorities with 98%). This reflects however more the current practice in UK sport organizations rather than the specific nature of the tennis sector in UK.



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Precise knowledge on the amount of money spent on training is rarely available. 88% of British operators have a specific training budget. In Germany Expenditure of training programs: 9.4% of clubs spend more than 5% of budget. In most cases employers expect that their budgets for training will stay more or less the same in the coming years. In Italy only 15% of the respondents think that they will increase the training related spending; 9.5% in Germany and 24% in France.

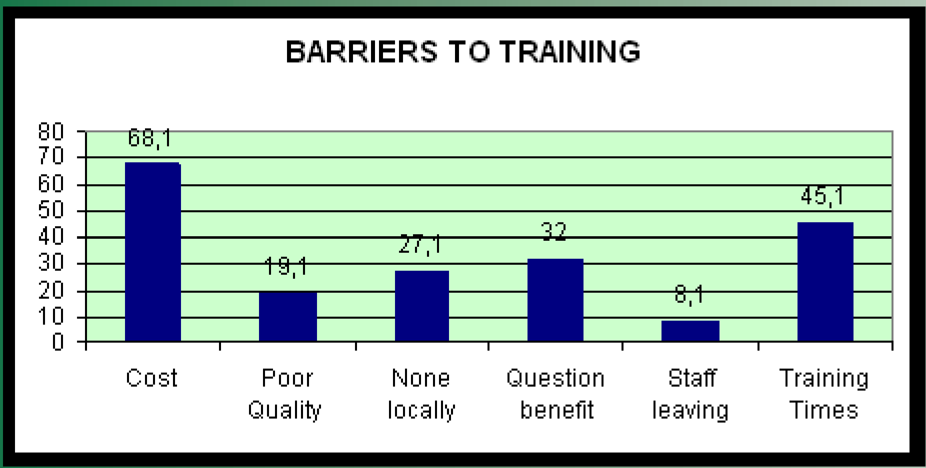
Barriers to Training

Continuing training opportunities are vital for ensuring that staff develops appropriate skills and motivation for their work throughout all the career stages. In most of the cases tennis operators are not in the position to provide in-house training for staff. This occurs essentially because of the lack of dedicated infrastructures and know–how, the small size of the staff and the high intensity of labour. Nevertheless, the provision of adapted training in an organised and systematic way is surely essential for the continued successful operation of tennis organizations. This is clearly a challenge for the traditional providers of tennis vocational training (such as the national federations or the legitimate training agencies). Numerous respondents have challenged the real match between usual educational contents and competences required in working life, especially for some professional figures.

The lack of systematic approaches to the provision of lifelong training for staff may limit significantly the development of the sector. The research shows that managers do not often value training and do not see clear benefits deriving from training to their organisations.

The major barriers for continuous training are usually identified in the costs of training and in the difficulty to make compatible the training and the working times, In any case, there as a substantial part of the operators who even question the real benefit of training for the 'real life job'.

Barriers to Training in Europe



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Barrier	France	Germany	Italy	UK
Cost	68.3	50.5	81,7	86,8
Poor Quality	24.1	7.1	19,4	22,6
None locally	17.8	31.9	46,4	24,5
Question benefit	46.2	15.5	28,7	13,2
Staff leaving	n/a	6.2	11,6	7,5
Training Times	36.4	48.2	55,6	58,5

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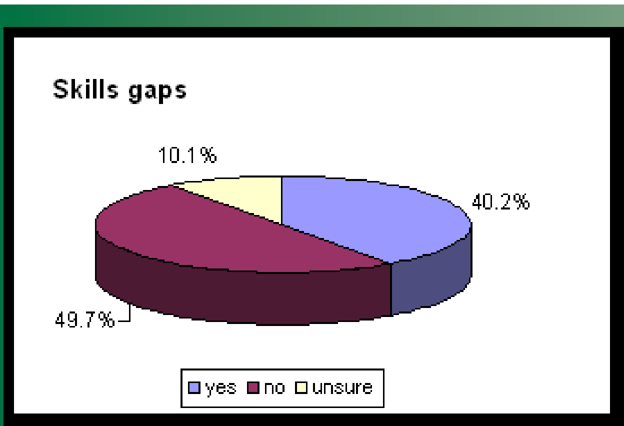
Other less significant barriers identified include:

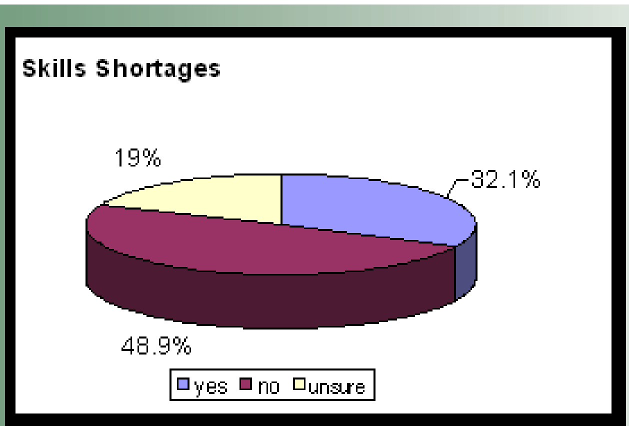
- The possibility to send staff to training courses given small numbers of employees in the organizations
- Transport difficulties and travel costs
- Expenses for the participants associated with attendance at training courses

New training models and formats should be considered and tested by the training providers, that in many cases are sticking to extremely traditional models, more suitable to initial rather than lifelong learning. Employers and employers ' networks should also consider new models of supporting and financing training for staff at the various levels of employment and phases of the career. At the same time new models to facilitate the impact of training on the organization as a whole, should be conceived.

Skills Gaps and Skills Shortages

One of the key question for the study concerns the analysis of the so-called skills gaps and skills shortages as they are perceived by the respondents. Skills gaps are described as an internal problem, when a company might require a new skill and no one within the organisation currently has the skill. This problem can be solved by recruitment or training. Skills shortages refer to market or external problems, when the company cannot find people with a particular skill in the market place, despite appropriate recruitment attempts.





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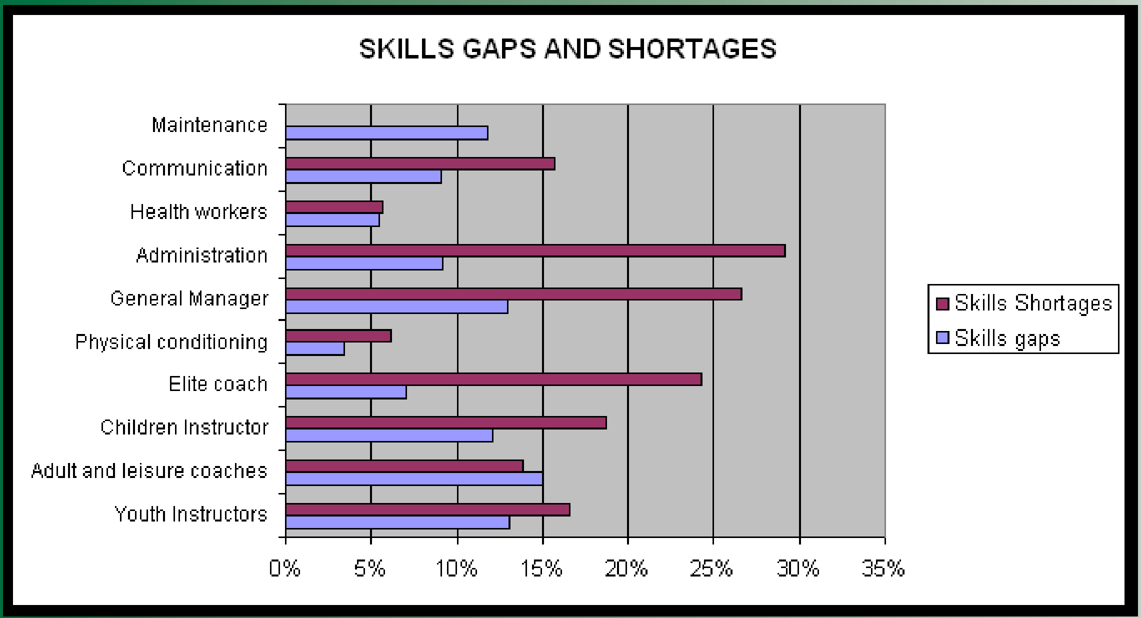
Given the absence of systematic training in most workplaces and the limitations of traditional external training agencies in lifelong learning provision, a high perception of skills gaps by the employers would not be surprising. In spite of this, the majority of the operators do not perceive significant skills gaps, and their perception once again varies significantly by country. In Italy and France only a minority of the operators perceive skills gaps (28 % of the respondents in Italy and 24.5% in France). There is an opposite situation in Germany and UK, where the majority of the respondents (62% in Germany and 58% in UK) feel such gaps. This polarised situation is probably related to the different sizes of the average organisations in the four countries. The growth of dissatisfaction with the size of the operators is in fact evident in all four countries. This means that smaller operators tend to be less unsatisfied. This result is not easy to be interpreted: it could be related in turn to lower expectations, role confusion, or more effective forms of supervisions.

There are obviously significant implications of these results for those training providers which are active both at the pre-employment and lifelong learning. In particular, the results of the qualitative techniques show that for some specific roles (elite coaches, top managers, specialising athletes coaches) providers are not always able to provide training that really matches the needs of the sector. Training is often not sensitive enough to what really occurs on the field and is often described as giving too much emphasis on theoretical knowledge not always applicable in the real world.

The perceived level of skills shortages is also modest, even lower than skills gaps. The figures do not indicate a strong need for more people entering the sector, compared to other growing area of sport and physical activity industry. Once again, in Italy and France the majority of tennis operators (66% in Italy and 53% in France) do not see any problem to find on the market workers capable to meet their recruitment needs.



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Considerable variation is evident regarding the specific occupations exhibiting skills gaps and shortages. The most frequent gaps concern adult/leisure coaches and youth coaches, but also club directors and general managers. Concerning the main area or subjects where competence is lacking, on the basis of forecasted trends in clients' demand, the need of a more extended set of skills of staff can be hypothesised for the future. This concerns specially marketing and event and tournament organizations. In addition to that, competition training and teaching competences are quite often mentioned by the respondents. An exception concern top level coaches whose level of task specialisation is often considered higher than for other professional roles, so that additional skills are not indicated except for the ability to lead a staff and interact with the external stakeholders.

The incidence of skills shortages seem to refer especially to managers, administrative and communication positions. Among coaches and instructors, elite coaches and children instructor are more mentioned than other functions, as difficult in terms of recruitment.

Conclusions

The sector is facing a hard challenge to avoid stagnation. Further expansion of the enterprises require restructuring of work system, more focus on the demands, clear strategies of product and consequent improved recruitment and training choices.
On the basis of the previous results, we can identify a basic set of Priorities for action that are relevant to the specific European context:

- Understand better the trends of the sector and the forces influencing it
- Improve the working conditions
- Improve the relations between the actors
- Upgrade the skills of Workforce, especially in new and non traditional roles
- Increase sector investment in lifelong leaning and modernise the training processes
- Improve training supply and market demand match
- Define and support clearly defined career pathways

Action Plan Framework 2006 -2011

OBJECTIVE	ACTION
Area 1: Sector Growth Potential	
1. Research to evaluate the employment growth and the trends of tennis market 2. Discuss the current state and perspectives of national development plans for the sector 3. Define future scenarios, especially referring to portfolios of services and mix of facilities and new forms of work organisation.	1. Identifying potential funding streams (especially EU, Leonardo Da Vinci, etc.) with networking initiatives to involve main stakeholders (ITF, EOSE, etc.) 2. Bring National and International bodies (Federations, Employers/Employees) together to discuss action plans 3. Monitoring gaps between existing facilities and infrastructures and forecasted scenarios
Area 2: Training Innovation	
1. Refine and test the ENSSEE (European Coaching Council) coaching qualification framework, developed in collaboration with ITF, as the benchmark for training of tennis coaches and instructors. 2. Develop innovative training models for non traditional occupations, not targeted by training providers (e.g. specific management positions) and encourage correspondent qualifications 3. Define procedures to enhance the transparency of qualification and recognition of informal and non-formal learning 4. Identify European quality standards for coaches and managers training 5. Engage stakeholders in the development of lifelong training linked to career pathways	1. ITF working in partnership with National Federations and other qualification/training bodies; Promotion of the results of the ENSSEE/ECC work to national training agencies and awarding bodies. Final publication of the qualification framework after consultation with ITF. 2. Inventory of existing best practices and links with EOSE, ENSSEE, National Sports Observatoires for further research. Promotion of networking with Universities and other training providers. New training formats with innovative subjects and learning outcomes, closer to the market needs. More interactive/applied training especially for Coaches, Instructors. Training to include “generic” skills—business strategy, marketing management, customer care etc. 3. Examine and define tools to provide support at a European level to national agencies for higher transparency and recognition of informal/non-formal learning 4. Determine the most effective framework at EU level taking national differences into account 5. Link career pathways to promotion; Develop models of European Vocational Credit systems to accompany effective career development;
Area 3: Mobilising employers	
1. Encourage employers to recruit Instructors and Coaches with certified qualification 2. Discuss procedures, tools and support systems to adapt training to market needs 3. Creation of employers networks	1. Action of promotion and publicity to national stakeholders and employers 2. Consult employers (and also employees) to identify methods to deliver training more suitable to current needs. Produce and templates for employers to carry out needs analysis in key business areas 3. Bring together employers at National/International level
Area 4: Career Development	
1. Research on typical career pathways and blocks across the EU 2. Networking of employers organisations with Universities and other training providers to link lifelong training and career pathways	1 Inventory of best practices and guidelines to support employers 2. Inventory of best practices and suitable environmental/legislative conditions to support them.