

Organization management and the development of a qualification system in the outdoor recreation sector: A case study of Estonia

R. Tuula¹, A.J. Martin²

¹*Institute of Health Sciences and Sports, Tallinn University, Tallinn, Estonia*

²*School of Sport & Exercise, Massey University, Palmerston North, New Zealand*

ABSTRACT

In the Estonian context, where the outdoor sector (outdoor recreation, outdoor activities, outdoor pursuits, adventure tourism or adventure sports, ecotourism, nature based tourism etc.) is a substantial part of the overall 'Sport & Active Leisure' scene, the need for qualified providers or program managers continues to grow. Emerging issues are a lack of organization structure, clear legislation, risk management, and a satisfactory qualification system. Despite the recent economic recession that adjusted the market in many ways, including active leisure markets, the number of participants in different forms of outdoor activities has been growing remarkably, and the number of providers has not decreased in Estonia. Therefore facilities and conditions provided for recreational use in the outdoors continue to be developed. However, in order to provide balanced development of the sector, there is a need to focus on more aspects than just making the outdoors available for multiple use. Through a review of local literature, this paper discusses the issues Estonia is facing and raises questions about the need for organizational management and the development of a qualification system in the outdoor sector.

KEY WORDS

Outdoor recreation, Estonia, organization management, qualifications

OUTDOOR RECREATION

Outdoor recreation has shaped human-environment relationships throughout history and is an integral part of many cultures and economies. The popularity of outdoor recreation has grown remarkably, and new forms of activities continue to be developed (Plummer, 2009). Outdoor recreation is an interdisciplinary area of study. In Estonia, there are three main areas that are closely related: sports, active tourism and recreation. All these areas can be compared based on primary dual pairs: location (inside/outside; close to home/outside home area), purpose (process/result oriented), the form of action (cooperative/competitive), rules (formal/non-formal), the form of participation (active participation/passive observation), philosophical principles (hedonistic/lust) (Noormets, 2011). So called 'sporting leisure pursuits' are often rephrased into 'active leisure' (Smulders, 2010) or 'recreation' (Noormets, 2011) where 'fitness' and 'outdoors' are considered to be

the most important cornerstones. Figure 1 explains the relationship between different segments related to sport, recreation or active leisure and active tourism (or experiential tourism).

In Europe, outdoor activities have been categorized into subcategories that differ due to safety regulations and expected management competence (knowledge and skills specific to sub-sectors and activities): lakes and sea; snow; earth, stream; air (EQFOA¹). The safety of consumers is influenced by many factors including the design and manufacture of constructions/facilities and products, and the behaviour of individuals (Sman et al, 2003). The fact that some organizations are issuing or applying voluntary safety guidelines indicates that they recognize their responsibility for safety, however arguably this leads to a lack of consistent systemic approach.

1 'European standards for Outdoor Animators' is the first European Leonardo da Vinci project executed by Skills Active in 2006-2008 to respond to 'outdoor sector' issues. www.eqfoa.eu

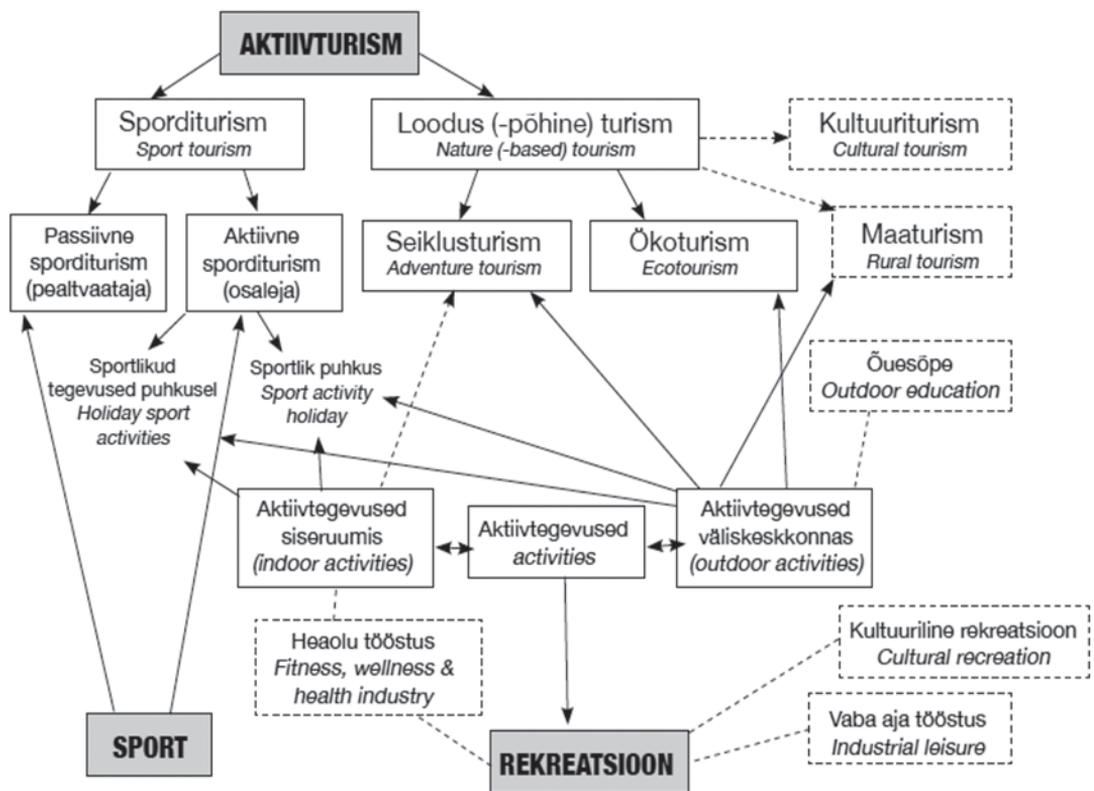


Fig. 1. Sports, Recreation/Active Leisure, Active tourism – related links (Noormets, 2011)

ches. Across all outdoor activities the main purpose is to provide positive opportunities for managed experiences through challenging outdoor activities. Participant should enjoy, learn or develop through the provision of effective services and products that meet and/or exceed individual's expectations and potential (EQFOA, 2008a).

OUTDOOR RECREATION ORGANIZATION

Outdoor recreation providers need to guarantee the quality of the product/service and safety for the participant. They also need to analyse the market, potential demand, participation in specific products and services, acceptable costs and prices, and available and accessible resources (natural, human, physical, financial). A national and international framework for the outdoor sector in Europe has been argued within 'sport & active leisure' organizations (Smulders, 2010) (e.g. ENGSO², ENSSEE³, EOSE⁴,

EASE⁵). In the 1990s there were very few organizations focusing on the outdoor sector, in contrast to the field of fitness (European Health and Fitness Association, est. 2001). More recently, the European Confederation of Outdoor Employers (EC-OE)⁶ was founded (2008). A milestone for active leisure in Europe was the extensive study published in 2004 by EOSE called Vocasport⁷. According to Vocasport over 70 000 commercial companies (small and medium-sized) are employing some 300 000 employees to provide recreational leisure activities in the open air in Europe today (for local urban customers, European and global tourists) (Smulders, 2012). Significant growth has been in the commercial sector, where small and medium-sized providers perform most of the management functions, e.g., marketing, sales, finance, logistics, administrative, executive. Typically products/services in commer-

2 The European non-governmental Sports Organization (1995) www.engso.com

3 The European Network of Sport Science, Education & Employment (1989) www.enssee.eu

4 The European Observatoir of Sports Employment (2002) www.esose.org

5 The European Association for Sports Employers (2003) www.easesport.org

6 The European Confederation of Outdoor Employers (2008) www.ec-oe.eu

7 Vocasport is the name for an extensive study 'Improving employment in the field of sport in Europe through vocational training' by EOSE in 2004

cial outdoor companies are diverse: organizing transport and overnight stays, supplying food, organizing activities and logistics, guiding/educating participants, renting equipment or infrastructure. There is a fundamental issue of professionalizing and up-skilling the sector, especially in key areas of business, organizational and management development, due to the high degree of seasonal fluctuation in the workforce. Whilst paid employment is a key economic feature, and plays an enormous part in the successful delivery of outdoor services, competence and risk management developments are priorities. A competence framework should include all the functions within the outdoors, from management and customer service to technical operations and maintenance (EQFOA, 2008b). The mobility of customers throughout Europe has increased debate about the mobility of staff and of mutual recognition of qualifications (Smulders, 2012). Outdoor recreation is not a limited phenomenon and doesn't exist in a vacuum – it is a profession that also needs proper organization, specific training, and governmental support in development to guarantee qualified delivery.

METHOD

This case study provides a review of recent Estonian outdoor recreation publications. Research literature and professional sources were analysed primarily from tertiary, not-for-profit, commercial, tourism, public and governmental organisations.

FINDINGS/DISCUSSION

The outdoor sector in Estonia is relatively small economically, but plays a significantly more important and influential role than its economic size would suggest. There are some major interdisciplinary denominators of outdoor recreation management (Smulders, 2010, 2012).

- Economic sector, governance and counterparts (see classification of economic activities, NACE)⁸: governing bodies, ministries (labour, economy, tourism, education), Olympic committee, employee unions, leagues, other federations, and related specific revenue and fiscal aspects (service purchase, taxes, VAT regulations, and accountancy).
- Multifaceted characteristics of the market: outdoor companies are mostly small or medium sized business (self-delivered/organized/guided, sole traders and individual service providers,

commercial/public/not-for-profit organizations and clubs, volunteers and charity, specialist organizations or part of large diverse corporations) with focus on service competences, often delivering 'packaged or personalized and multi-activity' products to different types of clients (individuals, families, social-educational-work groups, children-youth-adults etc.

- Technical aspects of outdoor activities (risk management) and quality issues: refers to general job descriptions of outdoor animators (competence framework), qualification systems, insurance and justice principles, and existing non-regulatory measures (co-regulatory or self-regulatory) related to the safety of outdoor leisure activities (codes of conduct, guidelines, best practices, voluntary standards, etc.)

CHARACTERISTICS OF THE OUTDOOR MARKET

According to Statistics Estonia⁹ (SE), during 2009-2010 one-third of the population participated in sport, i.e. 425 000 of approximately 1.3 million; 41 % of men and 31% of women (Kommel, 2012). Approximately 59% do sports at least once/twice a week, 41% spend time on sports at least three times a week. The majority do not visit any fitness/sport clubs or centres but prefer to enjoy recreational sports in a self-organized way. According to a health tourism (including medical, health care, spa and wellness tourism) survey issued by Estonian Enterprise (EAS) (Tooman, 2012) there are approximately 34 venues offering services related to health promotion. Health clubs and sport centres are also offering coaching in different outdoor activities.

The State Forest Management Centre (RMK) has developed a network of nature trails (over 90) in protected areas (12) and national parks (5) (including 13 recreational areas), nature centres (10), campfire places, and forest huts. Estonia has a remarkably large variety of resources for nature (based) tourism. According to the survey on nature (based) tourism entrepreneurs in 2008 (executed by EAS) and the development plan of Estonian Rural Tourism¹⁰ (Eesti Maaturism, 2004; 2009) approximately 500 organizations (small companies with 2-10 people), self-employed entrepreneurs (FIE), and freelancers were mapped in Estonia engaged in nature (based) tourism. Most providers practice in the outdoors as a secondary job, over 40% are non-profit organizati-

8 NACE code: Statistical classification of economic activities in the European Union, harmonized in 2008 http://ec.europa.eu/competition/mergers/cases/index/nace_all.html

9 Statistics Estonia (SE): <http://statistikaamet.wordpress.com/2012/06/28/terviseporti-teeb-iga-kolmas-inimene/>

10 Estonian Rural Tourism (Maaturism) : <http://www.maaturism.ee/index.php?id=contact>

ons and freelancers, and approximately 60% use subcontractors to deliver active tourism services. Their main clients are Estonian, with less than 30% being foreign clients. The sector is versatile, seasonal (very weather dependable) and fragmented (lots of self-operation and self-guided activities). Competition is high and one problem is little cooperation between companies. Obstacles in sector development have been argued to be a lack of financial support, competent workforce, and national regulations. Further research in addition to nature (based) survey and rural tourism development plans revealed that the number of entrepreneurs in active tourism is even larger. There is a need for quality systems (standards, levels on services/products, competence), for product/service innovation, for legal support, and for cooperation (national, international). For example there were 45 entrepreneurs detected delivering ropes course related services (adventure park, ropes courses, rappelling, rock climbing) (Koppelmann, 2009); there are 7 adventure parks. There are over 100 service providers related to shooting activities (paintball, archery, hunting, air-soft, practical shooting etc.) (Lill, 2009). Archery and paintball are the most popular including over 50% of providers. In water based activities (canoeing, sea-kayaking, rafting, recreational boats, jet-skis), there are some 75 providers (Hännikäinen, 2010).

GOVERNANCE SUPPORT OF THE OUTDOOR SECTOR THROUGH SPORT & TOURISM

In Estonia there is lack of common understanding, and it is unclear whether nature (based) tourism (including the outdoor sector/active tourism) is governed by 'tourism' or the 'sports' sector. In addition, recreation, sport and active tourism are closely related to the health sector which should be at least passive partner in the development of the sport and tourism sector. All these mentioned sectors belong to the service sector according to NACE. In Estonia, the field of 'tourism' is managed by The Ministry of Economic Affairs and Communication, under whose governance the Estonian Tourist Board of Enterprise Estonia¹¹ acts. Departments and activities of The Ministry of the Environment¹² (ME) give regulations for risk management to active tourism providers using the natural environment for recreational purposes. ME also administers the State Forest

Management Centre¹³ (RMK), the Environmental Board¹⁴ (KA) and the Estonian Maritime Administration¹⁵ (VTA), which are involved in the management of natural resources and the environment. All these national governmental organizations control the outdoor sector with general regulations, guidelines, codes of conduct concerning the outdoors as a place/location for recreation. Several other tourism related organizations are important for promoting active tourism and the outdoor sector: the Estonian Rural Tourism and Estonian Ecotourism Association¹⁶ (ESTECAS). Both organizations are non-governmental and non-profit member organizations that connect individuals, organizations and authorities for ecotourism and rural tourism.

At a state level, the Ministry of Culture, who work in close cooperation with the Ministry of Social Affairs and the Ministry of Education and Research, coordinates sport and recreational sport. Traditionally, the public sector provides the conditions for independent and organized sports activities leaving the day-to-day management to sports organizations and federations. The Estonian Olympic Committee¹⁷ (EOK), sport federations and unions (majority are members of EOK), Sport-For-All (member of EOK) support, develop, promote sport and act upon Fair Play, the Olympic Charter, and the Estonian Sport Charter. A direct link between the sports sector and the outdoor sector on organizational level is the Estonian Ramblers Association (ERA) who is a member of the EOK. However, within this sport focused system, the outdoor sector and active leisure as a recreational outcome is poorly focused.

The conflict between the sport and tourism sector is further explained through aspects of the qualification system. The Estonian Qualification Authority¹⁸ (trademark – Kutsekoda, EQA) facilitates the establishment and development of an integrated and organized professional qualifications system, linking the educational system and the labour market. EQA is directed by the European qualifications system, NACE and ISCO principles. EQA uses the major grouping of 'service professions' to include tourism and travel related occupations currently available in Estonia (tourist guide, rural tourism entrepreneur,

11 Estonian Enterprise (EAS) <http://www.eas.ee/en/for-the-entrepreneur/tourism> promotes business and regional development in Estonia. EAS is one of the largest institutions within the national support system for entrepreneurship

12 The Ministry of the Environment: <http://www.envir.ee/58737>

13 State Forest Management Center: <http://www.rmkk.ee/organisation/operating-areas>

14 Environmental Board: <http://www.keskkonnaamet.ee/eng>

15 Estonian Maritime Administration (VTA): <http://www.vta.ee/atp/?lang=en>

16 Estonian Ecotourism Association (ESTECAS): <http://www.ecotourism.ee/eng/>

17 Estonian Olympic Committee (EOK): <http://www.eok.ee/organization>

18 The Estonian Qualification Authority (trademark – Kutsekoda;EQA) <http://www.kutsekoda.ee/en/kutsekoda>

travel consultant, tour operator, tourism manager, wilderness guide). However, occupations in the outdoor sector (instructor, guide, outdoor facilitator, outdoor coach etc.) are divided unclearly in the EQA system. As the only so called formal representative of outdoor employers, the ERA (member of the EOK), issues the only qualifications available (coach in hiking, in mountaineering, in water based hiking, on bicycle) for the outdoor sector today. The qualification system in the outdoor sector is governed by the Estonian Coach's Qualification system (managed by EOC) and evaluated by the Council of Culture (under jurisdiction of Ministry of Culture) in Estonia. The difficulty lies in the fact that according to NACE and ISCO the outdoor sector should be evaluated by the 'service sector' (Council of Service) not by the 'education or culture sector' (Council of Culture).

QUALITY AND SAFETY ISSUES IN THE OUTDOOR SECTOR

The quality of the services depends on the infrastructure and their attractiveness, the risk management system of the target centres and their activities, and proactive providers (client behaviour and qualifications). Tourism development plans (Eesti Maaturism 2009; MKM, 2013) are focusing on quality system development, sustainability and attraction factors of services/products in all tourism categories (conference, business, culture, sports, food, nature and sea, health and family). In Estonia safety in the outdoor activities (within active leisure and tourism) is managed mostly within companies itself. In 2000 the Law of Tourism was received by Parliament. It does not clearly express understanding of active tourism, as an object/service/product. According to a nature (based) tourism survey (EAS, 2008) the services and products delivered by providers have uneven understanding on tourism products (packages), and it is not defined in any regulations what are the requirements of the complete tourism product or service package. Active tourism entrepreneurs deliver services that have elements of tourism services described in the law: passenger service, accommodation and catering, guide service, also entertainment, transportation rental. Active tourism entrepreneurs have considered The Law of Tourism to be an important legal aspect in their business operations. The conduct and technical aspects of safety of the outdoor service can be controlled through the occupational qualification system, where required sports/activity specific training and developmental programs should deliver competence in specific

sports/activity. Considering the political jurisdiction of the qualification system in Estonia for a sports coach that expands for the ERA, the Sports Act as legislation in sports is focused instead on the Law of Tourism. Another difficulty with the qualification certification issued by ERA is the fact that at a national level there is no requirement for the personnel to work in the outdoor sector. Further, providers are not motivated to become qualified according to the coach's system, especially due to its focus on sports. Compared to the approximate number of providers (over 500) there is a remarkably small number of certified 'instructors' in the field (approximately 65). According to the study of outdoor activities by categories of EQFOA (lakes and sea; snow; earth, stream; air) on 'non-regulatory measures related to the safety of outdoor leisure activities in the EU' by ECOE (2012, final report has not been issued yet), the situation in Estonia revealed that there are very few regulations and laws and non-regulatory measures (guidelines, best practices, codes of conduct, voluntary standards) related to safety that are commonly accepted among providers in the outdoor sector. However outdoor instructors/coaches have mentioned other laws and regulations to be followed concerning safety (Siim, 2005;Lobjakas, 2009): Law of Safety of the Product and Service, Rights for Passage (not formal legislation), Law of Obligations, Consumer Protection Act, Profession's Act, Conservation Act, Rights of Passage. All national governmental organizations control the outdoor sector with general regulations, guidelines, codes of conduct concerning the outdoors as a place/location for recreation with focus on risk management (departments of ME, RMK, KA and VTA), which are mostly being considered in the delivery of service by providers. For example, most local regulations for using lakeside, riverside, seaside areas are set by local operators (park service, RMK etc), and traffic on the sea is regulated by the Estonian Maritime Administration¹⁹ within the Maritime Safety Act and Traffic Act. The rules and regulations of the Estonian Rescue Board²⁰ are also being followed by most outdoor providers, especially ones involved in water based active leisure. Regulatory measures, such as the Nature Conservancy Act and Traffic Law are specifically followed and controlled as safety measures for small motor vehicles (4x4 drivers, quads,

19 Estonian Maritime Administration (MA) a governmental agency that operates within the area of government of the Ministry of Economic Affairs and Communications. <http://www.vta.ee/atp/index.php?id=2098>

20 The Estonian Rescue Board (ERB) is part of the Ministry of the Interior, http://www.rescue.ee/index.aw/set_lang_id=2

snowmobiles). The regulations and non-regulatory measures (in addition to the main ones mentioned above) to be followed in shooting activities are more clear than in any other activity (due to the risk level of the equipment use): Arms Act, Safety Regulations for shooting range and area and competitions/trainings, Hunting Act and Regulations, Forest Act (using parts of the forest).

Some providers have cooperation with sports federations/association that issue the sports coach qualification and have issued risk management guidelines to be acknowledged and followed (snowboarding, downhill skiing, sea-kayaking, hiking). But in the sports-focused system, recreational aspects often suffer from a lack of attention (horseback riding, shooting activities). Many providers, community based associations and clubs develop the market through their international instructors training system but at a national level there are no requirements or supervision on service delivery and safety management (kite-surfing, windsurfing, diving, sea-kayaking).

There are international EU regulations also for constructions and facilities prepared for recreational use, which have no surveillance at a national level (ski lifts, water-skiing/wakeboarding cables, high ropes courses/adventure parks, sky diving). In many cases suggested non-regulatory measures are presented in the association's, providers', entrepreneurs' websites (water based activity providers, small motor vehicle operators, rope climbing, sky diving). Often most of the communication is shared within the community in forum based websites and have a strong community based initiations (sea-kayaking, rope climbing, ropes courses/adventure parks). However, within specific activities the safety regulations and qualification requirements are unclear, not unified or commonly accepted, with no surveillance

of the market. International membership in specific organizations and acceptance of international qualification and safety regulations and measures within communities is encouraging to claim about the quality of the services. But in general, anyone could currently provide services in the outdoor sector.

CONCLUSIONS

The development of the outdoor sector is not structured, lacks consistency and clear support at a governmental level. The outdoor sector needs clear management and organizational structure but first common understanding of the definition of the sector needs to be reached. In addition a clear position on NACE and ISCO should be stated to endorse common understanding of the sector and governmental support. Safety regulations and occupational qualifications necessary for the outdoor sector require the jurisdiction of a governmental body (e.g., the Ministry of Economic Affairs and Communication). National authorities should improve their surveillance systems in view of providing better information on active leisure related services. Tourism laws should be revised and articles on active leisure/tourism should be added. An occupational system needs to be specified or created for the active leisure/tourism sector similar to the qualification system of 'sports coach', which is accepted, functioning and justified in the sports sector. Further study on job analyses needs to be done to show the differences at an occupational qualification level between the sports and tourism sector. It is also advised to encourage national organizations in sports and leisure businesses (profit as well as non-profit) to further develop the effectiveness of their quality and safety promotion programs, in order to ensure reduction in injury risks and higher safety levels for consumers.

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