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SCENARIOS 2020 FOR THE FINNISH SPORTS INSTITUTES

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<p>Finland is facing a huge sustainability gap in the upcoming years. The Ministry of Education and Culture will need to cut its actions by 2,6 billion euros in 2015-2017. These cost-cutting measures will affect Finnish sports institutes and especially their education.</p> <p>In the spring of 2014 all 11 national sports institutes started a strategy process for their network. During this process three future scenarios were written for 2020. In these scenarios sports institutes either strengthen their co-operation (corporation), become regional centers (locale) or continue as independent institutes (guerilla). Most likely in 2020, parts of all three scenarios are taking place in sports institutes.</p> <p>Scenarios are based on the material produced by the sports institutes' personnel during the network's strategy process, different future reviews and research on future trends.</p> <p>In an uncertain future, the scenarios offer three models for Finnish Sports Institutes in 2020.</p> <p>Keywords: education, network, scenarios, sports, sports institutes, strategy.</p>		

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<p>Työn lähtökohtana oli tietoisuus Suomen valtion kestävyysvajesta ja yhteiskunnan lähivuosien leikkauksista opetus -ja kulttuuriministeriön toimialalla. Nämä säästötoimet, 2,6 miljardia euroa, tulevat vaikuttamaan merkittävästi urheiluopistojen toimintaan ja erityisesti niiden koulutustoimintoihin.</p> <p>11 valtakunnallista liikunnan koulutuskeskusta, urheiluopistoa, käynnisti yhdistyksensä kautta urheiluopistoverkoston strategiaproessin keväällä 2014, jonka yhteydessä kirjoitettiin tulevaisuuden skenaarioita vuodelle 2020. Tuloksena syntyi kolme tulevaisuuden skenaariota: korporaatio, lokaali ja sissi. Skenaarioissa kuvataan urheiluopistojen tulevaisuutta erilaisten tulevaisuuskuvioiden kannalta. Lähtökohtana on se, että tulevaisuudessa urheiluopistot joko tiivistävät merkittävästi yhteistyötään (korporaatio), profiloituvat alueellisiksi toimijoiksi (lokaali) tai jatkavat entistään itenäisempinä toimijoina (sissi). Skenaariot pohjautuvat urheiluopistoverkoston yhdessä työstettyyn materiaaliin verkoston strategiaprosessissa sekä eri tulevaisuus-katsauksiin. Todennäköinen tulevaisuus pitää sisällään osia kaikista esitetyistä skenaarioista.</p> <p>Avainsanat: koulutus, liikunnan koulutuskeskukset, liikunta, skenaariot, strategia, urheilu, urheiluopistot, verkosto.</p>		

1 INTRODUCTION

There are constantly issues occurring around us that we are unable to affect. We can only plan. During the next three years (2015-2017) there will be a retrenchment worth of 2,6 billion euros in the operations funded by the Ministry of Education and Culture and operations need to be intensified at all levels.

At the request of the Ministry of Education and Culture the network of Finnish sports institutes started working on network strategy in the spring of 2014. A scenario method was chosen as part of the strategy process, because scenario planning is particularly suitable for organizations in times of uncertainty or when strategy needs to be refocused (Schoemaker 1995).

Scenarios are based on the results of sports institutes' workgroups during strategy process, different future reviews and research on future trends. The strategy process for the network has been led and processed by the general managers and/ or principals of all 11 sports institutes. The strategy process took place between March and August 2014.

As a result, three scenarios were produced: corporation, locale and guerrilla. Scenarios describe the future of sports institutes in a position where institutes strengthen their co-operation immensely (corporation scenario), or profile themselves as regional centers, or continue as even more individual players.

The critical success factor for sports institutes will be the Ministry of Education and Culture's decision about who will be given authorization to provide vocational education in sports starting in 2017. The process is currently in progress at the Ministry behind closed doors. But an even greater factor than the authorization of education is the ability of the network to work together and make choices to build a more prosperous future.

The possible future of sports institutes will most likely include parts of all scenarios presented.

2 SCENARIOS FOR FUTURE PREDICTIONS

Future-oriented thinking helps to identify future opportunities or threats. Preparation makes it possible to act on behalf of building the desired future or preventing the expected threats of the future. Research of the future is to some extent making the future and simultaneously a statement of how the future development will take shape. (Kyllönen 2011, 91.)

Reliability is difficult to define when researching the future. The assessment of research of the future is limited, because the accuracy of built descriptions or models can only be tested in the future (Hirsjärvi & Remes 1986, 2-4).

Scenarios are modern future research and describe alternative worlds. Scenarios help to imagine what is possible and analyze what is probable. They work as a base when an organization chooses the future it desires and is willing to implement it. (Meristö 1993, 215-216, Walden ja Ylä-Anttila 2001, 3.)

'Scenario' is originally a movie term, originally meaning the director's version of the script. It has been used as a tool for researching the future since the 1960's. Even though scenarios are one of the key concepts when researching future, they can be used in a variety of ways utilizing many methods. There is not just one single way to build a scenario. The context and objectives of the researched subject determine the approach and methods to be used in planning a scenario. (Mannermaa 2003, 29-32; van Notten 2006, 87-88.)

The meaning of scenarios is to create strategic discussion about the future and challenge prevailing world views. Scenarios help to visualize the future and the key factors affecting it. Scenarios are well suited to analyzing the effects of changes in the operating environment. (Walden ja Ylä-Anttila 2001, 3.)

In the midst of major changes the scenario method can be used to identify a number of different possible future states and paths leading to them. An organization using

the scenario method receives immediate help and support through increased information about the future and what is related to it. (Vesiluoma 2012, 122).

The scenarios are not prepared plans or predictions of the future, but rather justified stories about what the world might be like tomorrow. The scenarios should be consistent, focusing on the essential aspects, and at least to some extent possible, because they are not about building a utopia. On the other hand the scenarios will also be able to question the prevailing beliefs and understanding, and to challenge new thinking. (Schwartz 1998, 6 ja 61.)

The strength of the scenarios is that they expand our thinking beyond the present. The idea of the scenarios is not to predict what will happen, but to prepare for what might happen and therefore improve the building of objectives for organizations and to help decision-making (Masum, Ranck & Singer 2010, 54-66).

A scenario is one vision of what can happen in the future. It is typically a particularly significant viable world to which you want to pay special attention (Kamppinen, Malaska & Kuusi 2003, 31).

Scenarios are decision-making tools for when rapid changes and complex interactions prevail. They describe a number of options for the future and make it possible to analyze multiple problems and to improve participants' knowledge. Scenario building also serves as a learning process in which the participants become aware of the expected things. (Masini & Vasquez 2000, 53, 63.)

Scenarios need to differ significantly from each other and represent different paths of development, because the aim is to provide alternative models of the future (Schwartz 1998, 19). It is essential that the specified future states are possible and legitimate if the operating environment changes in the predicted way. In decision-making a single scenario cannot be regarded as more likely than another (Van der Heijden 2005, 4).

In scenario building a number of different methods can be used. Often the driving forces that affect the future generally are investigated first. Based on these forces

trends can be identified. Trends can be combined in turn to outline scenarios (Walden & Ylä-Anttila 2001, 3.) The scenario method is typically very flexible (Masini & Vasquez 2000, 63).

Those involved in the scenario work should be genuinely interested in the topic in order to create a real dedication to scenario work. Genuine interest and curiosity are more effective as tools than any of the pre-designed tools (Schwartz 1998, 4-6, van Notten 2006).

Scenario building is often a process that complies with the following general progression: defining the target, defining the key factors - both internal and external -, identifying the main trends and driving forces, and building scenarios as a basis for policy proposals. A variety of methods and data collection methods can be used within the same study (Vesiluoma 2012, 117, Schwartz 1998, 241-247).

According to Schwartz (1998, 19), scenarios seem to fall into three groups: more of the same, but better; worse (decay and depression); and different but better (fundamental change).

In addition to creating strategic discussion about the future and challenging the prevailing world view, the objective of the scenario method is often that shaping the future can be influenced by one's own actions. This has also been the key assumption in describing sport institutes' scenarios.

3 NETWORK OF SPORT INSTITUTES

There are 11 national sports institutes in Finland. Geographically sports institutes are located in different parts of Finland covering the whole country.

Finnish Sports Institutes:

Eerikkilä Sports Institute, Tammela
 Finnish Sports Institute, Heinola/Vierumäki
 Kisakallio Sports Institute, Lohja
 Kisakeskus Sports Institute, Raasepori
 Kuortane Sport Resort, Kuortane
 Santasport Institute, Rovaniemi
 Solvalla Sports Institute, Espoo
 Sports Center Pajulahti, Nastola
 Tanhuvaara Sports Institute, Savonlinna
 Varala Sports Institute, Tampere
 Vuokatti Sports Institute, Sotkamo

(Urheiluopistojen Yhdistys ry 2014a)



GRAPH 1. Finnish Sports Institutes

Sports institutes were founded by Finnish sports people and organizations. With government contribution sports institutes have grown into advanced multifunctional sports centers. They have developed into a versatile nationwide network. (Association of Sports Institutes of Finland 2014a).

Sports institutes are liberal adult education institutions that in addition organize vocational education and vocational further education in physical education, and work as training centers for different sports. Sports institutes also offer their services to companies and private individuals in a versatile environment for leisure and sports activities. (Ministry of Education 2009, 7.)

Each sports institute has different areas of expertise which are affected by regional and geographical factors, partners and sports facilities. In 2007, sports institutes

identified the following key joint efforts for the network: education, sports and coaching, as well as health-enhancing physical activity (Association of Sports Institutes of Finland 2007, 8).

The Finnish Sports Institute concept is a unique combination in European education and training. Such a nationwide network of sports institutes, where the different levels of education and training activities, world-class sports and leisure activities are on the same context, exists nowhere else in Europe. Institutes are open seven days a week, 365 days a year. The sports institute's infrastructure is thus effectively utilized. (Pietilä 2014.)

Although sports institutes are independent bodies they still form a network. Sports institutes have formed a coalition which has begun to form into a network due to interdependence and joint needs. (Ministry of Education 2009, 8).

An effective network is based on trust and its activity is always interaction between people. Networking takes place between people, but many corporate and organizational networks are permanent, even when personnel changes. Networking is not easy and it requires parties to be active and practice effective interaction. Benefits of co-operation must exceed the targeted stakes. (Korkala 2010, 160.)

The operating environment of sports institutes is changing rapidly and joint streamlining is needed among sports institutes. The key element for sports institute network activities and success is the network's ability to learn and to renew itself. (Association of Sports Institutes of Finland 2014c.)

The Association of Sports Institutes of Finland, established in 1988, promotes the common interests of the sports institutes' network. The association manages tasks common to all sports institutes. It co-ordinates projects, conducts marketing and lobbying, arranges meetings and implements other tasks directed by its board. (Ministry of Education 2009, 8.)

4 SCENARIOS AS PART OF THE SPORT INSTITUTE NETWORK'S STRATEGY

In the past the sports institute network's strategy aim has been to build a close and openly functioning competence network (Ministry of Education 2009, 8). In the strategy process scenarios were selected as part of the process because scenarios assist in seeing the current situation in a new light, and at best they support decision-making. Scenarios were chosen to be part of the strategy process also because of the uncertainty of the rapidly changing operating environments of sports institutes and because according to literature, the scenario method is very suitable for parallel situations (Meristö 1993, 215-221, Vesiluoma 2012, 119).

The objectives of sports institute network scenarios can be explained by describing Van der Heijden's (2005, 5-7) three scenario-based design objectives. According to him, the first target is associated with the quality of decisions: understanding the potential future conditions one can simply make better decisions than those without this understanding. The second objective is a quality of thinking about the future, that is, achieving something new which cannot be achieved by other methods. The third objective relates to the fact that the personnel involved in the planning of scenarios are aware of events around them and are able to evaluate their impact on the part of the whole.

The purpose of scenarios is to help the operative personnel of sports institutes to see different options for the future and to take measures towards building a desired future.

4.1 Creating scenarios for sports institutes

Schoemaker (1991, 550) presents eight points, which are particularly fitting for the use of scenarios:

1. Uncertainty is high.
2. Encountered costly surprises in the past.
3. Only few new opportunities are identified and utilized.
4. Quality of strategic thinking is modest, the planning has become routine.
5. Industry has experienced or experiencing major changes.
6. The common language and framework are necessary.
7. When there are strong differences of opinions.
8. Competitors use the scenario method.

Investigating the situation of sports institutes, it was easy to find all of the above points in the everyday life of sports institutes. Both the scenario work and network strategy were genuinely required.

Schwartz's (1998) approach to scenarios represents the intuitive school, which does not use formal models, but is primarily based on intuitive thinking. Van der Heijden (2005) and Shoemaker (1991) represent a heuristic school of thought which emphasizes the scenario of a work process, as well as the intellectual property of the participants' knowledge and creativity. The sports institutes' scenarios are a mixture of these two. By surveying the operating environment expert knowledge has been collected with the process method, but scenario stories were written intuitively, environment mapping in mind.

Scenarios 2020 for Finnish sports institutes began by defining the scenario process and how it is linked to the ongoing strategy process. Stages in the preparation process consisted of: a PESTEL analysis in the strategy process, an operating environment analysis and future trends, a literature review, choosing scenario paths and producing scenarios. At the same time the sports institute network strategy was created and strategic priorities were chosen.

First, the sports institutes' management set objectives for the strategy process, after which the sports institute network's operating personnel worked on the background of strategy and the operational analysis with more than 50 operating staff from sports institutes. Themes of the workshop were: creating awareness of the process, changes in sports institutes' environment, anticipation and brainstorming.

In the second stage, six different sectoral working groups wrote about future perspectives and completed a SWOT analysis of their industry. The industries were education, coaching, management, liberal adult education, commercial services and co-operation with folk high schools. They decided to return to the role of the Association of Sports Institutes of Finland in the end of the strategy process.

Finally, on the basis of previous stages the scenarios were written up. In the corporate scenario, sports institutes significantly intensify their cooperation and create a training company to take charge of the vocational education in physical education. In the locale scenario, sports institutes promote themselves as regional centers of excellence. In the guerrilla scenario sports institutes continue as even more independent actors than today.

4.2 Control by the Ministry of Education and Culture

The Ministry of Education and Culture was a subscriber to the strategy process and specified the process with a variety of guidelines and targets. The guidelines of the Ministry of Education and Culture for the sports institutes' strategy process were as follows:

- The strategy must show how many sports institutes will have authorization to provide vocational education in physical education in the future.
- Sports institutes' liberal adult education should be secured in the future, even though government subsidy will decrease.
- There will be a need to create a common practice for sports institutes, in order to clearly distinguish between state supported and commercial services.
- How will sports institutes' financial performance be developed as a network (centralization of administrative and support services etc.)?
- Are there promising partners outside the network with whom cooperation and administrative savings could be achieved (Folk institutes etc.)?
- Are there possibilities to deepen cooperation with regional sports organizations? (Association of Sports Institutes of Finland, 2014c)

These questions and guidelines had a great impact on the whole strategy process and also the formation of scenarios. Because of these guidelines, the role of vocational education and especially the future authorization permits to provide this education rose to a big role in this process.

4.3 PESTEL –analysis and the operating environment in the future

The process started with a PESTEL analysis of the operating environment of sports institutes. The PESTEL analysis is intended for the analysis of the macro environment and for the identification of the impact of the operational environment (Johnson, Scholes & Whittington, 2008, p. 55). This method was used in order to get a general view of the changes in the operational environment and so future changes in policies could be mapped. In the PESTEL analysis the operational environment is investigated from different angles which are: political, economic, socio-cultural, technological, ecological and environmental, and laws and legislation.

The future operational environments were studied through different future studies of which the most significant was the Review of the Operating Environment conducted by different ministries for the future review of the ministries. (Finnish Government 2014b).

5 THE DESTINY OF THE NETWORK OF SPORTS INSTITUTES

On average, a third of sports institutes' revenue is directed to them from the state as a share of the Ministry of Education and Culture's allocation of lottery money (Association of Sports Institutes of Finland, 2014b). The development of state funding is the biggest factor in deciding the destiny of sports institutes in the future. The Ministry of Education and Culture is facing savings worth of 2,6 billion euros by 2017 (Ministry of Education and Culture 3.4.2014). Most of the savings are directed towards education, which is the basic pillar of sports institutes' operations and finance.

Many things can become future issues for the destiny of sports institutes. Several trends, future prospects and measures will be described in the following. Changes in the operational environment illustrate well the broad field in which the sports institutes operate and what is taken into account in the preparation of scenarios.

5.1 Future trends

In the operating environment survey a number of background studies were taken into account. The most relevant were Sitra's megatrends 2014-15 (Hartikainen 2014), Heikkala's Finnish society and sports culture trends (2014) and the Review of Operating Environment for the ministries' future review (Finnish Government 2014b).

Megatrends are the large waves of development, which have an identifiable direction and reliably continue towards that direction in the future (Mannermaa 1991). They are trends that combine a number of small and minor facts, and it can be expected that they say more about future possible worlds than the trends that constitute them. It is easy to go in the direction of megatrends, and it is really difficult to fight against them. (Kamppinen, Malaska & Kuusi 2003, 33.)

5.1.1 Global megatrends

Global megatrends have been described by Sitra among many others. Sitra's list of global megatrends illustrates one interpretation of the directions of global change phenomena - megatrends. The objective of the trend list is to create a basis and a tool to help increase understanding of visible changes in the world, especially from the Finnish point of view (Hartikainen 2014).

Sitra's trend list includes 13 essential trends for the future of global change phenomena. The following describes the most significant of Sitra's future megatrends for the sport institutes.

Well-being will be even more important to both individual and social levels, and this trend must be supported by the network of sports institutes. As life expectancy increases, services and products must be customized to meet the needs of elderly, which are an important group of consumers in the future. "Experience-centered" lifestyles and closeness to nature become more valuable. Sports institutes can offer both modern technology and natural environment to consumers.

International migration will continue to increase, and for the integration training of the immigrant population sport institutes have both the environment and instrument (physical activity). The new economic powers in the world will be the BRIC countries (Brazil, Russia, India and China), so skills and cultural understanding of these countries become an important competence area also for sports institutes.

From the perspective of renewal and creativity this new era of entrepreneurship creates unprecedented opportunities for those who are able to develop, implement and commercialize new and innovative ideas. Sports institutes must find an ability to develop, implement and commercialize innovative ideas. New thinking, new recruitment and calculated risks are needed.

Sitra megatrends 2014-15 (Hartikainen):

1. Interdependence increases
2. Entities empowered
3. Power relations shift
4. Consequences of climate change are expanding
5. Well-being highlighted
6. Decaying structures of Europe
7. Lifetimes stretch
8. Technology is integrated into everyday life
9. Skills challenge information
10. Inequality grows
11. Steady work patterns crumble
12. Urban roles are emphasized
13. Ecological footprints are outgrowing our 'shoes'

5.1.2 Trends in Finnish sports culture

In VALO's, the national sports organization in Finland, Navigation 1.0 Heikkala (2014) describes major future trends concerning sports and physical activity. Increase of the aging population and lifestyle diseases as a consequence of physical inactivity are key findings that also highlight the need for sports institutes in the future. The amount of the Finnish population's daily physical activity will continue to decline and children's basic physical and motor skills are both weak and one-sided.

Considerable expansion and diversification is expected in the forms of physical activity and exercise, and services supporting physical activity, fitness industry and sports. Traditionally, sports institutes have been in the forefront making changes to sports culture.

Expectations towards sports clubs and sports associations will increase. Thus the know-how, quality and professionalism are emphasized in sports club activities. As educational institutions, sports institutes have a lot to offer for sports clubs of the future, especially in developing sports clubs' and associations' staff and volunteer personnel.

Simultaneously with the increasing political and social demand for sport, political control towards sports will increase. Autonomy of sport is reduced and the competition for people's free time and leisure activities increases. For example the game industry and other screen time reduce people's time for physical activity and sports.

The sports institute network has already some solutions or activities for the trends facing sports and physical activity in Finland. Sports institutes have to make choices and prioritize their operations if they want to be in the lead for taking things forward and win new market shares. Continued development is needed, because expertise does not increase by itself and more and more competitors will enter the sports industry.

5.2 Factors in the operational environment

Finnish social welfare and economic stability are, of course, key factors to the sport institutes' operating environment. Big questions are what the development and general level of citizens' income is? How will healthcare and physical activity as part of citizens' well-being evolve? What kind of role is taken by or given to sports institutes in the future of the education sector of physical education and sports?

The Ministry of Education and Culture is facing the need to make 2.6 billion euros of savings by 2017. Most of these adjustments are directed towards education. In a press release the Ministry of Education and Culture (3.4.2014) summarizes the adjustments in the coming years:

Vocational adult education funding will be cut by EUR 56 million by 2017 and liberal adult education funding is reduced by EUR 18.5 million by 2017, and the reform of structure and financing of liberal adult education will be executed. The aim is to create sufficiently large liberal adult education institutions to ensure the quality and effectiveness of the education.

Lottery resources are subject to a total of EUR 10 million reduction, resulting in cuts of EUR 2.8 million towards sports and physical activity compared to 2014.

Authorization to provide vocational education will be renewed by 2017 to make the network of education providers more efficient.

The Government's budget session agreed on EUR 138 million increases in activities to growth supporting measures and EUR 100 million reductions towards ministry of Education and Culture's activities in 2015.

The funding system of upper secondary level, and the network of its education providers will be reformed during this period.

(Ministry of Education and Culture, 3.4.2014)

The above mentioned growth supporting measures are not affecting sports institutes, but adjustments to funding all the more. Since approximately one third of sports institutes' revenue is government directed funding from the Finnish lottery, the division of lottery money is of great importance for the future of sports institutes (Association of Sports Institutes of Finland, 2014b). A significant amount of funding reduction by the Ministry of Education and Culture will be towards the operations of sport institutes.

5.3 Demographic trends in Finland

The aging population and the increase in the level of education will increase the demand for health and social services, while economic slowdown weakens the funding base for social and health care (Finnish Government 2014b).

There will be a growing challenge to secure adequate amounts of work force. Retirement is particularly high in social and health care in the coming decades. In the health care professional groups the number of retirements in the years 2010-2030 will be an average of 60.3% and in the social professions 60.7% of the 2008 work-force (Väänänen, 2010.).

The demographic dependency ratio, i.e. the children and people of retirement age per one hundred persons of working age in 2011 was 52.9. According to Statistics Finland's population forecast (2012) the limit of 60 dependants would be exceeded in 2017 and of 70 by 2028.

The following ten years will be a time of experimentation, particularly with health related services. Best practices and pilot projects will be developed, because the variable dependency management must be met with durable solutions (Rytsy 2014).

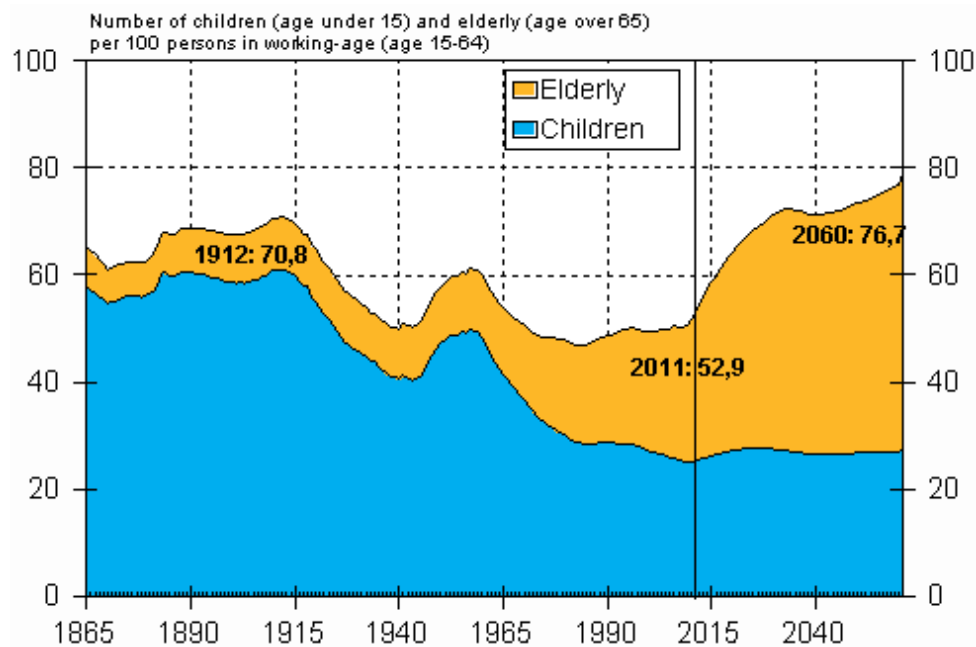


TABLE 1. Population Statistics 2012, Statistics Finland. Demographic dependency ratio 1865–2060.

The rise of temperature by 4-6 degrees on Earth is inevitable with current measures to control carbon dioxide emissions. This means changes in the living conditions and social issues for Finland. A six-month long dark, wet and snow-free period will significantly affect the Finnish public health. (Sitra 2013.)

Type 2 diabetes is a growing challenge. About 15 percent of the middle-aged population has diabetes, and up to 35 percent have some form of sugar metabolism disorder (Finnish Government 2014b).

In the future, the amount of the population's daily exercise decreases, and children's basic skills deteriorate and develop one-sidedly. Even though lifestyles are becoming healthier, the amount of daily exercise decreases and national diseases (metabolic disorders) subside slowly. (Heikkala 2014.)

Positive trends in people's lifestyles reduce health risks and their impact on society. Instead immobility has risen to an evident health hazard equivalent to smoking, obesity etc. (Finnish Government, 2014b). Sports institutes' know-how has a key role in teaching citizens to be physically active and exercise properly.

The biggest question for the sports sector's future is can it find its way into financial resources as a form of disease prevention for the aging population and their symptoms. The position of sport as a preventative form of treatment has been proven beyond doubt (eg. Ministry of Social Affairs and Health 2013), but so far the financial backing which, for example, rehabilitation and medical care enjoy is lacking in sports and physical activities.

Emphasis on the role of sport as a form of preventive health care for aging population is a critical success factor for the future of sports institutes. The national strategy for physical activity and promoting health and wellbeing 2020 (Ministry of Social Affairs and Health 2013) is an important document for sport institutes' lobbying and product development for the next few years. Sports institutes should create functional products for the health and wellness services, locally, and for people of all ages. Furthermore, the Sports institute network will need to network more effectively with the public health community.

5.4 Competence / Know-how

The importance of competence is even greater in the future. The most important factor in competition, for Finnish economy and businesses, is going to be its personnel's competence. Finnish education is recognized internationally as high standard. However, in recent years the learning outcomes of national and international assessments have shown that long-term positive development has come to an end. Learning outcomes have begun to decline in basic studies with pupils terminating school. Skill levels have declined, and the key to achieving a new rise has to be found. (Finnish Government 2014b.)

According to the PISA - study, the level of expertise has fallen the most in Sweden and Finland. At the same time the level of education is developing and increasing in the rest of the world. (OECD 2014.)

The ministries' joint future review reflects the challenges that Finland is facing in the coming years. The future review has been prepared by officials from the ministries along with experts. (Finnish Government 2014b.)

The future review's competence report raised a lot of issues relating to sports institutes. Sports institutes need to develop their learning environments, because digitalization enables new ways to learn and teach. This will be reflected in learning the basics right through to higher education. E-learning and the use of various types of cloud services will be an integral part of any teaching and learning related to networks and the utilization of both collaborative and individual learning support. Sport institutes' education activities are based on boarding school pedagogy, which is the opposite of e-learning. There are no guarantees for the future of boarding schools or internate pedagogy. There will not be hotel-level education supported by the government in the future (Pantzar 2014).

Citizens' responsibility for their own lives and well-being will be increasingly required in the future. A responsibility requirement also applies to life-long learning skills. This is a sign that sports institutes' liberal adult education could have the possibility of expanding and growing.

Competence is emphasized by all sectors and good education will continue to play a key role in the future. The ability to combine and apply research results will become a success factor along with an understanding of customer needs and the ability to network both domestically and internationally. European education and research collaboration will expand. A strong scientific knowledge is Finland's backbone in the development. Sports institutes must require expertise from their staff, and must prepare to educate people more widely and to expand their scientific knowledge and cooperation. International networking is also extremely important.

The above factors indicate that the sports institute network needs to systematically increase its education activities, competitiveness and profitability, in order to justify that it is concentrating the education of sports and physical education into sports institutes is needed also in the future. The sports institute network needs to create structures so that the quality and efficiency of education activities are met. The network needs to highlight the excellence of their liberal adult education through it's comprehensiveness, internate pedagogy and expertise.

5.5 PESTEL –analysis

In addition to the above, the sport institutes' operating environment and the changes occurring were examined in the PESTEL analysis as part of the sports institute network strategy process. In the PESTEL analysis the operating environment is viewed from different angles, which are: political, economic, socio-cultural, technological, ecological and environmental, and laws and legislations. The environmental and law proportions were compressed slightly. The PESTEL analysis is a result of the network's personnel work. Personnel were given tasks in advance, after which they did joint brainstorming and worked in small groups. The PESTEL analysis of the network's operational environment is detailed in the next chapters.

5.5.1 Political factors

The political and social demands from sports will increase. Political control also increases and that will decrease the autonomy of sports. Changes in the organizational structure of sports are directing sports institutes stronger towards regional centers of excellence (Heikkala 2014, KPMG 2014.)

The political direction of a new government program will be published in the spring 2015 after the parliamentary elections. How physical activity and sport are included in the government programme is a major factor determining the direction of sports institutes' operations. The sport institute network has to influence decision-makers

in the government programme preparation stage. For example lottery funds and the allocation of other resources have direct and indirect effects on sports institutes.

Municipal and service reform of the local government and the changes in service structures create opportunities for the sport institutes' network to expand its service towards offering more and more to municipalities. The network's cooperation with the municipalities can be utilized regionally, but also as a network with joint operations.

Finnish sport actors and organizations have changed and are changing. Finnish sports organizations will seek and will be guided to seek performance and efficiency in their actions. Mutual cooperation with different organizations and institutes will be developed towards a more active and purposeful direction.

Change in the field of sport also creates opportunities for the sport institutes. The sport institute network needs to strengthen its position in the Finnish sports as an active and comprehensive player. The sport institute network has the opportunity to increase its effectiveness through the use of high profile training centers and cooperation with regional actors to name but a few. Sport institutes as Finnish destinations should sound appealing in marketing.

Changes in the field of education pose challenges and even threats for planning and implementing athletes' education paths. Sport institutes must be able to demonstrate and provide education for student-athletes also in the future.

Society and education gets more individual. Flexibility, optionality and work based learning is emphasized in the education of tomorrow. This requires new skills and greater resources for educational operations in sport institutes.

Despite of many political threats facing sport institutes, the government has outlined that during the next few years the lottery based funding for culture, sports and youth activities will be secured with sustainability (Finnish Government 2014a).

5.5.2 Economical factors

Finland's economic and employment development's more permanent slowdown is an obvious risk. This kind of development is due to deterioration because of aging of the population, labor productivity's modest development, shortage of skilled labor, and high structural and long-term unemployment. These factors combine to reduce the fiscal base and Finland's competitiveness in the global economy. (Finnish Government 2014b.)

Government adjustments in the coming years will affect sport institutes even though more detailed figures are not known. The public deficit reduces the use of available resources and increases demands on efficiency. The structural change of economics targeted savings towards secondary level and non-formal adult education will require a major reform of the policies and structures of education and training, as well as a more effective and productive use of the declining resources. (Ministry of Education and Culture 13.6.2014).

In the future, the society will become more market and service oriented. Financial resources and cost-effectiveness become a cross-cutting criterion in all activities. Attention is paid to sustainable and good governance. In addition to cost-effectiveness, operators and employees are expected to be open. (Heikkala 2014, National Emergency Supply Agency 2013).

Individuals are expected to take more responsibility for their own well-being. New forms of collaboration and service innovations will emerge in the welfare sector.

As government contribution decreases in the future, sport institutes must emphasize their commercial services. This should not be seen as an opposite to state funding, but more as an enabling matter. Successful commercial services can secure and develop structures and infrastructure but also other needs. This is a way to add to the social significance of commercial services.

Networks and network-like forms of working between businesses and communities are becoming more common. According to the Federation of Finnish Financial Services (2012), the key economic issue is to find partnerships that create genuine win-win situations which will create better and more sustainable results than in the past. The sport institute network will need to find opportunities for cooperation within the network, and thus support each institute's commercial services. In particular, the demand for welfare services and outsourced companies' health-enhancing activities will increase. At the same time competition in this area is intensifying and there are various service providers. With the right kind of commercialization and marketing the sport institute network can emphasize its diverse expertise and conditions that helped attain its competitive edge. Also with commercial services, sport institutes need to identify opportunities for collaboration with other institutes within the network. More than 1,5 million customers walk through the doors of Finnish sports institutes in an annual basis, and this is a huge number of consumers. Therein lies an opportunity to increase sales through a wider variety of services. The network of sports institutes can appear as an attractive and reliable partner for many national companies.

5.5.3 Socio-cultural factors

Social and spiritual needs will be emphasized in the future. Inclusion, participation and social capital will be valued again. Competition for people's leisure time is accelerating in sports and in general.

A new kind of family life shapes and shakes society. Differentiation of family forms adds the need for reform for family leave and legislation. The proliferation of reconstituted families, two-parent families, single-parent families, rainbow families and single-person households forces public services and legislation to recognize different forms of families and their needs. (Finnish Government, 2014b). New generations question old values and goals, which is why intergenerational conflicts are inevitable (National Emergency Supply Agency 2013).

Sport institutes' family concepts and services for new families have to be adapted to meet the demands of modern families.

According to professor Mika Pantzar (2014), the main public health problem in the future in Finland is loneliness. The sport institutes' operating environments and social activities are excellent tools for tackling this disease.

Super Seniors are a huge section of the society and they create new kinds of needs, services, and can be a significant social force. The population is aging rapidly, and Finland is at the forefront of this development. Intergenerational justice is going to be a big political issue in the future. (Sitra 2013.)

Instead of the current reacting policy, social and health services are moving to a prevention policy in the future. One of the industry's main jobs is to support the increasing work and learning community based physical activity. As the average age transition moves to fifties, the focus of well-being needs to be more strongly in self-guided and health supporting physical activity and exercise. The gym boom and personal trainers are first steps. Along with the municipal services a large number of commercial actors joined the provision of services, and their field of activity will expand in the coming decades. (Ministry of Social Affairs 2014).

Super Seniors are a target group for the future, for whom sport institutes need to create different levels of services together with health care and without health care.

International migration will continue to grow as people search for a better life (Hartikainen 2014). Immigration to Finland is increasing and the number of foreign languages and the proportion of immigrant population is growing rapidly. In the Helsinki metropolitan area, every fifth person will be of the foreign language population in 2030 (Vantaan Sanomat 2013). The importance of physical activity and exercise in integrating into a new country and society is globally recognized (eg. United Nations Office of Sport for Development and Peace 2014). Focusing on immigrant population allows the sport institute network to develop its activities and open new possible doors for resources such as EU projects.

In addition to international operations in Finland (especially immigrants), internationality increases in the future even though Finland is a small and geographically remote economy. Participation to European projects opens new doors of opportunities for sport institutes with additional resources and new customer relationships.

Internationalization creates a lot of opportunities for all sectors of sport institutes' activities. The training center activities in international operations have been active but they have to increase in order to secure coaching excellence. As globalization continues to develop, sports institutes can find more and more opportunities in commercial services internationally. BRIC countries of the world dominate the world economy in 2030, and China is the world's economic power (Hartikainen 2014). BRIC countries' culture, people's exercise habits and sales know-how of appropriate services need to be internalized, knowledge of new target groups must be obtained and competent staff need to be hired if market shares want to be obtained.

5.5.4 Technological factors

Technological development, in particular the development of information technology, affects the sport institute network's environment. The use of different techniques in the field of sports is increasing its position. The potential for using technology in particular with education and coaching should be a continuous process with every sport institute.

As electronic environments continue to evolve they offer network marketing, as well as physical education, more and more opportunities. There are plenty of opportunities in the utilization of social media for each of sport institutes' operating sectors.

Digital technology enables new ways of learning and teaching. E-learning will be an integral part of creating and utilizing teaching and learning related networks. It will be used both as collaborative and individual learning support. Internate pedagogy is only one form among many in the education of sport institutes.

5.5.5 Ecological and environmental factors

Sport institutes must meet the requirements of sustainable development in environmental matters. The utilization of green care ideology in selling welfare services is important. People's awareness of ecological and environmental friendliness is increasing and influences purchasing decisions.

Sport institutes' ecological functioning has to be updated in line with the surrounding society and the sports institutes' old infrastructures are partly a challenge for functioning ecologically.

5.5.6 Laws and legislations

Laws of non-formal adult education and sport, both coming into effect in 2015, are significant to the operations of sports institutes. The allocation of lottery funds has a direct impact on sports colleges. Vocational education permits are renewed from the beginning of 2017 and sport institutes have been informed that all nine institutes no longer possess the permission for the education (Association of Sports Institutes of Finland 2014c). Some or many of sports institutes will have to change their profile or update their service portfolio if they lose the permission to organize vocational education in sports.

Most of the sport institutes have been founded by and are owned by a foundation. The new law on foundations, which comes into force in 2015, plays a key role in securing the operations of sport institutes.

Tax legislations also affect the operations of sport institutes substantially.

6 THREE SCENARIOS FOR SPORT INSTITUTES

The operating environment chapters dealt with a number of measures which sport institutes must take to succeed in the future market. The worsening economic situation and the Ministry of Education and Culture's 2.6 billion euro cost-cutting measures by 2017 make commercial services and their development the critical success factor for each sport institute. Commercial services will become a matter of life and death to the sport institutes as education reduces. The first cost-cutting measures will be additional vocational education, followed by the vocational education organizing permits.

Initiatives, activities, and risks must be taken regardless of the scenario. For example, international operations and services for the aging population have to be prepared well. Sport institutes need to raise the level of competence and networking, create services and allocate resources for these operations. To do this, collaboration within the sport institute network results in better chances of success.

In the following sections sport institute network's alternative futures, or scenarios, are described. The scenarios present three different worlds in which the sport institutes are living in the year 2020. Scenarios are not predictions, but offer a point of view of the possible future operational environment in either a strongly networking and cost-effective option (corporation), focusing as regional centers of excellence (locale), or as independent actors (guerrilla). These three different scenarios evolved in a natural way, because sport institutes were very much in favor of these very different perspectives as they presented their perspective to the Ministry of Culture and Education on how the allocation of permits for vocational education in sports should be delivered in the future. Therefore, it was natural to approach all of the sport institutes' operations through these perspectives.

The locale and in particular corporation scenarios are based on the strong co-operation within the sport institute network. Value-adding co-operation cannot be secured if there is no common structure that supports collaboration. After this, it is

easier to start building the network's marketing or the sport institute brand. In the corporation scenario, sport institutes live in a world of constant savings, but through concentration and efficiency they succeed.

In the guerrilla scenario and partly in the locale scenario co-operation within the sport institute network is found to be of no added value, due to the competitive position between sports institutes. Due to the tightening economic situation, competition between the parties reaches new dimensions.

None of the described scenarios are in themselves a target state. Due to the sport institutes' wide range of operations and differences between them, it is likely that in the future parts of all the described scenarios will be seen taking place.

Simultaneously with writing of this thesis, the preparation of vocational education and vocational further education reform is taking place together with the financial and structural reform of the education system, which will determine operational permits for each type of education starting from the beginning of 2017. A Competence-based control mechanism has been planned for the education providers. It is required that the amount of education providers will be lesser than currently. The message from the Ministry of Education and Culture is clear: permits to provide vocational education will be given to a smaller number of sports institutes.

6.1 Corporation scenario

The corporate scenario assumes that selected functions of sport institutes are combined structurally. Sport institutes form a coherent and effective education corporation. The Association of Finnish Sport Institutes operates as a corporation, owned 100 percent by sport institutes. After this option was chosen, strong national co-operation was achieved, which is controlled by the board of the association. In the earlier sport institute network strategies (2007, 2009) strong cooperation was chosen as a strategic goal and form of activity, but concrete cooperation has remained as just words on paper. Now there is a structure to back up cooperation.

6.1.1 Plot 2015-2020

Network-like ways of organizing work have become commonplace between businesses and communities. Operating in a network has diversified job descriptions and recruited multi-skilled workers for sport institutes. All sport institutes have been through staff reduction negotiations, because old job descriptions did not allow today's flexible and multi-dimensional approach to work. Information networks and innovative thinking have made it possible for interactive networking nationally and created innovation operations that the Association of Sports Institutes of Finland started to develop in 2017.

As a consistent and successful education corporation, the sport institute network operates in close cooperation with other education and non-formal adult education providers. As a corporation, the network appears to be more influential partner and attractive cooperation partner. Effective leadership has required network management know-how and knowledge management at the sport institute level.

Operating as a corporation in education was in line with the Ministry of Education and Culture's definition of policy for major education providers and, consequently, this enabled the securing of vocational education in sports at sport institutes. As an operating organization in education, the role and power of the association has grown, and the board has been given a real decision-making and guidance role.

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Operating as one organization, the network has responded more efficiently to the sport institutes specific duties agreed with the Ministry of Education and Culture. Also, the co-ordination of development projects is naturally centralized to save resources and avoid overlap in projects. The Ministry of Education and Culture's control is still strong, but it does not appear so at institute level because the association's role between the parties is significant.

The strong network co-operation of training centers has enabled the taking advantage of training centers' knowledge of sports and applying this to institutes' other activities. At the same time sport institutes' training centers have strengthened their

role as elite sports operators. Even though not all sports institutes have an operational training center, with the help of existing ones, by working together and with joint activities, the sport institute network has become the pioneer of Finnish sports and sports culture.

Sport institutes operating as corporation are an important partner in the national project world, as well as an attractive international partner for European projects. Network projects are favored in the Erasmus projects, National Board of Education projects and the Ministry of Education and Culture projects, and as a corporation representing the network different projects are constantly deployed.

Operating as a corporation in education has also contributed to other sectors of sport institutes' cooperation. As a result of strengthening marketing, sport institutes' commercial services have joint products and a constant collaboration of ideas.

6.1.2 Centralization in corporation

The prerequisite for the corporation scenario is centralization, which is allocated to those activities within sport institutes where value and efficiency can truly be added. Uniform processes, systems and practices have first been completed. By centralizing and outsourcing sport institutes' accounting and payroll, every sport institute has saved in resources and has found synergies between the institutes.

Savings gained from the centralized solution to sport institutes' electricity contracts have enabled hiring of joint staff to marketing. The network has its own marketing unit at the Association of Sport Institutes of Finland, and the unit is responsible for the sport institute brand's marketing and visibility. From the perspective of the client, centralization allowed mutual communication and marketing, as well as joint sales of products.

Customers have been given the center stage and are taken care of much better than before. Sport institutes have their own customer loyalty programs and registers, and after sales marketing is effective.

Consistent production management control systems create reports and statistics for the Ministry of Education and Culture and National Board of Education and make the reporting system more transparent. Other sport institutes' subscribers, such as national sports organizations and the Non-Formal Adult Education Association benefit from a single report system. Mutual reporting and statistics provide tools for lobbying for the sports institute network.

From the perspective of sport institutes, centralization has increased productivity and sales. Sport institutes have a common turnover-increasing business model for each institute. Resources have been released to customer service and the development of commercial services. Mutual operations have increased the attractiveness and awareness of sport institutes.

Centralizing and clustering will continue in the coming years with payroll, human resources, marketing services and procurement activities. Future plans include also the network's mutual hiring of staff for education, and the sport institutes' e-shop.

6.1.3 One corporation as an education provider

According to the Ministry of Education and Culture's press release (13.06.2014), vocational education and further education reform and financial restructuring is intended so that in the future the education provider network consists mainly of multi-sectoral providers of education with strong administrators who have the capacity and ability to specialize in adult education among others. Also, a robust network of administrators was pursued in non-formal adult education, which has fewer administrators.

Thus, the only possibility for sports institutes to be in the competition was to operate as a corporation, and to be included in those institutions with strong capacity and ability to specialize in adult education.

In its strategy the sport institute network applied for one permission to organize vocational education and got it from 1.1.2016. The Association of Sport Institutes of Finland began to co-ordinate basic and further vocational education for sports between sport institutes. The role of the association's board grew immensely.

When one operator began to work as the licensing administrator of all vocational education in sports, the sport institute network began to show itself as a much larger actor and partner. Simultaneously the autonomy of each sport institute decreased.

Under the leadership of the association's board sport institutes prepared for the new defined vocational education permits era, starting in the beginning of 2017. Since the sports industry had been the quickest expanding sector on the basis of applicants to the vocational education since 2010, it was given more starting places for students already in 2018.

In 2017 the network started its first joint on-line courses. For adult education and preparatory education for competence-based qualifications, it has been useful that some of the teaching has not been bound to a place or time.

Negotiations with national partners for students' work placement places have become easier and negotiating access with key partners regionally and nationally has been better implemented.

Since 2015, single and joint entrance exams have been organized for vocational education. This single measure has saved institutes' human resources and has clarified the entry process to applicants. International education and quality projects have brought additional funding for the operation of sport institutes and the Association of Sports Institutes of Finland.

Individual sport institutes' autonomy, operational flexibility and responsiveness have decreased concerning education.

The table below describes the functions of sport institutes in accordance with the corporation scenario.

EDUCATION

Vocational education	Vocational further education	Liberal adult education	Commercial education operations
<p>Sport institutes are a much bigger player as an education provider and partner since licenses have been managed by the association.</p> <p>Due to the great attraction of sport education, sport institutes have received more studying places than in the years 2014-16.</p> <p>Vocational education is taking place in six sport institutes.</p> <p>Regional unified entrance exams for applicants are held annually.</p>	<p>The amount of students has doubled since 2013.</p> <p>Further vocational training is carried out mainly in those institutes who do not have a basic vocational education educator role.</p> <p>Assessor training for competence-based qualifications is done jointly in a controlled manner.</p> <p>Institutes' roles and responsibilities are divided by modules and special characteristics of the institutes. Together with the Ministry profiles were defined in 2016 to create better quality and provide a role of specialization.</p> <p>Cooperation with assessing competence tests is carried out conveniently and cost-effectively, by jointly agreed rules</p>	<p>Status of the basic course in physical education has remained strong.</p> <p>Liberal adult education includes sports federations instructor training, adapted physical activity, physical activity and guidance for the elderly, and children's physical activity courses.</p> <p>Immigrants' integration training is also held in the sports institutes.</p> <p>Personnel in-service training is carried out jointly as part of the network's excellence program.</p>	<p>Commercial services in education have increased in all institutes.</p> <p>Institute-specific specialization in commercial education activities is popular.</p> <p>Institutes implement open market Personal Trainer education.</p> <p>Nationwide partners' (fitness centers, municipalities) fitness professionals training is centrally controlled and produced.</p>

TRAINING CENTERS

Liberal adult education	International operations	Regional centers of excellence	Other
Institutes' partner federations are in focus	Commercial services for international partners in training centers have increased due to the network's joint international project.	Strong network cooperation has enabled sport institutes to take advantage of the sports and coaching skills of training centers in institutes' other operations.	Training centers' staff's further training is done jointly through the network's excellence program.

LEISURE-TIME OPERATIONS

Liberal adult education	Families	Elderly	Other services
<p>Some of the institutes have been given responsibility for the integration training of immigrants. State funded study grants are used also for sport institutes.</p> <p>Physical education students are actively participating in the institutes' liberal adult education courses and other operations on a regular basis.</p> <p>Physical education services sector staff's further training is done jointly as part of the network's excellence program.</p>	<p>Competition of families' free time is still intense.</p> <p>Sport institutes as domestic alternatives have been able to sell themselves as upper middle class family vacation destinations.</p>	<p>As the population is aging, sports institutes have started implementing a mutual product portfolio to the "Super Seniors".</p> <p>Acting as a network has brought a number of national corporate partners to join the sport institute network.</p>	<p>Listening to customers and responding to their wishes has increased due to added resources.</p> <p>The network has profiled itself as a center of excellence in health-enhancing physical activity, physical activity counseling and sports services producer.</p> <p>The network has taken advantage of national and regional projects targeting nature tourism, which has increased in popularity and is particularly attractive for international consumers.</p>

ASSOCIATION OF SPORT INSTITUTES OF FINLAND

The role of the association as a network strategy developer has been emphasized. In practice, the association partly carries out the tasks of the institutes: owns permits for vocational education and manages and co-ordinates the vocational education with institutes. In addition to education, the well-being of Finnish society has become a major target of lobbying. Board members receive compensation for their task, and spend a significant amount of time on the task. Due to a wide field of operations, the role of the board is divided by competence to the following: education, lobbying and projects, products, competitive bidding, marketing and communication, and human resources and staff.

Sport institutes' development projects (Ministry of Education) are also centrally coordinated by the association. This is to avoid any overlapping of functions and this way institutes are connected directly to the stakeholders (federations, clubs, etc.).

The number of employees in the association has grown to four. The executive director is responsible for lobbying, international projects, economy and human resources, and is the rapporteur to the board. The education co-ordinator is responsible for education activities, the management of vocational education, and co-ordinating the network's staff in-service training. The project designer is responsible for development projects, Erasmus + projects, other projects and the association's website. The marketing designer implements sport institutes' brand marketing. The association regularly employs civilian personnel and physical education students in its operations.

6.2 Locale scenario

The locale scenario's premise is the decision that sport institutes promote themselves as regional centers of excellence. Generally, only training centers are considered national operators. Sport institutes have had the role of regional actor also in the past, but now it's a lot stronger. In the past, regionalism has not been reflected in the education activities in as big a way as it is now.

6.2.1 Plot 2015-2020

Immediately after the 2014 sport institute network strategy process sport institutes started working to profile themselves as co-ordinators of regional activities in the organization reform of sport in Finland. The process was strongly guided by the

Ministry of Education and Culture, national sports organization VALO and the Olympic Committee. Along with the process, the role of sport institutes was focused on regionalism. In accordance with the KPMG's report (2014), sport academies, sports institutes and training centers combined regional competence network, to which parts of the regional sports federations operations were incorporated. Regional centers are knowledge networks that operate in both training and testing developers and distributors of this know-how. Centers operate also as centers of physical activity and as regional trustees for sports. Cooperation with local authorities is close, many sport institutes are responsible for municipal sports activities, and all institutes are involved in producing well-being strategies in their region. Sport institutes' focus has shifted from education organizations to physical activity and training centers. Overlaps with regional sports associations have been removed. In some areas the operations of regional associations have been merged into a sport institute, now a regional center of excellence.

Some of the sports institutes' administrative and support operations have been centralized, and the combined functions are implemented on institute and regional basis in different sports institutes with their regional partners.

In the beginning of 2017 the authorization to provide vocational education in physical education was given to joint municipal authorities, and sports institutes were divided into regions according to their location. As part of the intensification of operations, all national sports institutes were made regional sports centers, including Virpiniemi Sports Institute, Eastern Finland Sports Institute and Norrvalla Sports College.

As sports institutes have invested in profiling regionally, they have become specialized experts in regional sports operations, particularly in elite sports and organizational activities in the area. Training centers' strong position as sports academies and their coaching expertise is indisputable. Co-operation with local municipalities has been emphasized in the actions of sports institutes.

As regional players, sports institutes operate flexibly on different projects, but only as a network on national projects. As institutes increasingly emphasize regional operations, the network co-operation diminishes. European Social Fund projects have been successful for additional resources.

The role of the Association of Sports Institutes has increased in steering the activities of the network, as well as lobbying through jointly defined responsibilities. The Ministry of Education and Culture's monitoring of sports institutes' operations is still strong. The autonomy and resources for sports institutes' education services disappeared as the authorization to provide vocational education in physical education was handed to large joint municipal authorities.

6.2.2 Regional centers of excellence as education and training providers

Instead of one authorization permit for vocational education in physical education, permits were given to different regional co-operation networks, regionally handed out by the Ministry of Education and Culture. Regional partner networks consist of sports institutes and other operators, such as folk high schools, vocational colleges or polytechnics.

The number of authorization permits to organize vocational education in physical education has been reduced to five, one per region. Host authorization holders offer comprehensive training regionally in co-operation with their regional partners.

At the regional level sports institutes specialize in the roles defined with the Ministry of Education Culture, and specialize in those tasks also nationally.

The five regional centers of excellence are: Southern Finland: Solvalla, Kisakallio and Kisakeskus, Western Finland: Varala, Norrvalla and Kuortane, Central Finland: Eerikkilä, Pajulahti and the Vierumäki, Eastern Finland: Tanhuvaara and ISLO, and Northern Finland: Vuokatti, Virpiniemi and Santa Sport.

In the regional centers of excellence qualifications have been divided into modules between regional partners, and this deepened specific knowledge in these specializations. Coherent regional entrance exams are held regionally in vocational education.

Mutual products and shared expertise have been created in liberal adult education. The Ministry of Education and Culture's goal for liberal adult education for the year 2014 was to create sufficiently large free adult educational institutions. Therefore, the regional centers of expertise consist of several sports institutes and other education providers.

Each sports institute makes choices in education depending on its skills, interests, and in particular, its specialization. Commercial education activities are of great importance to all sports institutes.

6.2.3 Regional training centers of excellence

Training centers have specialized in the Finnish Olympic Committee's programs (knowledge, sports academy, and the peak phase program) in the regional and local levels. Each training center has mainly regional tasks such as sports clubs' education and training, testing, and organizing camps, competitions and tournaments.

Strong network co-operation has enabled better ways of taking advantage of training centers' sports skills in other operating sectors of sports institutes. The training centers' position as top players in Finnish sports has been strengthened.

The table below describes the functions of sport institutes in accordance with the locale scenario.

EDUCATION

Vocational education	Vocational further education	Liberal adult education	Commercial education services
<p>Regional multidisciplinary networks are collaborating (joint hiring, procurement).</p> <p>Qualification modules are divided between sports institutes and partner institutions. It is increasing specialization and deepens institute-specific knowledge.</p>	<p>Qualification modules are divided between sports institutes and partner institutions also in further education. It is increasing specialization and deepens institute-specific knowledge.</p> <p>Imposed roles have brought more quality to all operations.</p>	<p>In each region, one of the sports institutes organizes a basic course in physical education.</p> <p>Liberal adult education includes sports federations' and local clubs' instructor training, adapted physical activity, physical activity and guidance for the elderly, and children's physical activity courses.</p>	<p>Commercial services in education have increased in all institutes.</p> <p>One institute per region implements open market Personal Trainer education.</p> <p>Regional partners' (fitness centers, municipalities) fitness professional training is centrally controlled and produced in the region.</p>

TRAINING CENTERS

Liberal adult education	International operations	Regional centers of excellence	Other
<p>Scarcer resources are forcing institutes to focus operations for partner clubs and federations in the region.</p> <p>Competition for partner sports federations is fierce between training centers.</p>	<p>Commercial services for international partners have increased through regional projects and a joint international project of the network.</p>	<p>Tasks include local sports clubs' education and training, testing, organizing camps, competitions and tournaments.</p> <p>Strong network cooperation has enabled sport institutes to take advantage of the sports and coaching skills of training centers to benefit institutes' other operations.</p>	<p>Nationwide operations have declined and daily activities increased.</p> <p>Regionalism does not serve all sports institutes: four training centers have gone out of business.</p>

LEISURE-TIME OPERATIONS

Liberal adult education	Families	Elderly	Other services
<p>Due to regional emphasis institutes operate mainly as sports clubs' and sports federations' training camp and education centers.</p> <p>Each region has been given responsibility for immigrants' physical training, which is made possible by training vouchers from the state.</p>	<p>Competition for families' free time is intense.</p> <p>Sports institutes as domestic alternatives have been able to profile themselves as upper middle class family vacation destinations.</p> <p>Customers will not select family holidays on a regional basis. Price, recommendations, services and location matter the most.</p>	<p>As the population is aging, sports institutes have started implementing regional product portfolios for the "Super Seniors".</p> <p>Some of the institutes profile strongly as a leisure-time service rather than a training center.</p>	<p>Listening and responding to customers' wishes is vital.</p> <p>Institutes have taken advantage of national and regional projects targeting nature tourism, which has increased in popularity and is particularly attractive for international consumers.</p> <p>Physical education students are actively participating in institutes' leisure-time operations on a regular basis.</p>

ASSOCIATION OF SPORTS INSTITUTES OF FINLAND

The association's role as the implementer of the network strategy has increased. The association implements supportive activities and common products in the sports institutes. The association's main task has shifted from education policy to supporting sports institutes' commercial services.

Board members are appointed by the Ministry of Education and Culture's determined regional mandates, one board member per area.

The number of employees in the association has grown to two. The executive director is responsible for lobbying, economy, international projects and marketing, and works as the board's rapporteur. The designer is responsible for the development of commercial services, web pages and projects. The association regularly employs civilian personnel and physical education students in its operations.

6.3 Guerrilla scenario

The starting point of the guerrilla scenario is that sports institutes will continue to operate as independent operators; even more independent than in the past. Sports institutes could not find a common solution for the authorization to provide vocational education, even though this was what the Ministry of Education and Culture had hoped. The disagreement was so great that even regional cooperation is not taking place. Sports institutes perceive each other as their biggest competitors, making co-operation impossible. The Association of Sports Institutes of Finland's role will continue as in 2011-13, though with scarcer resources.

“Guerrilla is wilderness, intelligence and a pioneering talented soldier. Guerrilla’s battle actions are either individual performances or small group activities. Guerrilla is a skilful player who will do well as an independent actor.”

- Wikipedia

6.3.1 Plot 2015-2020

Sports institutes decided in the 2014 strategy process to continue operating as independent actors under the guidance of their owners. The network's activities have continued similarly through the entire period of its existence: the network is operating, but real mutual operations are not realized. Partnerships between individual institutes have increased and they have proved to be fruitful.

Sports institutes' roles are illustrated to the network through competency profiles, mutually agreed with the Ministry of Education and Culture.

The sports institute network acts as a distributor of information, but the tough economic competition between institutes has adversely affected the co-operation of the network.

Most of the sports institutes have lost the authorization to provide vocational education and they are strongly oriented towards sports and coaching. New productive opportunities have also been found for risk-taking sports institutes from the health

& fitness sector. Institutes have had to take risks in commercial services and some of the institutes have been successful, while others have paid a high price.

Sports institutes take advantage of the regional co-operation possibilities with other training providers, but the benefits of co-operation to the network remain partial.

Sports institutes operate flexibly in different projects as independent actors but national projects are only possible as a network. European Social Fund projects have been successful for some of the sports institutes.

As independent actors, institutes are able to work quickly and flexibly with new partners. Sports institutes located in the city centers and those who invest in marketing are successful.

The government's cost-cutting measures, started in 2015, have cut off parts of the activities of the sports institutes or have forced institutes to focus only on specific sectors. With regard to the cuts, educational activities have suffered the most.

Sports institutes were made regional centers of excellence in sports. Only Olympic training centers have national tasks. Staff reduction and other reductions in operations have been extensive in all sports institutes. Educational activities are developed mainly independently. Customer orientation, innovativeness, and sensitivity to the situation are key elements of the business. Some of the institutes succeed in spite of the economic situation. The amount of sports institutes is now nine. Two have been abolished.

Despite of the developed lobbying of the Association of Sports Institutes of Finland, the role of the association has decreased, because resources are not allocated for network activities. The association's effectiveness is therefore limited.

6.3.2 Individual sports institute as an education provider

The Ministry of Education and Culture issued the provision of vocational education in physical education to regional entities led by the regions' largest education providers in the beginning of 2017. Through this decision, sports institutes' resources have been first reduced, and then removed totally in 2020. The change of vocational education provision in physical education to the large education providers was based on the performance management mechanism, which was copied from the streamlining of polytechnics and universities. Sports institutes still organize physical education training as they provide the education as purchase services for large education providers. Education is implemented by one sports institute in each of the Ministry of Education and Culture's five regions. Sports institutes' teaching staff has fallen to half of what it was in 2014.

Because vocational education is organized as part of larger education units, the autonomy of sports institutes is lost. There is even more demand for cost-effectiveness. Further vocational education and commercial education services are the main focus points of education in sports institutes.

Competition between sports institutes also in the educational field prevents sustainable co-operation. Carrying out joint education projects and nurturing the quality of education have weakened ever since the authorization to provide vocational education was lost.

The lobbying of education and other sports institutes' functions are carried out independently and through the Association of Sports Institutes of Finland.

6.3.3 Independent training centers

Independently operating sports institutes become independent also in training center operations. Those training centers who enjoy the Olympic Committee's support have access to external resources, international projects, and strengthen their operations significantly.

Competition for obtaining sports federations as customers is fierce and test the sports institutes' relationships. Those who receive trustworthy sports federations as customers are strong.

Polarization is growing and small federations and those federations who do not have partner contracts with sports institutes use sports institutes' services less and less.

Those sports institutes that operate with big sports federations can provide significant development projects with federations and their clubs, and thus strengthen their position. Due to regionality, part of the sport institutes will also lose their regional center of excellence status because in scattered areas operations wither.

Operating as regional centers of excellence, sports institutes have expanded their training center operations in those areas where there is a demand. These areas include club instructor and coaching training, club volunteer and leader training and supportive services for training such as nutrition, physical exercise and athletes' treatments. This has also demanded an increase of knowledge from the training center staff.

The table on the next pages describes the functions of sport institutes in accordance with the guerrilla scenario.

EDUCATION

Vocational education	Vocational further education	Liberal adult education	Commercial education services
<p>One of the region's sports institutes provides education to the joint municipal authority that owns the authorization to provide education.</p> <p>Resources for the implementation of education have decreased and continuous cost-effective operations are part of daily activity.</p>	<p>The role of further vocational education is the focus in education.</p> <p>Competition between institutes' division of work, roles and profiles is unclear in spite of Ministry of Education and Culture's guidance.</p> <p>Large education corporations are competitors in all education.</p>	<p>The four-month basic course in physical education is a highly competitive product. Courses are tailor-made to support different skills and areas (physical education, nursing, learning techniques, etc.).</p> <p>Otherwise, liberal adult education specializes in the sports institute-specific profiles, family courses and immigrant integration through physical education etc.</p>	<p>Autonomy of the sports institutes enables flexible operational planning and some institutes with successful commercial education services survive.</p> <p>In the competitive Personal Trainer education field, individual colleges as independent actors alone cannot compete with the skills of long-term entrepreneur-driven operators.</p>

TRAINING CENTERS

Liberal adult education	International operations accelerate in Olympic training centers	Regional training centers	Other
<p>Scarcer resources are forcing institutes to focus operations on partner clubs and federations.</p> <p>Competition for partner sports federations is fierce between training centers.</p>	<p>Commercial services for international partners increase in Olympic training centers through the Olympic Committee's international operations.</p> <p>Staff with international networks are valuable operators for sports institutes.</p>	<p>Training centers are divided into nationwide Olympic training centers and regional training centers. Along with sports institutes other active players will be offering training center services.</p> <p>Olympic training centers are successful, some institutes get significant roles as regional operators and some will be left without a decent mandate.</p>	<p>All sports institutes are no longer offering training center operations.</p> <p>Clubs' camps and tournaments are popular.</p>

LEISURE-TIME OPERATIONS

Liberal adult education	Families	Elderly	Other
<p>Cuts in government subsidy for liberal adult education has resulted in institutes providing only half of the 2014 amount of liberal adult education.</p> <p>Competition against spas and other networks is fierce, even though there is some financial support from the state.</p> <p>Physical education students are actively participating at institutes' leisure-time operations on a regular basis.</p> <p>Joint products for the entire network cannot be achieved.</p>	<p>Competition for families' free time is intense.</p> <p>Sports institutes as domestic alternatives have been able to profile themselves as upper middle class family vacation destinations.</p>	<p>As the population is aging, sports institutes have started implementing regional product portfolios for the "Super Seniors".</p> <p>Customer-oriented customized services are emphasized. There must be more than just physical exercise and sports.</p>	<p>As independent operators, institutes are able to react quickly to the new products and partnerships in fitness and nature tourism sectors.</p> <p>Listening and responding to customers' wishes is vital.</p> <p>Some institutes will continue to co-operate with each other to form small partnerships.</p> <p>All institutes have increased commercial services for companies.</p> <p>Institutes' own special services are developed with limited resources.</p>

ASSOCIATION OF SPORTS INSTITUTES OF FINLAND

The association's role in implementing a network strategy is nominal. It operates joint projects for those institutes that want co-operation.

The association operates as the network's information distributor, but the competition between institutes, due to tough financial times, has weakened the value-adding co-operation. Competition between universities is fierce.

Board members are chosen annually at the association's annual meeting.

The number of employees in the association is one. The secretary-general is responsible for the activities of the association (lobbying, finance, mutual products, website and projects), and works as a rapporteur to the board. The association regularly employs civilian personnel and physical education students in its operations.

The guerrilla scenario can be everything between the two following extreme descriptions:

- 1) SWOT analysis for sports institute network's education operations, threats section (Association of Sports Institutes of Finland, 2014c): in the increasingly scarce resources sports institutes do not believe in themselves and continue their journey in the ragged way competing each other to death.
- 2) As independent actors sports institutes have established their local position as physical activity, sport and education operators. Sports institutes' local autonomy enables flexible operational planning and fast reaction to new opportunities.

7 SUMMARY

In the midst of major changes, the scenario method can be used to outline a variety of possible conditions in the near future. The scenario method has been designed to produce help and assistance for the sports institute network by adding information about the future and the related options.

This thesis has described changes in the sport institutes' operating environment, and the three possible scenarios for the near future. At their best, scenarios work as the eyes to the future and transport the actions of today onto a larger scale. The corporate scenario described a bright future in which the essential part is the structural form of cooperation by establishing a corporation for the mutual functions and especially the educational services of sports institutes. In the locale scenario, where sports institutes promote themselves as regional players, the essence is regional partnerships. In the guerrilla scenario sports institutes continue as even more independent actors as ever and the future looks mostly bleak, because network synergies remain unexploited and the rivalry between sports institutes increases.

Centralization and cost-effectiveness of the operations face sports institutes in any case, as the state funding and in particular the Ministry of Education and Culture's cuts are massive and affect all sports institutes. Commercial services should be fully active in all sports institutes, and planning ahead a constant process in order to build a sustainable future.

Sports institutes' future success depends on the commitment of the network and joint activities. Continuing as independent actors does not carry far, as institutes are too small to succeed on their own.

Many sports institutes' industries, such as leisure-time health-enhancing physical activity, need initiatives, piloting, the allocation of resources and expertise, and risk-taking in order to obtain the role of promoter in that industry. Active anticipation is needed. Without choices and joint resourcing the sports institute network's new strategy will not get far.

Further investigation of the sports institutes' scenario of 2020 could be the review of the situation in 2018 or 2019. At that time, authorization to provide vocational education has been in place for some time, the network and institutes have had to make choices for joint operations, and some sports institutes have had to build a new profile instead of being educational institutions.

Jeremy Bentham from Shell (2008) hits the nail on the head with his question, ever so important for the management of every sport institute: what should we do in the next five years to help prepare for, or shape, the turbulent times ahead?

The operating environment is constantly changing. Changes offer threats and opportunities. It is up to the sports institutes how to adapt to changes.

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