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Skills4Sports

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

A.3.2.1

Situation Analysis and Report

WP3 – Research & Tools Development



The project is funded by the EU under the
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GREECE

SITUATION ANALYSIS REPORT

within the project Skills4Sports

Athens

2021

1 Introduction

This Situation Analysis Report has been designed in the framework of the ENI CBC MED project “Skills4Sports” which aims to increase the employability of NEETs in the Mediterranean area by tackling the skills gaps for the Sports Sector. The analysis will be used as a tool for the Project Partners to better understand what the current situation in their region is in regards to the skills development and the employment requirements in the sports sector in the Greece proper.

As a result, for conducting this report, a clear, detailed and realistic picture of the opportunities, resources, challenges and barriers regarding the sports skills development in the sports sector is going to be reported for the Greece proper. The thematic focus is especially on the current situation in Greece, on the legal framework and on the public support.

1. *Skills4Sports framework*

In the MED region youth unemployment is twice as high as adult unemployment. In the Southern Mediterranean, young people are three times more likely to be out of a job (ILO,2017). Contrarily, prominent sectors, like the sports industry, face challenges finding the right skills for their rising needs. The European Association of Sports Employers and the UNI Europa Sports (European trade union federation), both observe skills shortages and mismatches, along with gender inequality in the sector. Furthermore, the Union for the Mediterranean has identified digital skills as a key for employability in the region, especially for NEETS and youth. The sports sector is thus in need for more skilled employees and at the same time capable to offer opportunities to the NEETS and youth. The sports industries of the Mediterranean region are showing significant rise in employment. The highest Annual Average Growth Rates, between 2012 and 2017, were observed in Greece (+19%), and Malta (+12%), accounting for 0.8% of total EU employment, with 4 in 10 workers being aged 15-29. The identical challenges and characteristics of the NEETS of the Mediterranean, as well as the frequent mobility of athletes and sports professionals, call for a cross-border approach to reduce the skills gap, offering new career opportunities.



Skills4Sports aims to increase the employability of NEETS of the Mediterranean area by cultivating new professionals for the thriving Sports sector, reducing the mismatch of skills and involving key stakeholders in the process. The project will strengthen multilateral cross-border cooperation between social and solidarity economic actors of participating regions thus creating better perspectives for social inclusion through increased employability, of NEETS. Both the training opportunities offered by the project, and the support network, "Strategic Alliance for Skills4Sports", will contribute to a matured working environment in the sports industry of the region. Increased capacities of the available workforce will lead to better jobs that offer even more opportunities.

The conduction of the regional reports by each Project Partner is essential and will become the baseline on which the Skills Gaps Analysis will be based on. The present report focuses on the description and analysis of the situation in Greece.

2. *METHODOLOGY*

The main methodology for the conduction of the Situation Analysis Report for the Greece proper has been based on the following four methods:

- Desk research
- Online survey with stakeholders and beneficiaries of the project
 - Interviews with Stakeholders and beneficiaries of the project
- SWOT Analysis report
- PESTLE Analysis report

In the first sections of the report, a desk research will be conducted, describing the current situation in Greece (situation analysis), as in the last sections, the main findings and key information from the online survey will be presented. Finally, the conclusions concerning the actions that should be carried out in order for the sports sector in Greece to be developed, will be described in the last section of the report.

1. *Key words*

To better understand the situation in Greece and to address the problem, a literature review is needed to be conducted.

Before continuing with the desk research and the state of the art of the skills development in the sports sector, the key definitions used throughout this methodology will be introduced. These key definitions are used to look for literature that fits within the scope of the Situation Analysis Report, including existing quantitative and qualitative data about the problem and the number of people/organizations affected.

NEETs

NEET is an acronym for 'not in employment, education or training', used to refer to the situation of many young persons aged between 15 and 29, in Europe. The aim of

the NEET concept is to broaden understanding of the vulnerable status of young people and to better monitor their problematic access to the labour market (Eurofound).

Key Stakeholder

An individual, group, or organisation that might affect, be affected by, or perceive itself as affected by a decision, activity, or outcome of a project (PMBOK Guide, 2017). Stakeholders also may exert influence on the project, project deliverables, or the team in order to satisfy their own agenda.

Skills development

The process of identifying the skill gaps, and developing and honing these skills. It is important because skills determine the ability to execute any plans with success.

Sport sector/ industry

Sport industry is an industry in which people, activities, business, and organizations are involved in producing, facilitating, promoting, or organizing any activity, experience, or business enterprise focused on sports.

2. Online survey

For the needs of the present report, an online survey has been conducted along with the desk research, providing valuable information about the situation in Greece by receiving the feedback of the participants. The participants of the survey were the Key Stakeholders and Final Beneficiaries that have been mapped during the A3.1.1 and A3.1.2.

More specifically, in the context of the present Situation Analysis and Report, the following actions have been implemented:

1. Physical interview with the Director of the Physical Education in the Greek Ministry of Education, one of the most important stakeholders in Greece
2. Two questionnaires have been answered by key stakeholders and final beneficiaries of Skills4Sports

The main results and findings of the above will be used in the last sections of this report, as well as in the Annex 1 and Annex 2 for the conduction of the SWOT and PESTLE analysis.

3. PORTRAIT OF THE LOCATION

Greece is a European country located at the southern end of Europe and on the southern tip of the Balkans (**Figure 1**). It lies on the Mediterranean Sea having the longest coastline on the Mediterranean basin and is located at the crossroads of Europe, Asia, and Africa. Greece has been a member of the European Union since the 1st of January 1981 and its current official currency is the Euro.



Figure 1: Map of Greece (2014, Maps of Europe).

The capital of Greece, Athens, is the biggest city of the country followed by Thessaloniki. Its population is 10.388.113 people (Worldometer, March 2021) with a population density of 81 per Km² and a total land area of 128.900 Km².

4. NATIONAL KEY FACTS AND OVERALL DATA

1. Political system

Greece is considered the cradle of Western civilization, being the birthplace of democracy, Western philosophy, Western literature, historiography, political science, major scientific and mathematical principles, Western drama and the Olympic Games.

Greece is a parliamentary republic where the nominal head of state is the President of the Republic, who is elected by the Parliament for a five-year term. The political system is based on social justice, the rule of law, the international legitimacy and law and the European acquis. The head of government is the prime minister who has the most political power. Legislative powers are exercised by a 300-member elective unicameral Parliament.

2. Geographical system

Greece is located at the southeastern tip of Europe, bordering Bulgaria, North Macedonia and Albania to the south, and Turkey to the east. It is washed by the waters of Mediterranean Sea and is surrounded on the east by the Aegean Sea and on the west by the Ionian Sea owning more than 2500 islands. The country mostly consists of a mountainous, continental peninsula, which flows into the Mediterranean Sea at the southern tip of the Balkans, has rugged mountains, forests and lakes. The climate of Greece is characterized by mild winters and long, hot and dry summers.

Mainland Greece covers about 80% of the total territory and is largely mountainous. The largest mountain range of Greece is the Pindus range, the southern extension of the Dinaric Alps, which forms the spine of the Greek mainland, separating Epirus from Thessaly and Macedonia. The country's tallest mountain is Mount Olympus, which also

separates Thessaly from Macedonia. Its highest peak rises to 2,918 meters above sea level, making it the second highest of the Balkan peninsula.

The geographical classification of Greece consists of 13 Regions - nine on the mainland and four island groups - which are further subdivided into 74 regional units and 325 municipalities (*Table 1*).



Figure 2: Regions of Greece.

Name of the Region	Seat
Attica	Athens
Central Greece	Lamia
Central Macedonia	Thessaloniki
Crete	Heraklion
Eastern Macedonia and Thrace	Komotini
Epirus	Ioannina
Ionian islands	Corfu
North Aegean	Mytilene
Peloponnese	Tripoli
South Aegean	Ermoupoli
Thessaly	Larissa
Western Greece	Patras
Western Macedonia	Kozani
(Monastic Republic of Mount Athos)	Karyes

Table 1: The regions of Greece.

3. *Economic system*

The most important sectors of Greece's economy are tourism and merchant shipping. About 20 million international tourists visit Greece every year, which makes it the 7th most visited country in the EU and the 16th in the world. As for merchant shipping, Greece has the largest merchant marine in the world as it covers 16% of the world's total capacity.

A developed country, Greece economy is based on the service sector (85%) and industry (12%), while the agricultural sector consists only 3% of the national economic output. In the last years, the country faced a severe debt crisis and had many challenges to face, such as the low rate of development and large unemployment.

LAND, PEOPLE AND ELECTORAL CYCLE					
Population (million, 2018)	10.7		Population density per km ² (2018)	83.3	(37.8)
Under 15 (% , 2018)	14.1	(17.8)	Life expectancy (years, 2018)	81.3	(80.2)
Over 65 (% , 2018)	21.7	(17.1)	Men (2018)	78.8	(77.6)
Foreign born (% , 2017)	6.0		Women (2018)	83.9	(82.8)
Latest 5-year average growth (%)	-0.4	(0.6)	Latest general election	July-2019	
ECONOMY					
Gross domestic product (GDP)			Value added shares (% , 2018)		
In current prices (billion USD)	209.9		Agriculture, forestry and fishing	4.3	(2.5)
In current prices (billion EUR)	187.5		Industry including construction	17.5	(27.3)
Latest 5-year average real growth (%)	0.9	(2.2)	Services	78.2	(70.2)
Per capita (000 USD PPP)	30.4	(46.4)			
GENERAL GOVERNMENT					
Per cent of GDP					
Expenditure (OECD: 2018)	46.2	(40.3)	Gross financial debt (OECD: 2017)	200.6	(109.0)
Revenue (OECD: 2018)	47.7	(37.3)	Net financial debt (OECD: 2017)	145.2	(69.1)
EXTERNAL ACCOUNTS					
Exchange rate (EUR per USD)	0.89		Main exports (% of total merchandise exports)		
PPP exchange rate (USA = 1)	0.56		Mineral fuels, lubricants and related materials	31.2	
In per cent of GDP			Manufactured goods	14.9	
Exports of goods and services	37.2	(54.2)	Food and live animals	14.1	
Imports of goods and services	37.2	(50.4)	Main imports (% of total merchandise imports)		
Current account balance	-1.4	(0.3)	Mineral fuels, lubricants and related materials	26.0	
Net international investment position	-151.1		Machinery and transport equipment	18.4	
			Chemicals and related products, n.e.s.	15.5	
LABOUR MARKET, SKILLS AND INNOVATION					
Employment rate (aged 15 and over, %)	43.0	(57.5)	Unemployment rate, Labour Force Survey (aged 15 and over, %)	17.3	(5.4)
Men	51.7	(65.6)	Youth (aged 15-24, %)	35.2	(11.7)
Women	34.9	(49.9)	Long-term unemployed (1 year and over, %, 2018)	13.6	(1.4)
Participation rate (aged 15 and over, %)	51.9	(60.5)	Tertiary educational attainment (aged 25-64, %, 2018)	31.7	(36.9)
Average hours worked per year	1 956	(1734)	Gross domestic expenditure on R&D (% of GDP, 2017)	1.1	(2.6)
ENVIRONMENT					
Total primary energy supply per capita (toe, 2018)	2.1	(4.1)	CO2 emissions from fuel combustion per capita (tonnes, 2018)	5.7	(8.9)
Renewables (% , 2018)	13.0	(10.5)	Water abstractions per capita (1 000 m ³ , 2018)	1.0	
Exposure to air pollution (more than 10 g/m ³ of PM 2.5, % of population, 2017)	99.6	(58.7)	Municipal waste per capita (tonnes, 2017, OECD: 2018)	0.5	(0.5)
SOCIETY					
Income inequality (Gini coefficient, 2017, OECD: latest available)	0.319	(0.322)	Education outcomes (PISA score, 2018)		
Relative poverty rate (% , 2017, OECD: 2016)	12.6	(11.6)	Reading	457	(489)
Median gross household income (000 USD PPP, 2017, OECD: 2016)	13.7	(23.9)	Mathematics	451	(492)
Public and private spending (% of GDP)			Science	452	(491)
Health care (2018)	7.8	(8.8)	Share of women in parliament (%)	20.7	(30.7)
Pensions (2015)	17.0	(8.5)	Net official development assistance (% of GNI, 2017)	0.2	(0.4)
Education (% of GNI, 2017)	3.1	(4.5)			

1. Where the OECD aggregate is not provided in the source database, a simple OECD average of latest available data is calculated where data exist for at least 29 member countries.
Source: Calculations based on data extracted from the databases of the following organisations: OECD, International Energy Agency, World Bank, International Monetary Fund and Inter-Parliamentary Union.

Figure 3: Basic characteristics of Greece 2020 (OECD Economic Surveys: Greece 2020).

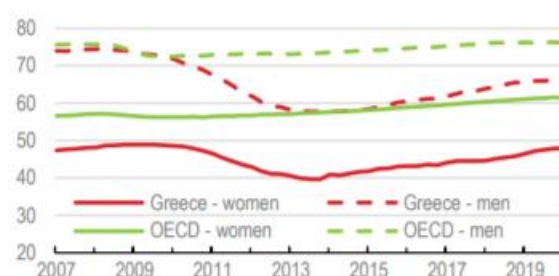
COVID-19 economic effects

Before the pandemic hit, the Greek economy had been expanding for over three years at just below 2% average annual growth. Structural reforms, high primary budget surpluses and debt measures by European Union had sustained Greece's recovery and

rebuilt confidence. Rising goods and tourism exports had supported growth and jobs, reducing unemployment.

COVID-19 has exposed Greece to serious travel restrictions that affected and continues to affect a huge part of the economy that relies on the tourism. Due to the strong concentration of tourism in the summer months, even a short prolongation of restrictions could have a strong downward effect. Moreover, the impact of the crisis on the large service sector and on micro-enterprises, which are more vulnerable, could be larger than expected and hold back the recovery.

The COVID-19 shock risks exacerbating Greece's long-standing labour market challenges. The employment rate has increased over the past six years but is still one of the lowest among European countries. Women and the young people continue suffering from low employment rates (**Figure 4**). The lack of prospects has pushed many talented young people to emigrate, lowering the country's entrepreneurial and innovation potential. Difficulties of integrating migrants into the labour market and education system together with limited support from the EU countries to deal with the large influx of asylum seekers compound these challenges. The COVID-19 crisis aggravating these problems as job growth has collapsed and a large number of discouraged job seekers have left the labour force. Poverty and material deprivation, while improving, are high, especially among the young and families (**Figure 5**).



Source: OECD Main Economic Indicators database.

Figure 4: Employment rates.

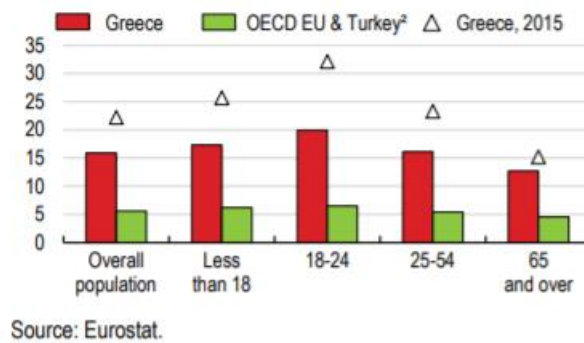


Figure 5: Poverty rates.

In recent years Greece has exceeded its fiscal targets and the current account deficit has narrowed. Increased revenues and better control of expenditure contributed, before the pandemic outbreak, to sustained and substantial primary budget surpluses, rebuilding fiscal credibility. Greece has successfully returned to the international bond market and rating agencies have raised its sovereign rating. The economy has become more open, although the COVID-19 shock is projected to hinder export growth.

4. *Population factors in Greece*

Since 2005, Greece has experienced a population decline, dropping from 11.23 million people to 10.42 million in 15 years. The most recent projections show a continuation of this decline, resulting in a population of 9.03 million by 2050 and 6.61 million by 2099.

From 2019 to 2020, Greece's population declined 0.48%, losing over 50,000 people. The main reasons for Greece's population declining are a very low fertility rate of 1.3 births per woman, financial crisis, emigration, and an aging population. The decline in the birth rate can be caused by education levels, the economic crisis, women's unemployment, and the government's inability or unwillingness to encourage fertility.

With fewer people in Greece, there is less economic stimulation, fewer people working due to an aging population, and more people emigrating to other nations, creating a cyclical effect on the population decline.

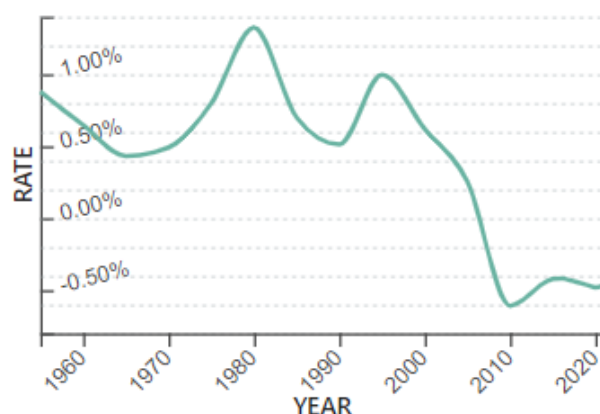


Figure 6: Greece population growth rate (World Population Review).

Greece is currently experiencing a declining birthrate, with hospitals reporting 10% fewer births in the past 4 years. Officials say that families simply can't afford to have children. The number of live births in the country has fallen nearly 15% and it's been unparalleled in Europe, highlighting the true impact of cost-cutting measures in the country that is at the heart of the Eurozone's financial problems.

1. Resident Population by gender and age group 2011 Population - Housing Census			
Age group	2011		
	Total	Male	Female
Total	10,816,286	5,303,223	5,513,063
0 - 9	1,049,839	537,220	512,619
10 - 19	1,072,705	552,173	520,532
20 - 29	1,350,868	696,744	654,124
30 - 39	1,635,304	827,542	807,762
40 - 49	1,581,095	781,112	799,983
50 - 59	1,391,854	677,018	714,836
60 - 69	1,134,045	543,421	590,624
70 - 79	1,017,242	456,247	560,995
80 +	583,334	231,746	351,588

Figure 7: Greece resident population by gender and age (ELSTAT).

It's easy to point to the current Eurozone Crisis which is affecting Greece and other countries across the world. As a result, it may be simple to deduce that fewer foreign nationals are coming to set up home here. The country has often been seen as a haven

for migration but the numbers involved may not be as significant as some have thought¹.

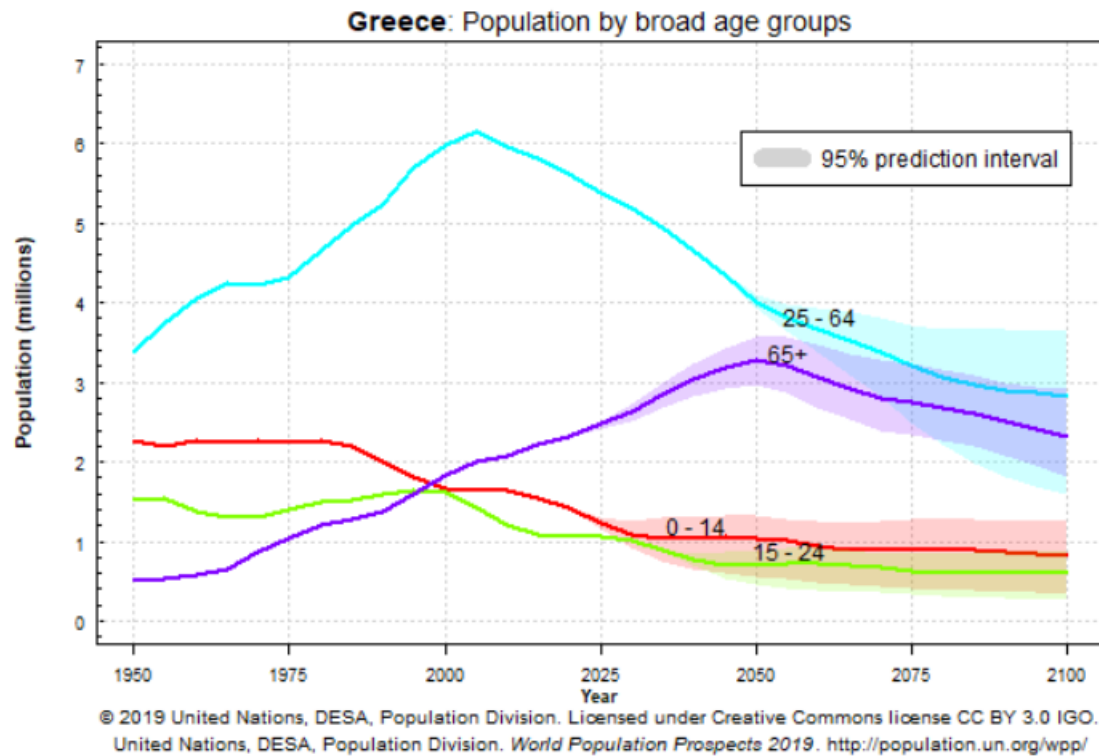


Figure 8: Greece: Population by broad age groups.

NEETs population in Greece

The OECD for the year 2019 draws up NEETs as the percentage of the total number of young people in the corresponding age group, as follows:

- Age 15-19 (women): 6.1%
- Age 15-19 (men): 7.2%
- Age 20-24 (women): 22.2%
- Age 20-24 (men): 21.9%

¹ <https://worldpopulationreview.com/countries/greece-population>

The percentage of NEETs aged 20-24 in Greece is particularly high compared to the OECD average (14.9%). The highest percentages of NEETs in Greece are underlined, especially at the ages of 20-24 (22%) and at the ages of 15-19 (7%).

5. *Characteristics of the labour market*

Prior to the shock of the COVID-19 pandemic, Greece's labour market was recovering after years of high unemployment and economic crisis. Over recent years, jobs growth reduced high unemployment rates, incomes were rising and workers were working longer in life. Reforms succeeded in raising enrolment in new, well targeted social protection programmes and made inroads into poverty. Labour activation policies were reengineered and take-up is strong of those that are effective. The government has started reducing the considerable tax and social contribution wedge on labour income, and plans further reductions.

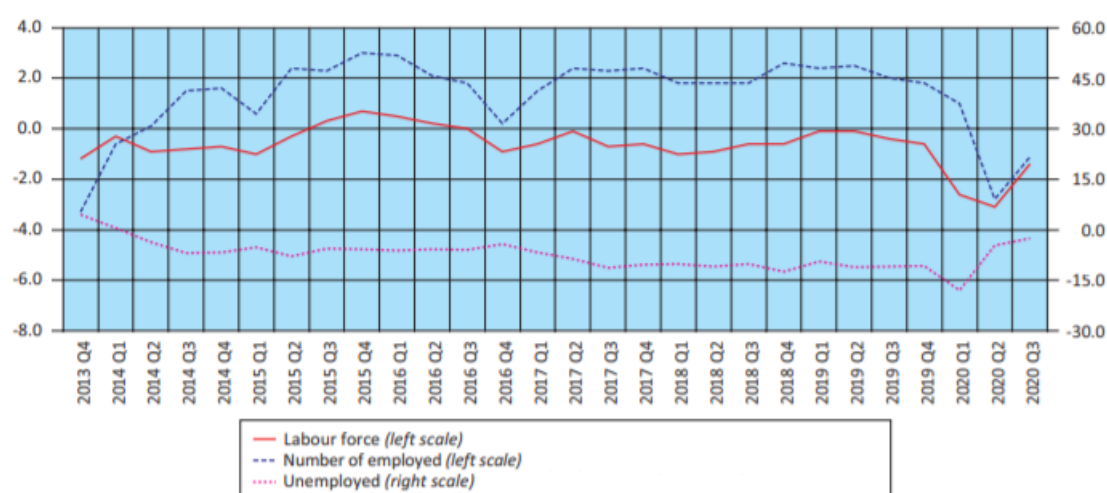


Figure 9: Labour force, employed, unemployed (year-on-year change %) (ELSTAT, 2021)

The COVID-19 shock has led to a temporary but extraordinary drop in production and large loss of tourism demand and employment. New hiring has frozen and large numbers are dropping out of the labour force. The government has responded with

substantial packages to strengthen the health system, buttress incomes and liquidity, provide temporary flexibility to employment arrangements and a short-time work scheme, and support the sectors most affected by the shock, such as tourism. As described in the 2020 Economic Survey of Greece (OECD, 2020), demand is likely to remain weak for some time, delaying the recovery in employment and adding to the challenge of high unemployment.

While Greece's labour market was improving, large and long-standing gaps remain relative to other OECD countries in terms of the number and inclusiveness of jobs, the quality of jobs, and prospects for skill development. Employment rates, though increasing, remain low, particularly among young adults, women and older workers. Youth and women have particularly poor employment outcomes, as a large share are outside the labour market, education or training, leading to low incomes and poverty. Many youths, including the most skilled, emigrate. Meanwhile the working-age population is falling due to net outwards migration and to an ageing population as fertility has been low for a long time and continues to decline.

For those out of work, systems to match jobseekers with opportunities or training are underdeveloped. Many jobseekers do not have the skills employers need, even though they generally have a good level of education. Care and other responsibilities combine with scarce voluntary part-time or flexible working arrangements to impede many women of all ages from seeking jobs or developing their skills. Those out of work are at the highest risk of poverty, although improved social protection is lowering this risk, while poverty among those in work doubled during the crisis to the highest rate among OECD EU countries.

Industries	2015		2016		2017		2018		2019		2020	
	Total	Employees	Total	Employees	Total	Employees	Total	Employees	Total	Employees	Total	Employees
Agriculture, forestry and fishing	511,749	147,912	499,829	146,466	503,293	141,795	506,641	146,065	497,063	150,536	451,294	143,005
Mining and quarrying; manufacturing; electricity, gas, steam and air conditioning supply; water supply; sewerage, waste management and remediation activities	391,367	317,940	408,586	335,483	402,256	332,325	404,839	336,089	416,730	345,984	408,521	337,222
Construction	195,160	110,183	197,090	112,526	190,508	109,693	193,462	110,547	192,420	113,095	185,895	105,095
Wholesale and retail trade; repair of motor vehicles and motorcycles; transportation and storage; accommodation and food service	1435,863	959,125	1554,733	1084,510	1560,431	1099,649	1578,622	1111,827	1609,275	1146,005	1579,899	1116,268
Information and communication	89,210	71,640	89,853	73,613	89,367	74,559	92,362	78,558	95,653	81,332	93,494	79,948
Financial and insurance activities	88,618	73,493	85,396	70,489	81,210	67,069	81,519	66,297	78,738	65,094	79,014	64,997
Real estate activities	15,156	10,282	17,848	12,310	17,912	12,457	17,761	13,363	18,945	14,297	18,243	14,040
Professional, scientific and technical activities; administrative and support service activities	396,639	230,519	403,476	245,229	388,815	242,545	395,712	248,214	402,066	251,462	401,373	253,680
Public administration and defence; compulsory social security; education; human health and social work activities	975,924	898,489	991,060	913,742	992,365	911,695	1014,296	931,013	1028,249	943,136	1062,083	968,563
Arts, entertainment and recreation, repair of household goods and other services	222,887	159,406	221,643	159,654	220,470	157,323	223,892	159,627	226,230	160,515	224,696	157,225
TOTAL	4322,573	2978,989	4469,514	3154,022	4446,627	3149,110	4509,106	3201,601	4565,369	3271,455	4504,512	3240,042

Table 2 Employment by industry during the last five (5) years in Greece (in thousands persons) (ELSTAT, 2020)

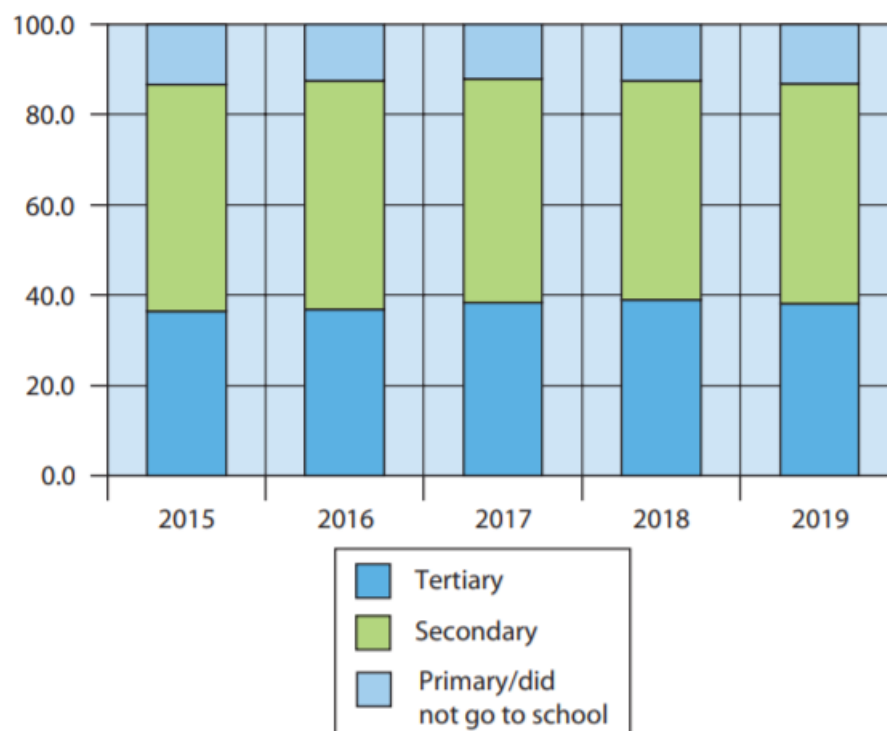


Figure 10: Percentage distribution of unemployed persons by educational attainment level (ELSTAT, 2020).

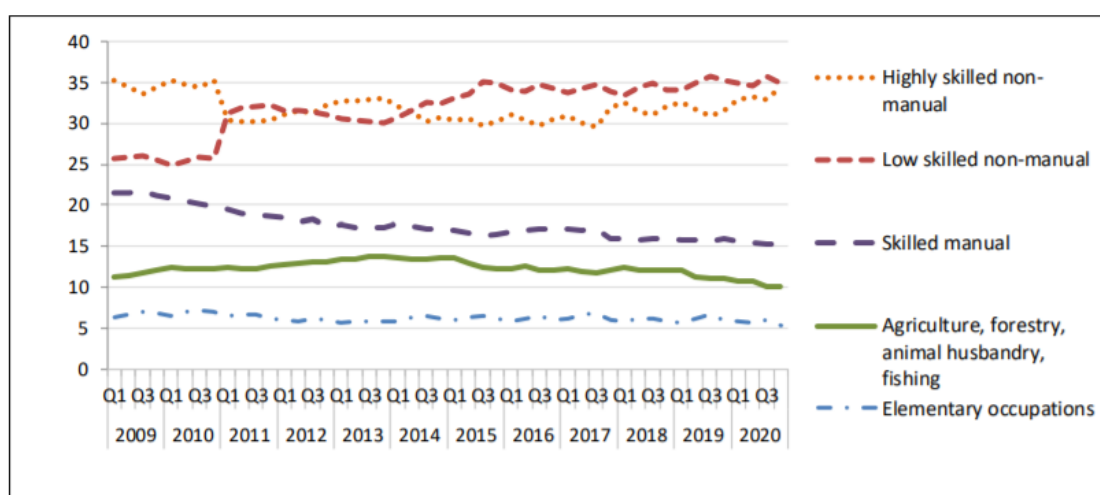


Figure 11: Percentage of employed by broad categories of occupations (ELSTAT, 2020).

Young people characteristics of the labour market

According to the OECD, for the year 2019, the employment rate of young people aged 15-24 in Greece was 14.2%. During the past decade in Greece, the number of the employed young people aged 15 to 24 years old is displayed in the following table (**Table 3**):

Year	Number of employed young people (15-24 years)
2010	237,5
2011	185,4
2012	147,1
2013	131,4
2014	145,6
2015	140,1
2016	137,8
2017	148,2
2018	145,8
2019	151,4

Table 3: Number of employed young people (15-24 years) in Greece (unit of measure: thousand) (Eurostat).

On the other hand, the number of the unemployed young people in Greece, for the years 2015 – 2019, is describing below (**Figure 1**):

Thousands							
Educa- tional attain- ment level	Years	Total		up to 19 years		20 - 24 years	
		Male	Female	Male	Female	Male	Female
Tertiary	2015	174.6	262.4	0.2	0.2	13.1	30.7
	2016	151.2	265.9	0.4	0.2	13.2	26.4
	2017	145.6	248.4	0.1	0.4	12.6	27.0
	2018	125.6	231.4	0.0	0.4	10.6	22.3
	2019	109.9	201.9	0.0	0.0	9.1	20.6
Secon- dary	2015	311.4	288.1	5.4	8.5	41.2	28.3
	2016	296.4	274.7	7.9	6.8	36.7	26.2
	2017	258.6	248.8	6.7	7.9	30.6	22.2
	2018	218.5	224.3	6.3	5.2	27.4	18.5
	2019	200.7	198.6	5.0	3.2	22.9	13.4
Primary/ did not go to school	2015	92.9	67.7	1.6	0.7	5.3	3.8
	2016	79.8	62.9	0.5	0.8	3.2	1.5
	2017	68.5	57.0	0.7	1.8	3.0	1.6
	2018	62.5	52.8	0.6	1.4	2.6	1.6
	2019	57.9	50.0	0.7	1.0	3.8	2.1

Figure 12: Unemployed young people by gender and educational level (ELSTAT).

5. SPORTS SECTOR LABOUR MARKET

In recent years, sport has acquired a significant profile in a number of Greek strategies and programmes. The contribution of the sport industry to the country's economy is very important. According to the Institute of Economics and Industrial Researches, despite the lack of a policy for the development of the sports industry and the backwardness compared to other EU countries, the industry produces 1.7% of GDP and employs 1.1% of the total employees. Furthermore, the indirect contribution of sports in sectors such as clothing and footwear, tourism, etc. is also great.

1. *Political system*

The sources of funding of the General Secretariat of Sports are:

- The Regular Budget
- The Public Investment Program
- OPAP (until 2000)
- ODIE (until 1999)

The General Secretariat of Sports, like any public body in Greece, is subsidized annually by the State Budget through the General Accounting Office of the State. The subsidized amount is divided into amounts, depending on the budget of its individual needs.

Distribution of money by the General Secretariat of Sports:

- Municipal Gyms
- National Gyms
- Federations
- Associations
- Public Authorities
- Education
- Scholarships
- National Stadiums
- Football teams
- Grass-root sport
- Theaters, Committees, sports projects

2. *Economic system*

Sport in Greece attracts the interest of a significant portion of the population, especially football and basketball. This interest is multifaceted with a common denominator always being the economic importance of sport which, especially after World War II, has grown rapidly. The emphasis given to sports by the media, especially the television, proves in the most incredible way the great importance that people attach to sports nowadays. Today, the sports industry constitutes an important business activity and is the subject of study in sciences such as management,

marketing and economics. The administration, management and marketing of sports are new sports sciences, which came from the need created by the great demands of the modern and complex operation of sports at all its levels. These sciences require a wide range of competencies, such as creating long-term and medium-term plans, budgeting, finding financial resources, managing human resources, etc.

The total number of people working in the sports industry in Greece in 2018 was 21.313. This represents a very high growth rate of 71.42% since 2011 and brings Greece closer to the European average of the Sport and Physical Activity workforce as a proportion of the workforce as a whole. During 2019, 0.5% of the total employment in Greece refers to the sports sector. Finally, in the second quarter of 2020 there were almost 200 sports workers per 100.000 inhabitants aged 15 and above when the European average was 215 sports workers (Eurostat).

The following diagrams gives a picture of Greece's labour market in the sports industry.

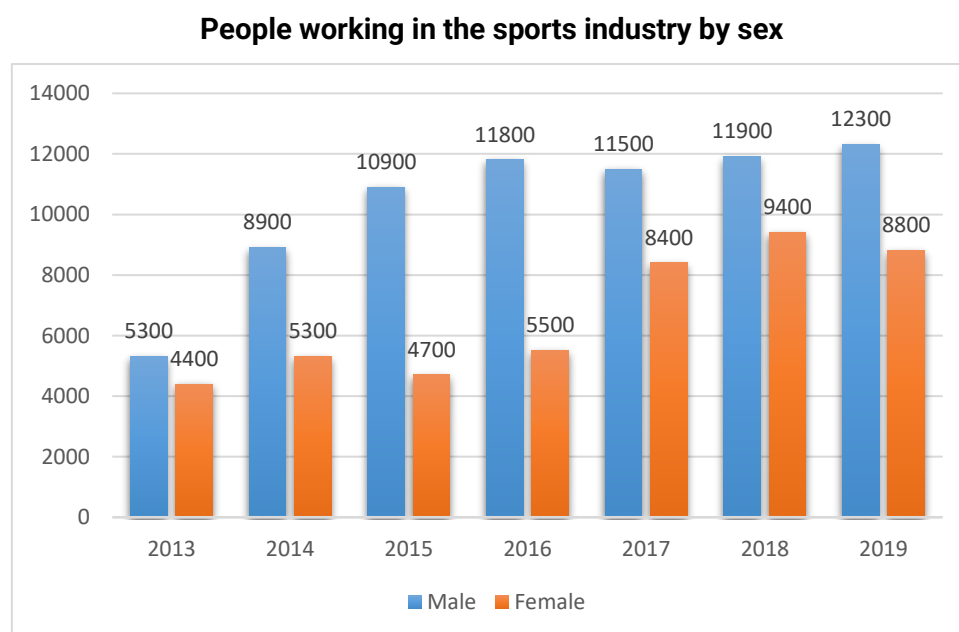


Figure 13. Employment in the sports industry by sex (Eurostat).

People working in the sports industry by age

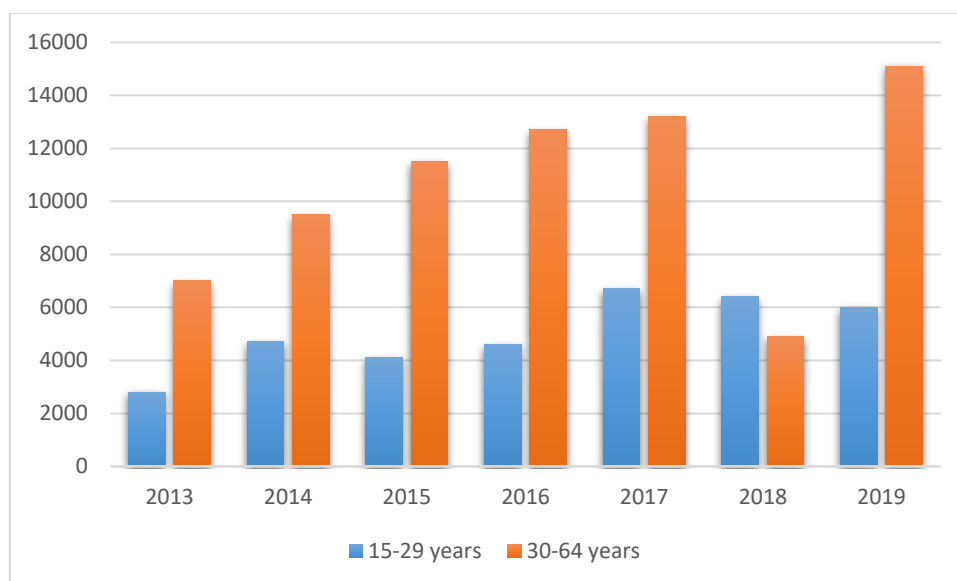


Figure 14: Employment in the sports industry by age (Eurostat).

People working in the sports industry by level of education

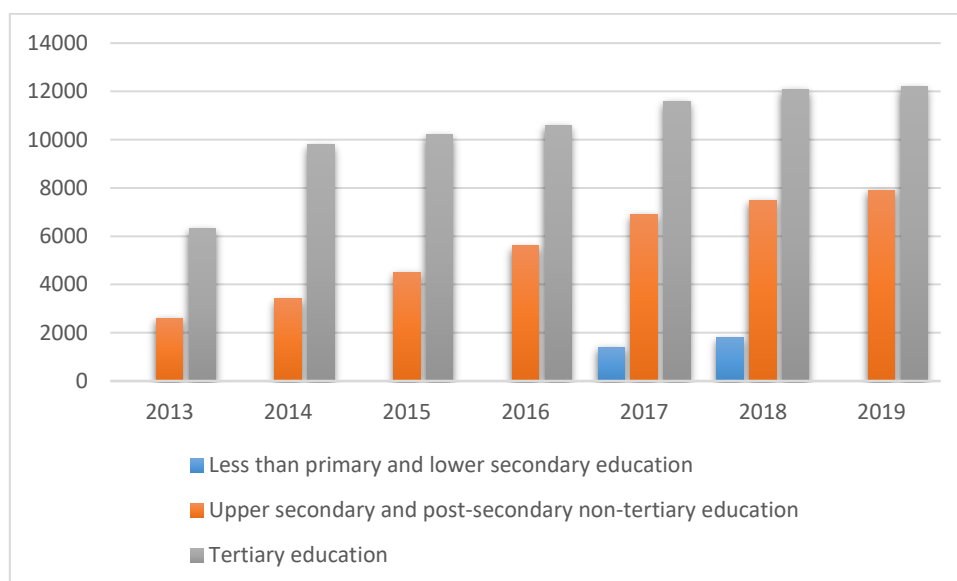


Figure 15: Employment in the sports industry by educational level (Eurostat).

6. *THE SPORT SECTOR IN GREECE*

As it is mentioned before, one of the most important industries within the service sector in Greece, is tourism. The sports industry is a very small sector within the Greek economy, contributing about 1.7 % to the country's GDP.

Although the sports industry is very small, Greece has a long and important history in the world of sport, being the home of the ancient Olympic Games, first recorded in 776 B.C. in Olympia. During the parade of nations Greece is always called first, as the founding nation of the ancient precursor of modern Olympics. Its national governing body is the Hellenic Olympic Committee.

Football is the most popular sport in Greece with lots of awards in worldwide level (the Greek national team won the UEFA Euro 2004 world tournament back in 2004) and is considered as the national sport. Greece is also considered as one of the world powerhouses for basketball. They are one of the founding members of FIBA and is considered as the fourth best team in the world (the Greek national basketball team has won the silver medal in the FIBA World Championship since 2006).

Hellenic Ministry of Culture and Sports

In the sport sector, the Hellenic Ministry of Culture and Sports holds the responsible public body for the administration and finance of sports, the General Secretariat of Sport (GGA). The main aim of the GGA is the determination of strategic plan and the configuration of the implementation method of the country's sports policy, within the framework of the State's constitutional obligation to protect, administrate and financially support the sport activities. Also, is mandated to ensure and enhance the social health and wellbeing through the cultivation and dissemination of sportsmanship and the Olympic values; the development, coordination, promotion and evaluation of the effectiveness of sport related programs and actions; the supervision and subsidy of sports bodies or stakeholders.

In particular it is responsible for:



- Systemically cultivating and spreading the sport spirit in the social consciousness
- Safeguarding and spreading the Olympic values at national and international level by any means
- Drafting and implementing the operational and regular action plans and projects that are related to the national sport policy
- The organisation, administration and evaluation of sports services through a systematic monitoring for the implementation of their goals in order to ensure effectiveness, efficiency and quality
- Ensuring the health of professional and amateur athletes
- The supervision and control of a number of sport organisations and sport facilities in accordance with the applicable provisions and based on the strategic planning of sport policy
- Supporting institutionally, scientifically, materially and financially all public and private bodies that are pertinent to the overall national sports policy

Hellenic Olympic Committee

The Hellenic Olympic Committee (HOC) is the governing Olympic body of Greece. It is the second oldest National Olympic Committee in the world (after the French Olympic Committee), it organizes the country's representatives at the Olympic Games and other multi-sport events.

The mission of the Hellenic Olympic Committee is to oversee and act to ensure the development, promotion and safeguarding of the Olympic Movement, the spirit of fair play and out-of-school physical activity, in accordance with the principles of the Olympic Ideal and the traditions of the Hellenic sport. The HOC's role is:

- ✓ To supervise the Olympic Sports and cooperate with the State as well as with the public and private bodies for the promotion of healthy sport policies.
- ✓ To encourage love for sports and respect for the spirit of sportsmanship among the young.
- ✓ To organise in cooperation with the National Federations the Olympic preparation of athletes.

- ✓ To proceed, on its sole responsibility, to the final selection of athletes who will represent Greece at the Olympic and Mediterranean Games.

Also, the HOC is responsible for the administration, the management and the maintenance of its premises such as:

- The Panathenaic Stadium
- The Olympic swimming center of Athens
- The neoclassical building Kapsali str. (headquarters of the HOC until 1999)
- The premises at Ancient Olympia where the International Olympic Academy is located.
- The Museum of the Modern Olympic games in Olympia
- The Athens Olympic Complex (OAKA) that was constructed within an area belonging to the HOC; therefore, representatives of the HOC participate in the Executive Board of OAKA.

Sport Federations

The sports federations are the highest form of organization of the sports clubs practicing the same sports or being active in the same sector of sports activity. It serves the purpose of the development of a sport or of a sports sector. It operates in accordance with the sports law and with the Civil Code's provisions on unions in general.

The nature of a sports federation, as a private law entity, is determined by the fact that:

- a) It results from an association of private entities and persons and has private powers,
- b) It manages the financial issues of private entities, namely the clubs which have joined it, and
- c) It serves the private interest that its members share, which is sports oriented, namely the development of the free physical culture of people and entities which have joined it.

Sports clubs

The sport clubs are the primary organisational unit of a sport and is the initial cell of sport competitive structure/form in Greece. A sports club is a union of natural persons in accordance with the provisions of law, whose main purpose is to systematically cultivate and develop the potential of its athletes for their participation in sports competitions. Sports clubs of the same sport are under the supervision of the federation of this sport.

7. EDUCATION AND TRAINING SYSTEM IN GREECE

The educational system in Greece is mainly characterized by its versatile character, which is ordained by the numerous laws and decrees of the responsible public body, the Ministry of Education, Research and Religious Affairs. The body is responsible for the design of the education policy, the supervision and monitoring of its implementation, as well as administration of the entire education system across all fields, agencies and levels. Over the years, the Ministry in question has made significant changes to the education system, most of which were mandated by the wish of each government to adopt recent scientific findings and acclaimed education models of other countries in the world. Adapting state-of-the-art research in the field of education, as well as foreign education practices to meet the needs of the Greek society and labour market has resulted in a multilayered education system, which caters for all students in the country. Most students in Greece attend public schools of all levels, for which there are no tuition fees, while less than 10% of the student population enrolls in private schools.

Education in Greece is compulsory for all children between the ages of 6 and 15. The education system is divided into Early Education and Care for children up to the age of 6, Primary Education for children between the ages of 6 and 12, Secondary Education for teenagers between the ages of 12 and 18, Higher Education for those wishing to attend university courses, and, finally, Lifelong Learning, which caters for adult students of all ages.

More specifically, the Greek education system consists of²:

1. **Early Education and Care:** In Greece there are Daycare Centers which provide children up to the age of 5 with pre-school education. The last stage of pre-school education is carried out in Kindergarten Schools, where young students take preparatory courses just before enrolling in primary/elementary schools.
2. **Primary Education:** Welcome children of the age of 6. Some of these schools are termed “Experimental”, as they carry out experimental education practices, and are supervised by university departments specializing in pedagogics and primary education. There are also primary schools which cater for students with physical or mental impairment, or special needs. In all three types of primary schools, students learn basic skills in a number of subjects, like Language Reading and Writing, Environmental Studies, Maths, English. Primary Schools in Greece operate between 8am and 1pm, while the majority of those offer extra classes on Physical Education, Art and Music until 4pm.
3. **Secondary Education:** All students graduating from primary education must attend courses in a Junior High School. There are several types of Junior High Schools. A student may attend the Junior High School which is located in his neighborhood, or he/she may be admitted to an Experimental Junior High School through a lottery system. Students who have a special interest in painting, drama, dancing or music may attend a Junior High School that specializes in the field. There are also Junior High Schools which address students from a multicultural background, as well as students with special needs. Most Junior High Schools operate from 8am to 2pm, but there are also evening schools that operate from 7pm till 10pm for students – mainly adults – who work during daytime. A variety of subjects are taught in Junior

² Despina-Alexandra Constantinides, 2014-2015. Fulbright participant in the Study of the United States Institutes program, Teachers Institute for Secondary School Educators at University of Illinois, Urbana-Champaign, IL

High Schools, including Modern and Ancient Greek Language, Maths, Physics, Chemistry, Geography, History, Physical Education, Religious Studies, Music and Art, while special emphasis is given to foreign language learning, as students are taught both English and another European language of their choice (students tend to choose between French and German). Students take exams in all subjects at the end of each school year. Students may also pursue vocational training in Vocational High Schools, or, once they are 16, they may enroll in a Vocational Evening High School and graduate after 4 years of study. In addition, there are Vocational Training Schools; in these schools, as well as in all Vocational High Schools students attend general education courses combined with workplace courses.

4. **Higher Education (Tertiary Education):** Greece has a high number of university graduates. Most of them attend four-year studies in University departments and in Technological University departments, as well as in the various departments of the School of Pedagogical and Technological Education, while those attending Technical University departments – specializing in fields like architecture and engineering – graduate after five years of studies. Courses in Higher Education institutes in Greece take the form of either lectures or workshops, and most of the courses spread over one semester. Most university departments in Greece offer one-year or two-year postgraduate courses, as well as the opportunity to pursue a doctoral degree. Students may also enroll in the Hellenic Open University for graduate or postgraduate studies.
5. **Lifelong Learning:** Lifelong Learning in Greece takes place in Lifelong Learning centers which are usually supervised by Municipality services. These centers offer a variety of courses, aiming at both formal and informal education. On the other hand, Vocational Training Institutes and Vocational Training Schools often adapt their curriculum to suit the needs of their adult students and of the labor market. Lifelong learning actions at all levels (national, regional, local) are governed by the principle of monitoring and

evaluation by the General Secretariat for Vocational Education, Training and Lifelong Learning. The National Organisation for the Certification of Qualifications & Vocational Guidance (EOPPEP) plays a key role. It developed the national framework of qualifications. It also implements the accreditation system for the teaching qualification of trainers for adults of non-formal education.

Finally, in Greece there are **Second Chance Adult Education Schools** which cater for those students who have dropped out of school at some point in their life, but wish to continue with their studies at a later date.

NEETs education level in Greece

The educational level of NEETs in Greece is higher in comparison with other European countries. NEETs in Greece hold a university degree -or more-, fact that explains their migration in their quest to find better working conditions. In fact, in Greece, more than 30% of young people who have completed the higher educational level can be classified as NEET, while almost half of the NEET population has attended upper secondary and/or post-secondary education.

8. SPORTS IN EDUCATION AND TRAINING SYSTEM

Physical education is included in the lessons of the school program in primary and secondary level of education and is usually taught twice a week.

Ministry of Education, Research and Religions Affairs is responsible for the implementation of the policy for Physical Education in all levels of Education. Physical education is necessary in order for the students to enter into the deep meaning of sports, teamwork, the mental peace that one acquires when exercising and the noble rivalry. Although physical education is very important for both the health (mental and physical) and the character shaping of a student, since the founding of the Greek state, sports has been and is considered an extracurricular activity and is given secondary priority in Greek schools.

The teaching of the Physical Education in schools is covered with approximate 2-3 hours of teaching per week and mainly covered by the following topics/activities:

1. **Primary Education:** activities aimed at psychomotor education (e.g. dancing), individual and team sports (football, volleyball, basketball, swimming etc.), and gymnastics.
2. **Secondary Education:** individual and team sports such as basketball, volleyball, football, handball, gymnastics, dancing, fitness and different competitive levels of school events in various sports. Furthermore, there is an introduction process to non-popular sports, Paralympic games, etc.
3. **Higher/Tertiary Education:** There are four (4) universities in Greece for studying the Physical Education and Sport Science: the University of Athens (Central Greece), the University of Thessaloniki (Central Macedonia), the University of Thrace (Eastern Macedonia) and the University of Thessaly (in the city of Volos). These Departments are independent and do not belong to any Faculty. They offer sport related Bachelor, Master's and Doctorate programmes in regards to physical education and sport science.

Except for the participation of Greek students in the physical activity through school lessons, the students are also able to participate in PanHellenic/National School Games (atomic and team sports). Finally, they are also allowed to participate at international meetings in regards to sports, such as the European and World School Games.

9. *LEGAL FRAMEWORK*

In the 20th century the development of sports has escaped private initiative. Nowadays, nation states are particularly interested in the sports industry, so the international legal order. Thus, the sports industry is the subject of constitutional provisions as well as national laws.

The current Constitution of Greece though has limited references in regards to sports or Physical Education as part of the educational system. However, in relation to other European Constitutions it should be considered as a very advanced one, especially due to the fact that it includes Physical Education in the purposes of Education.

The Greek Constitution shows a limited interest for the human body and a predominantly physical activity such as physical, is not considered in the focus of its interest. However, even from an economical perspective, physical activity did not particularly concern the Constitution either. Nevertheless, the current Constitution of Greece, sets the state action framework for sports and Physical Education mostly as the aim of Education, which consists of one of the basic missions of the state.

According to the Greek Constitution's Article 16 (§ 9), "Sport is under the protection and supervision of the state. The state subsidizes and controls the associations of sports clubs of all kinds as defined by the law. The law also sponsors the aid distribution provided each time to the sponsored associations, according to their bourn. According to the aforementioned regulations of the Constitution, sports fall within the aims of the state, which maintains a strong interest in its development the last few years mainly.

It should be noted that, except for Spain's and Portugal's Constitutions, these regulations are particularly advanced in relation to other European constitutions. In fact, if we take into consideration the tradition of sports in Greece as well as the ancient Greek approach, we can understand why sports is considered as a symbol of Hellenism for the Greek Law. Olympism and sports have indeed a special weight in relation to the national identity of the Modern Greeks, something that is not happening in other European countries.

The regulations of the Constitution in article 16 (§ 9) are describing the right of citizens for free development of sports activity and instruct the legislator to make such arrangements in order to build organized sports and competitive activity. These regulations form a constitutional right to individual and collective free sport action under state's supervision and protection. In this sense, sports as an extracurricular activity, but also Physical Education as a school lesson, are formally established as institutions in the current Constitution of Greece. Consequently, Physical Education is

one of the purposes of Education through which the moral and spiritual cultivation of citizens are developed.

The basic law that governs the sports sector in Greece is the 2722/99 (replacing Law 75/1975). This law contributed to the reform of the current legal framework concerning Sports and laid the foundations for the better organization and progress of Amateur and Professional Sports (Operation of Clubs – Associations - Federations, Sports Companies, Refereeing, Athletes Motivations, Sports for All, for the disabled, etc.), responding to the modern needs of Sports and society and contributing significantly to the successful organization and conduction of the Olympic Games in Greece back in 2004.

In Greece, the General Secretariat of Sports (GSC) is responsible for the strategic planning and implementation of the country's sports policy, in the context of the state's constitutional obligation to protect, supervise and financially support sports. The Superior Officer of the GSC is the Deputy Minister of Culture in charge of Sports (or Deputy Minister of Sports), who in his turn delegates important responsibilities to the Secretary General of Sports. The responsibilities are defined vertically based on authorizing decisions and concern the General Secretaries, the General Managers and the Heads of Directorates & Departments.

The responsibility for the national staff planning, definition and achievement of the goals, as well as the overall responsibility for the progress and good organization of the sports sector in the country, lies under the General Directorate of Sports Organization, which is also the highest operating Directorate.

The General Directorate of Sports Organization is composed of the following Directorates³:

a) Competitive Sports Directorate. The responsibilities concern the Recreational Sports cultivated through the recognized Federations and with the recognized sports clubs that belong to them.

³ <https://www.hocsh.org/el/content/o-organismos>

b) Directorate of Professional Sports and Sports Professions whose responsibilities are the control and supervision of all activities of professional sports and sports professions, as well as issues of sports violence, drug doping, imposition of fines for material damages incurred during professional competitions, the taking of measures to deal with possible violence in competitions etc.

c) Directorate of Sports for All, Promotion, Development of Sports, Scientific Support and International Relations, with responsibilities that cover the Development of Sports, the implementation of Sport for All program at national level, Sports Tourism, Aegis, Scientific Documentation of Sports and the promotion of Sports and Olympism at International level.

d) Directorate of Technical Works and Infrastructure (National Stadiums, sports venues where mass sports programs are held).

e) Support of Sports Directorate (Human Resources Management, Web and Electronic Infrastructure, Secretariat, Service and Information of Citizens in physical or electronic way, etc.).

Finally, local government, with the support and partial implementation of the state sports strategy, is an important factor in the development of citizens' sports behavior, contributing to the well-being and well-being of citizens (Mamade, Pires & Colaco, 1998). The programs are adjusted according to the citizens' needs but also according to the respective budgetary practices.

10. MAIN NATIONAL STAKEHOLDERS FOR THE SKILLS DEVELOPMENT IN THE SPORTS SECTOR

The main national key stakeholders that have been mapped in the previous Activity of Skills4Sports (A3.1.1), are given in the table below, classified by the level of their interest and influence:

HIGH INFLUENCE - LOW INTEREST	HIGH INFLUENCE - HIGH INTEREST

<p>International Olympic Academy, Rebrain Western Greece, Hellenic Gymnastics Federation, Hellenic Weightlifting Federation, Hellenic Basketball Federation, Hellenic Fencing Federation, Hellenic Wrestling Federation, Hellenic Volleyball Federation, Hellenic Cycling Federation, Hellenic Arching Federation, Hellenic Football Federation, Hellenic Football Fans Federation, Hellenic Swimming Federation, Association of Greek Gymnastics Sports Clubs</p>	<p>EOPPEP, INEDIBIM, General Secretariat for Lifelong Learning, General Secretariat of Sports, Ministry of Culture and Sports, Hellenic National Youth Council, Hellenic Olympic Academy, Hellenic Olympic Committee, Hellenic Paralympic Committee, Institute of Educational Policy, Regeneration, NCR- Youth Centre, Youth Center of Epirus, Youth Sports Training Center, KEAN Youth Center, Youth Center of Kalamata, OAED, EKPA University</p>
LOW INFLUENCE - LOW INTEREST	LOW INFLUENCE - HIGH INTEREST
<p>Solidarity Now, Sports-Culture-Environment Public Benefit Enterprise, The American College of Greece, IDEF College, City Unity College, DEI College, AEGEAN College, Mediterranean College</p>	<p>AOPSI Education Services, KMOP, IASIS, EMFASIS Foundation, ARSIS – Association for the Social Support of Youth, National Institute of Labor and Human Resources, HELLENIC MODERN PENTATHLON FEDERATION, Hellenic Open University, GAZZETTA</p>

11. MAPPING OF CURRENT ACTIVITIES AND INITIATIVES

Some of the main programmes and initiatives that Greece implements and participates in regional as well as in international level are:

Sport for All Programme

The design of Sport for All Programmes based on the philosophy that lifelong sport helps to improve both physical and mental health, therefore helps to improve public

health and aids the economy of a state - so state strategies to develop the interest of exercise in citizens should be promoted⁴.

The main aim of the program is to convince modern man that in the age of computers and digitization, where the production of work does not require high physical effort, but it is offered in front of a computer screen or from a specific place, the daily exercise acts as a counterweight by balancing physical inactivity. At the same time it aims to persuade young people not to waste their free time in vain and degenerate habits such as the endless internet use, the passive imitation of dangerous habits (smoking, alcohol, addictive substances, etc.) but to get "life in their hands" through exercise (Koustelios, Zournatzi, Rouseti & Gkanatsios, 2013).

Sport for All program is addressed to:

- ✓ Local Authorities and their legal entities which include sports to their legal composition (e.g., Organization of Culture and Sports of a Municipality or Organization of Education and Sports of a Municipality).
- ✓ In other Private or Public entities such as educational or cultural associations, or non-profit educational or medical institutions whose sporting purpose must also be demonstrated

About 4500 different types of Sport for All programs were implemented every year in all regions and Local Authorities of Greece. Some of the Programs that Sport for All includes are:

- Exercise in Preschool for children aged 4-6 years old
- Child and Sports for children aged 6-12 years old
- Exercise at adolescence for children aged 13-18 years old
- Adult exercise for people aged over 19 years old
- Sports and young people for people aged 19-30
- Exercise at old age for people aged over 65 years old
- Exercise at Universities for students, teachers and other employees in the universities

⁴ <http://www.opengov.gr/cultureath/?p=5225>

- Exercise at workplaces for exercise of the employees in specially designed spaces within their workplace or in other places
- Exercise for people with disabilities
- Exercise in detention centers
- Exercise in Mental Health centers
- Exercise for socially vulnerable groups (refugees, Roma community, etc.)
- Exercise for people with chronic diseases

Erasmus+ Sport Programme

Erasmus+ is the EU's initiative programme to support education, training, youth and sport in Europe. The Sport Chapter in the Erasmus+ Programme aims to support European partnerships on grassroots sport in order to pursue the following objectives:

1. Tackle cross-border threats to the integrity of sport, such as doping, match fixing and violence, as well as all kinds of intolerance and discrimination;
2. To promote and support good governance in sport and dual careers of athletes;
3. To promote voluntary activities in sport, together with social inclusion, equal opportunities and awareness of the importance of health-enhancing physical activity, through increased participation in, and equal access to sport for all.

Focus is to be given to grassroots sport. The Actions in the field of sport are expected to contribute to the implementation of the European Week of Sport, initiative launched by the European Commission to promote sport and physical activity in the European Union, in the light of declining participation levels.

European Week of Sport

Launched in 2015, the European Week of Sport was created in response to the worsening inactivity crisis. Despite sport and physical activity substantially contributing to the well-being of European citizens, the level of physical activity is currently stagnating and even declining in some countries. For six years, the European Week of Sports has helped tackle the inactivity crisis by encouraging Europeans to



embrace a healthy and active lifestyle. The Week is for everyone, regardless of age, social background or fitness level.

"Live Athletic (Zise Athlitika)" Programme

It is an innovative three-year program, created shortly before the pandemic (Covid-19) broke out, with the mission of promoting the Athletic Ideal and Athletic Ethics as an everyday life model. Olympians, champions and popular athletes participate and aim to raise the awareness of all and especially the younger generations (children and adolescents) in the values of sports.

Due to the pandemic crisis, the project evolved through online campaigns through a series of #ziseathlitika video messages on social media platforms/pages (Facebook, Twitter, Instagram, YouTube) for:

- "We stay home", passing the message of social distancing for the limitation of the spread of the virus,
- "Exercising at Home", with a series of videos with ideas and exercises at home,
- "Balanced Diet", with suggestions for healthy eating,
- "We give Blood", with voluntary blood donation actions, where popular athletes donate blood and invite citizens to participate. Actions have already been taken in large sports centers with a large participation of volunteer blood donors, and
- "Auctions" of sports souvenirs to strengthen the Public Health System, where Olympians, champions and famous athletes offer personal sports items.

"Start to talk" Initiative

"Start to talk" is a Council of Europe call for action to public authorities and the sport movement to stop child sexual abuse. By joining this call, governments, sport clubs, associations and federations, as well as athletes and coaches, pledge to take concrete measures to prevent and respond to abuse.

To stop child abuse in sport, the Council of Europe, through its children's rights programme and its Enlarged Partial Agreement on Sport (EPAS), offers a platform for co-operation between public authorities, the sport movement, experts, child-protection agencies, the European Union and other international organisations. It also helps to:



- Raise awareness to empower parents and children as well as the public at large through targeted resources (TV spots, videos, communication material etc.)
- Improve legislation and policies
- Set up strategies and codes of conduct in sport to safeguard children
- Train sport professionals (coaches, managers and policy makers)
- Disseminate knowledge and expertise by providing access to recent information and findings and to a network of experts

European network for the promotion of health-enhancing physical activity (HEPA)

The mission of HEPA Europe is to provide a forum for the advancement of health-enhancing physical activity (HEPA) research, policy and practice for better health and well-being across the WHO European Region. HEPA Europe is a WHO/Europe network, whose activities are based on WHO policy statements and corresponding documents from the European Commission, and are aligned with the United Nations' Sustainable Development Goals and WHO Global Action Plan on Physical Activity 2018–2030.

HEPA Europe membership is open to organizations and institutions active at the regional, national or subnational level, who are willing to contribute to the goals and objectives of the network. The new WHO Country Office in Greece was established in 2018 and is located in Athens, providing a platform for daily collaboration with the Greek Ministry of Health and other stakeholders on national health priorities. The Country Office assists the Greek Government in shaping the national health agenda, providing technical support and monitoring and assessing health trends. It supports the host country in its work towards universal health coverage and a sustainable and effective health system, taking a holistic health-system approach.

The objectives of the program are:

- ⇒ The promotion of interdisciplinary communication and knowledge exchange between researchers, professionals and policy makers
- ⇒ The facilitation of the exchange of experiences and best practices
- ⇒ The contribution and development of multisectoral policies and strategies
- ⇒ The enhancement of the research



⇒ The provision of opportunities for the development of researchers' skills, etc.

As mentioned before, Greece is showing more and more interest in sports, a fact that has led governments to try to develop the sports industry by including more and more programmes and initiatives year by year.

12. *BARRIERS AND DRIVERS*

This section of the report describes the barriers, as well as the drivers which the participants of the online survey (stakeholders and NEETs) provided from their experience and perspective. The most important barriers and drivers for the skills development and the sports sector in Greece, are given below:

Barriers for the skills development in the sport sector

- Lack of national planning
- Lack of teaching staff
- Lack of legislation
- Lack of training programmes
- Lack of information to young people
- Lack of resources lead to the reduction of professions and job opportunities

Barriers for the development of the sports sector

- Lack of financial resources
- Lack of sport facilities
- COVID-19 emergency – sports need physical presence
- Unsatisfactory financial rehabilitation of most of the professions (no financial incentives)
- Lack of policy that makes the employment of young people difficult
- The financial crisis of Greece

Drivers for the development of the sports sector

- There are some programmes dedicated to sports by the Greek state (Sport for all, programmes for the anti-doping, etc.)
- There are few financial resources from the state dedicated only to the sports sector
- Financial support for the sports infrastructure
- Creation of new sport professions due to quarantine (esports, trend towards good health led to the rise of sport activity, etc.)

Drivers for the skills development in the sport sector

- Upgrade of the educational system by increasing the sport educators
- Financial support to schools for the Physical education
- The creation of a point system in the exams from Pan-Hellenic sports games
- The creation of trainings in the schools

13. SUPPORTING MECHANISMS RELATED TO SKILLS DEVELOPMENT FOR THE SPORTS SECTOR

National and regional level

National Center for Sports Research

The National Center for Sports Research, which operates at the Olympic Stadium of Athens as a scientific body of the General Secretariat of Sports, has the knowledge and experience to scientifically and substantially support the effort of athletes to improve their performance by evaluating:

1. The health of athletes (cardiological, somatometric, musculoskeletal control)
2. Physical capacity (strength, speed, flexibility, elasticity, etc.)
3. Organic capacity (aerobic, anaerobic capacity)
4. The hematological, biochemical and hormonal profile
5. Psychodiagnostics tests

The Physical Education office

Collaborates with the Ministry of Education for the Physical Education and sports at schools along with the General Secretariat of Sports for the organization and execution of development sports programs while also dealing with general issues concerning sports (events, gyms, etc.).

The Sports Department (Τμήμα Αθλητικών Θεμάτων)

The sports department belongs to the General Secretariat of Sports and is responsible for the promotion and development of sports and the establishment of sports centers.

Local level

At the local and regional level, the most important supporting mechanisms are described below. Therefore, in each Prefecture of Greece there is:

1. The office of Physical Education which collaborates with the Ministry of Education for Physical Education and sports at schools, with the General Secretariat of Sports for the organization and execution of development sports programs, while also dealing with general sports issues (events, gyms).
2. The Local Committees or sports clubs associations of some sports federations which technically and organizationally support the centers of sports activities and they are the development cells of the sports in the country.
3. The Local Authorities also are responsible for organizing sports activities in the Municipalities and Communities. They cooperate with the General Secretariat of Sports for organizational issues, while some of their programs are funded by the General Secretariat of Sports.

14. CONCLUSIONS

The sports industry in Greece is challenging and at the same time it creates a lot of opportunities. In addition to its enormous cultural value, it is also a large and powerful

economic industry which can bring huge profits. Unfortunately, due to a lot of factors (economic crisis, weak legislation, etc.), the sector will need new supporting mechanisms to deal with rising threats and difficulties when it comes to financial and business continuity.

The main findings of the present report concerning the actions that should be implemented for the development of the sports sector in Greece, are concluded below:

- Creation of a policy for the facilitation of business and professional action in the sports sector
- Improvement of existing structures, services and information systems, consulting and monitoring of entrepreneurship in the sports sector
- Provision of comprehensive support for business creation and professional activities in the sports sector
- Development of educational tools and trainings to strengthen entrepreneurship in the sports sector
- Empowerment and support of the young people
- Vocational guidance to young people in order to get in touch with other professions in the sports sector

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16. ANNEXES

Annex 1. Questionnaires

Annex 2. SWOT Analysis

Annex 3. PESTLE Analysis

1. *Annex 1. Questionnaires*

Questionnaire for Key Stakeholders:

- <https://forms.gle/3YLUD576DVkXKzDT7>

Questionnaire for Final Beneficiaries:

- <https://forms.gle/LY9JeE1FPu9s1ndf6>

2. *Annex 2. SWOT Analysis*

INTERNAL	STRENGTHS	WEAKNESSES
	<ul style="list-style-type: none"> • There are some financial resources dedicated to the sports sector • Great history of sports in Greece • Dynamic sector in Greece • Existence of programmes and initiatives dedicated to the sports sector 	<ul style="list-style-type: none"> • Lack of financial resources • Lack of policy • Lack of supportive sports infrastructures and facilities • Lack of educational programmes and trainings • Weak legislation • High unemployment rates of the sector
EXTERNAL	OPPORTUNITIES	THREATS
	<ul style="list-style-type: none"> • Development of sport tourism due to the geographical location of Greece • High interest for the Physical Education in schools by the state • Employment opportunities in the field of information technology and e-sports • Development of new sports beyond the 	<ul style="list-style-type: none"> • Wrong distribution of financial resources to sports industry • Important professions in the sports sector are difficult to find (psychologist, nutritionist, etc.) • The available budget covers the basic needs and does not allow the development of new professions • Financial crisis • Violence in the sports

	well-known and popular ones	<ul style="list-style-type: none"> • Lack of meritocracy and transparency • Pandemic crisis
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3. Annex 3. PESTLE Analysis

	External factors to consider	Factors affected within sports industry	Importance (High - Medium - Low)
POLITICAL	Government policy Political stability Industry regulations Global agreements etc.	<ul style="list-style-type: none"> • Underfunding of the sports sector • The non-utilization of all available sports facilities Although there are a lot of sports facilities, not all of them are operating due to infrastructure maintenance needs • The sport sector does not invest in the youth • The lack of training and human resources development framework • Policy-making process and policies for the development of sports 	High
ECONOMIC	Globalisation, Interest rates, Employment or unemployment rates	<ul style="list-style-type: none"> • Available budget covers the basic needs of associations – no room for development • Not all sports facilities provide the necessary equipment needed for the professionals due to lack of finance • High taxation 	High
SOCIAL	Lifestyle factors		Medium

	<p>Career attitudes Work-life balance Population Demographics Education levels, Cultural trends, Attitude changes and changes in lifestyles</p>	<ul style="list-style-type: none"> • High unemployment rate in the sports sector • The violence in sports is a critical factor in Greece • Not equal opportunities for vulnerable groups • High interest of sports via education • Skills development trainings 	
TECHNOLOGY	<p>Automation Innovation Social networking Upgrades Artificial Intelligence Security Changes in digital or mobile technology</p>	<ul style="list-style-type: none"> • Many professions have been replaced by technology • Low security level 	Low
ENVIRONMENTAL	<p>CSR (Corporate social responsibility) Ethical sourcing Transportation Future pandemics Climate, Waste disposal and sustainability.</p>	<ul style="list-style-type: none"> • COVID-19 pandemic • Financial crisis 	High
LEGAL	<p>Employment legislation Common law Local labour law Health and safety regulations</p>	<ul style="list-style-type: none"> • There are not many laws protecting the sports sector in Greece • Weak legislation and policy 	High

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