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Skills4Sports

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

A3.2.2
Synthesis of the cross-border analysis report

WP3 – Research & Tools Development

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The 2014-2020 ENI CBC Mediterranean Sea Basin Programme

The 2014-2020 ENI CBC Mediterranean Sea Basin Programme is a multilateral Cross-Border Cooperation (CBC) initiative funded by the European Neighbourhood Instrument (ENI). The Programme objective is to foster fair, equitable and sustainable economic, social and territorial development, which may advance cross-border integration and valorise participating countries' territories and values. The following 13 countries participate in the Programme: Cyprus, Egypt, France, Greece, Israel, Italy, Jordan, Lebanon, Malta, Palestine, Portugal, Spain, and Tunisia. The Managing Authority (MA) is the Autonomous Region of Sardinia (Italy). Official Programme languages are Arabic, English and French. For more information, please visit: **www.enicbcmed.eu**

The European Union

The European Union is made up of 27 Member States who have decided to gradually link together their know-how, resources and destinies. Together, during a period of enlargement of 50 years, they have built a zone of stability, democracy and sustainable development whilst maintaining cultural diversity, tolerance and individual freedoms. The European Union is committed to sharing its achievements and its values with countries and peoples beyond its borders.

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1 Introduction

This Activity 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 include elements of the partners regional reports (A3.2.1), as well as a comparative illustration. Based on the findings, the supporting mechanisms and the initiatives for every region, a benchmarking matrix will be created to position each region to a comparative map, identifying the elements that could potentially been improved.

As a result, for conducting this report, a clear and detailed situation analysis is going to be reported for the Mediterranean region and the cross-border area in terms of Skills4Sports, based on the elements and findings of the Activity 3.2.1 – Regional Analysis and Report.

1.1 *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 Cross-border Analysis report will become the baseline on which the Skills Gaps Analysis will be based on. The present report focuses on the analysis of the situation in frames of Skills4Sports for the cross-border are of the project, providing also the main key facts and themes for the whole Mediterranean region.

2 Methodology

The A3.2.2 – Synthesis of the cross-border Analysis report will create a synthetic cross-border analysis of the Mediterranean region from the participating countries of Skills4Sports (Greece, Malta, Italy, Spain, Palestine and Lebanon). The synthesis will be based on the previous activity (A3.2.1) in which a detailed situation analysis has been first conducted for each region/country of the project. The conclusions and findings of the regional reports, from the desk research and the online survey as well, will be presented and summarized at a cross-border level for the Mediterranean region, in order for the project partners to analyse the existing situation that needs to be improved in the sports industry through Skills4Sports.

Except for the synthesis, this activity also includes a benchmarking matrix according to the good practices, supporting mechanisms and barriers described in each regional report and participating region/country of Skills4Sports. It is very important to position each region separately and all regions together to a comparative map in order to be able to identify the amenities and disadvantages of the skills development in the sports sector for the Mediterranean region.

In conclusion, the conduction of the Synthesis of the cross-border Analysis Report for the cross-border area of Skills4Sports has been based on the three (3) following methods:

- ✔ Desk research for the existing situation in the Mediterranean region
- ✔ Findings and conclusions of the partners Regional Analysis Reports (A3.2.1)
- ✔ Benchmarking analysis

3 Mediterranean region situation analysis

3.1 Geographical system

The Mediterranean is a sea located near Europe. There are a grand total of twenty-three countries that make up the region of the Mediterranean. The Mediterranean Sea is actually the dividing factor between the northern border of Africa and the southernmost countries of Europe. To the south of the Mediterranean, there are nine African countries along the coastline of the body of water.

The Mediterranean Sea itself stretches for a total length of approximately 2.500 miles. The region is referred to as the Mediterranean because it is a word that means the sea between the lands, which is exactly what the Mediterranean Sea is, quite literally. The northernmost point of the Mediterranean is the innermost inlet of Croatia, while the southernmost point of the region is the inland region of Libya that just barely touches the coast of the Gulf of Sidra.

***Figure 1**: Map of the MED area.*

3.1.1 Cross-border area of Skills4Sports

The cross-border area of Skills4Sports consists of the countries Greece, Italy, Spain, Malta, Palestine and Lebanon. All countries belong geographically to the Mediterranean basin:

Greece

Greece is located at the south-eastern tip of Europe, bordering Bulgaria, North Macedonia and Albania to the south and Turkey to the east. It is washed by the waters of the Mediterranean Sea and is surrounded on the east by the Aegean Sea and on the west by the Ionian Sea owning more than 2.500 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 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 (***Figure 2***).

Figure 2: *Greece (<u>https://geology.com/world/world-map.shtml</u>).*

Malta

Malta is located right in the middle of the Mediterranean Sea, lying about 93 km south of Sicily, 288 km north of Libya, and about 290 km east of Tunisia, located in the passageway between Africa and Europe. The Maltese Archipelago is comprised by five islands: Malta (the largest), Gozo, Comino, and the inhabited islets of Kemmunett (Comminotto) and Filfla[1]. The largest island of the Archipelago, Malta, remains the cultural, commercial and administrative center and one of the smallest countries in the world, with an area of just 316 sq km. Yet it is one of the densest with over 417.000 residents. The geographical classification of Malta and Gozo consist of 6 regions: Gozo

[1] https://www.britannica.com/place/Malta

& Comino, Northern, Northern Harbour, Southern Harbour, Western and South Eastern (***Figure 3***).

Figure 3*: Malta (*[*https://geology.com/world/world-map.shtml)*](https://geology.com/world/world-map.shtml)*).*

Italy

Italy is located in Southern Europe, bordering to the North, respectively from West to East: France, Switzerland, Austria and Slovenia. Its northern borders are delimited by the Alpine range, also enclosing on the Italian side the Po Valley and the Venetian plain. Its national territory covers moreover, from North to South, the overall surface of the Italian Peninsula, including also the two biggest islands of the Mediterranean Sea, Sicily and Sardinia, among its regions as well as a large number of smaller islands. Italy is constituted by 20 regions, five of these (Aosta Valley, Trentino Alto Adige/ Südtirol, Friuli Venezia Giulia, Sardinia and Sicily) having a special autonomous status that enables them to enact legislation on additional matters, 107 provinces or metropolitan cities and 7.960 municipalities (***Figure 4***).

Figure 4: *Italy (<https://geology.com/world/world-map.shtml>).*

Spain

Spain is a country in the Southwestern Europe with some pockets of territory across the Strait of Gibraltar and the Atlantic Ocean. Its continental European territory is situated on the Iberian Peninsula and its territory also includes two Archipelagos: The Canary Islands off the coast of North Africa and the Balearic Islands in the Mediterranean Sea. Catalonia is an autonomous community located in the north-east of Spain, between the Pyrenees and the shores of the Mediterranean Sea. It exercises its self-government in the Spanish State. It covers a total area of 31.108 square kms and comprises four provinces (Barcelona, Lleida, Tarragona and Girona) and 947 municipalities. The capital of Catalonia and largest city, Barcelona, is the second-most populated municipality in Spain and the fifth-most populous urban area in the European Union (***Figure 5***).

Figure 5: *Spain (https://geology.com/world/world-map.shtml).*

Palestine

Palestine is an area of the eastern Mediterranean region, recognized officially as the State of Palestine by the United Nations and other entities, is a state in Western Asia claiming the West Bank and Gaza Strip with Jerusalem as the designated capital. Palestine is under occupation since 1948, comprises of historical Palestine (Israel today), Gaza Strip (along the coast of the Mediterranean Sea) and the West Bank (West of the Jordan River). It is divided into two main geographical units: the West Bank and the Gaza Strip. It operates at three different levels of government: the central level, the regional level and the local level. In Palestine there are 16 governorates and 405 local government units (***Figure 6***).

Figure 6: *Palestine (West Bank – Gaza Strip)* *(https://geology.com/world/world-map.shtml).*

Lebanon

Lebanon is a country in Western Asia. Lebanon's location at the crossroads of the Mediterranean Basin and the Arabian hinterland has contributed to its rich history and shaped a cultural identity of religious diversity. It covers an area of just 10,452 km^2, with a population of some 6.8 million and is one of the smallest countries in Asia. It lies on the western coast of the middle east and is located at the crossroads of Europe, Asia and Africa. A location that makes Lebanon an integral hub for trading, logistics and culture for the long duration of its existence. The capital of Lebanon, Beirut, is the biggest city in the country followed by Tripoli in the North (***Figure 7***).

Figure 7: *Lebanon (https://geology.com/world/world-map.shtml).*

3.2 Population

The total population of the Mediterranean countries grew from 276 million in 1970 to 412 million in 2000 (1,35 % increase per year) and to 466 million in 2010. The population is predicted to reach 529 million by 2025. Four countries account for about 60% of the total population: Turkey (81 million), Egypt (72 million), France (62 million), and Italy (60 million) (Plan Bleu computations based on UNDESA 2011). Overall, more than half the population lives in countries on the southern shores of the Mediterranean, and this proportion is expected to grow to three quarters by 2025 (UNEP/MAP/MED POL 2005). The Mediterranean region's population is concentrated near the coasts. More than a third live in coastal administrative entities totaling less than 12% of the surface area of the Mediterranean countries. The population of the coastal regions grew from 95 million in 1979 to 143 million in 2000. It could reach 174 million by 2025 (UN/MAP/BP/RAC 2005). The concentration of population in coastal zones is heaviest in the western Mediterranean, the western shore of the Adriatic Sea, the eastern shore of the Aegean - Levantine region and the Nile Delta. Overall, the concentration of population in the coastal zone is higher in the southern Mediterranean countries. This is also where the variability of the population density in the coastal zone is highest, ranging from more than 1000 people/km^2 in the Nile Delta to fewer than 20 people/km^2 along parts of coastal Libya[2].

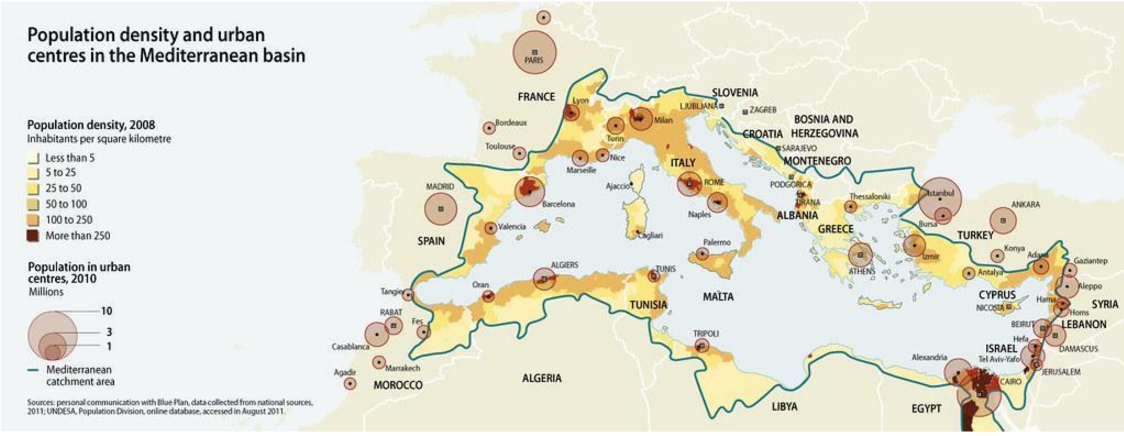


Figure 8: *Population density in the Mediterranean basin (GRID-Arendal).*

According to the “World Population Review”, the population of the Mediterranean countries for the year 2021 is as described in the following table (***Table 2***):

Country	Population 2021 (millions)
Egypt	104.258.327
Turkey	85.042.738
France	65.426.179
Italy	60.367.477
Spain	46.745.246
Algeria	44.616.624
Morocco	37.344.795
Syria	18.275.702
Tunisia	11.935.766
Greece	10.370.744
Israel	8.789.774
Libya	6.958.532

[2] **UNEP/MAP** (2013). State of the Mediterranean Marine and Coastal Environment.

Lebanon	6.769.146
Palestine	5.222.748
Croatia	4.081.651
Bosnia and Herzegovina	3.263.466
Albania	2.872.933
Slovenia	2.078.724
Cyprus	1.215.584
Montenegro	628.053
Malta	442.784
Monaco	3.9511
Gibraltar	3.3698

Table 2: *Population in the Mediterranean area (2021) (World Population Review).*

3.2.1 NEETs population in the Mediterranean region

The European Foundation for the Improvement of Working and Living Conditions (Eurofound, 2012) states that the future of Europe depends upon the 94 million Europeans aged between 15 and 29. The European Foundation for the Improvement of Working and Living Conditions (Eurofound, 2012) states that the future of Europe depends upon the 94 million Europeans aged between 15 and 29. In essence, this generation will have and will face the responsibility of an aging population, a fact that puts a lot of pressure on the governments that want and strive to ensure that young people evolve into highly skilled people, able to find jobs and contribute to human development. For this reason, young people need to be absorbed in the labor market, to be productive and to be properly integrated into society.

According to EUROSTAT, in the Mediterranean region the pattern of population change in most of the non-European Mediterranean countries was quite different that the European ones, insofar as the relative share of core working-age population continued to increase in most of the countries for which data are available, the only exception being Israel.

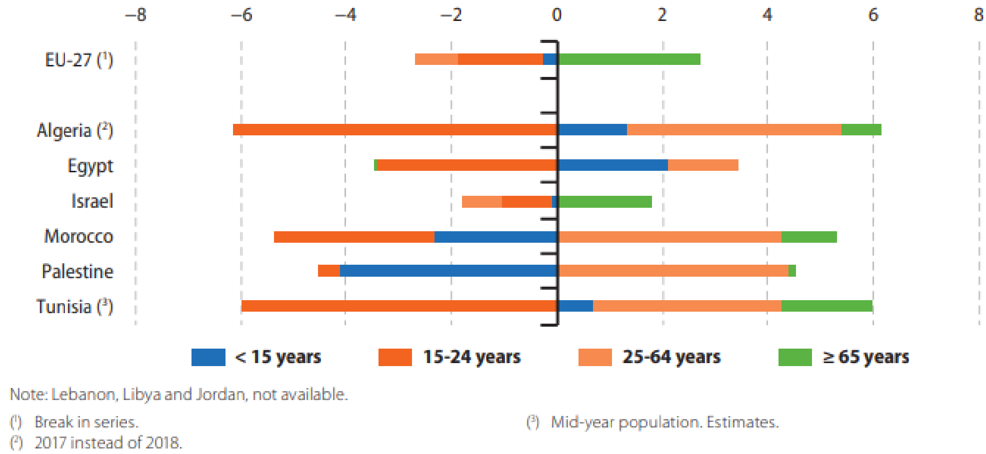


Figure 9*: Change in the age class structure of the population, 1 January 2008 – 2018 (percentage points) (Non-EU MED countries) (EUROSTAT).*

On the other hand, there were reductions in the relative shares of young people aged 15-24 years in all of the countries, for which data are available, often falling substantially. As for the elder part of the population, these countries were generally characterized by increasing percentages of older people in their population, although there was a very small contraction in Egypt. On the other hand, the population of children under the age of 15 was increased in Egypt, Algeria (between 2008 and 2017) and Tunisia, while it decreased significantly in Morocco and Palestine.

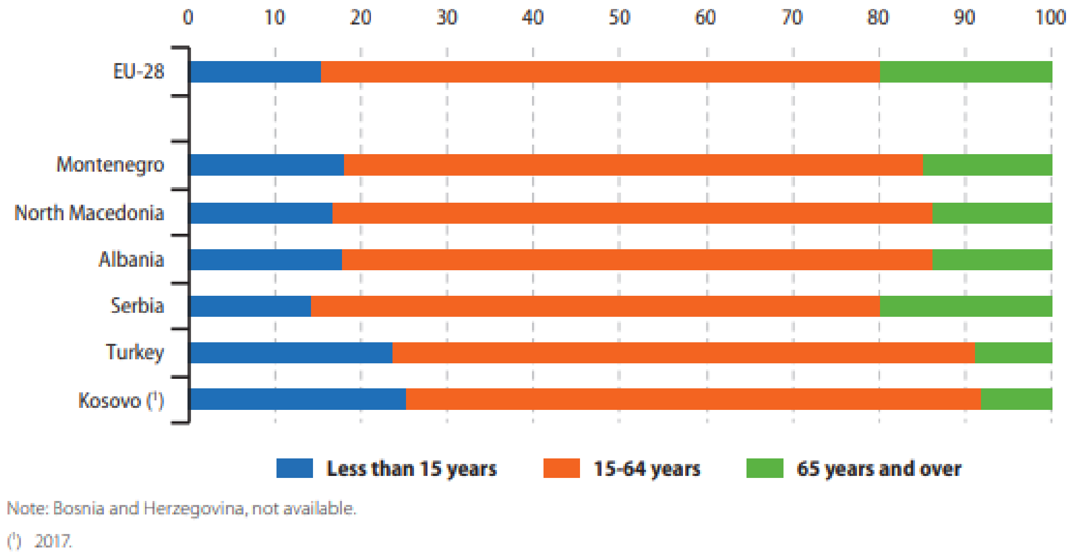


Figure 10*: Population by age class, 2018 (% of total population) (EUROSTAT).*

In Greece, the population aged 25- to 29-year-old has been significantly reduced from about 800.000 to 600.000 mainly due to the migration of young people during the socio-economic crisis; whereas, in the other age groups in focus the decrease is more moderate. Thus, the most active part of the labour force left the country, leading to great loss of human capital. Equally, the NEET rates - particularly for those aged 25 to 29 years old - respectively rose from about 25% (2006-2009) to about 40% (2013) which further illustrates the inevitability effects of the economic crisis. The OECD[3] for the year 2019 in Greece, 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%

On the other hand, the Spanish NEET population follows a stable pattern of development from 2008 to 2018 for the 15-19 age group; it presents though a significant reduction for the groups of 20-29 age group. The maximum NEET rate was recorded in 2012-2013, when the 20-29 age group picked in comparison with the youngest age group (15-19). Before the economic crisis, the country's inactive NEETs population almost equated to the unemployed young population. However, during the recession, most NEETs were unemployed, whereas recently an increment of inactivity is observed.

There is also the case of Italy, where the young NEET population remained almost stable during the years 2008-2018, even though a slight decrease is observed in 2013 for the 25-29 age group; nonetheless, no significant population decrease has occurred. This development may be the result of internal migration from the southern regions to the northern and more developed regions of the country as well as the more contained impact of the crisis compared to other southern countries (e.g., Greece).

NEETs 25-29		
Country	**2018**	**% change 2008-2018**
Greece	167.799	3%
Spain	514.835	-15%

[3] **OECD**: Organisation for Economic Co-operation and Development.

Italy	961.824	55%

***Table 3**: % Change of NEETs population between 2008 and 2018 (YOUTHShare (2019). NEETs in Mediterranean EEA 2008 - 2018: A Baseline Study)*

When it comes to the Palestinian population, we can tell that is a young society, as 38% of the population aged under 15 years at the end of 2020. There are distinct regional differences, as the population of young people in the West Bank was 36.0% compared to 41.2% in Gaza Strip. On the other hand, the percentage of the population aged 65 years and above was 3.4% - 3.6% in the West Bank and 2.8% in Gaza Strip.

In Lebanon, although population growth is recently declining, it has seen a rise in its population and some other strong indicators that can be used to build on for the future. It is also well noted the fact of an almost equal distribution of males and females in the different age groups. The NEETs population in Lebanon is as follows:

- Age 15-24 (women): 499.582 (48%)
- Age 15-24 (men): 523.380 (52%)
- Age 18-23 (total): 707. 34 (Change: -1.91%)

3.2.2 Cross-border area population factors

In the present section of the report, the key demographics and population factors of Skills4Sports cross-border area will be described, as presented in more detail in the previous activity, meaning the regional reports of the Project Partners. Almost all countries of the cross-border area show an increase of their population during the years, with the sole exception of Greece, which shows a population decline since 2005.

Greece

Greece has experienced a population decline since 2005, 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.

Malta

Malta has one of the highest population densities in the world, though the increase in the country's population has somewhat levelled off since the mid-20th century with a considerable decline in the birth rate. At the same time, the death rate has remained fairly stable, having fallen only slightly, while the infant mortality rate has dropped significantly. About one-third of the population is under 30 years old.

	2011	2012	2013	2014	2015	2016	2017
MALTA	**4 165**	**4 130**	**4 032**	**4 191**	**4 325**	**4 476**	**4 319**
Malta	**3 879**	**3 837**	**3 748**	**3 920**	**4 030**	**4 131**	**4 033**
Southern Harbour	761	734	694	707	722	724	738
Northern Harbour	1 131	1 154	1 128	1 204	1 251	1 235	1 183
South Eastern	730	715	683	662	719	711	679
Western	569	550	523	544	556	602	542
Northern	688	684	720	803	782	859	891
Gozo and Comino	**284**	**293**	**284**	**271**	**295**	**345**	**286**
Gozo and Comino	284	293	284	271	295	345	286
Residence unspecified	**2**	-	-	-	-	-	-

Source: Identity Malta

Table 1. *Total resident live births by parents' region/district of residence and year (Source: Malta Report 2020).*

Italy

Italy's population has almost been doubled during the 20th century, but the pattern of growth was extremely uneven because of large-scale internal migration from the rural South to the industrial cities of the North, a phenomenon which happened as a consequence of the Italian economic miracle of the 1950–1960s. High fertility and birth rates persisted until the 1970s, after which they started to decline. The population rapidly aged; by 2010, one in five Italians was over 65 years old, and the country currently has the fifth oldest population in the world, with a median age of 46.5 years. However, in recent years Italy has experienced significant growth in birth rates. The total fertility rate has also climbed from an all-time low of 1.18 children per woman in 1995 to 1.41 in 2008, albeit still below the replacement rate of 2.1 and considerably below the high of 5.06 children born per woman in 1883. Nevertheless, the total fertility rate is expected to reach 1.6–1.8 in 2030.

Italy's age structure (estimated 2020)[4]:		
Age range	**Male**	**Female**
0-14 years: 13.45%	4.292.431	4.097.732
15-24 years: 9.61%	3.005.402	2.989.764
25-54 years: 40.86%	12.577.764	12.921.614
55-64 years: 14%	4.243.735	4.493.581
65 years and over: 22.08%	5.949.560	7.831.076

Table 1. *Italy's age structure.*

Spain

The population of Spain in 2020 was 46.754.778, based on Worldometer elaboration of the latest United Nations data. The population density in Spain is 94 per Km^2. Catalonia's population totaled 7.672.699, with 3.768.981 men and 3.903.718 women, marking a 0.96 % increase over the previous year's figures, according to the data from the municipal register in January 2019. The population density is 238.97 inhabitants per km^2. The non-national population residing in Catalonia accounts for 15.09% of the total, 6.97% higher than in the previous year. Catalonia accounts for 16.32% of the total Spanish population (Source: https://ec.europa.eu/eures).

Palestine

Palestine has a population of 5.164.173 (3.086.816 in West Bank and 2.077.375 in Gaza) as of end of 2020[5], ranked 121st in the world. The total area of Palestine is 6,024.82 km^2 (5,659.91 West Bank and 364.91 Gaza) with a population density (Capita/km^2) of 857 (545 West Bank and 5,693 Gaza)[6]. The estimated number of the population of the Palestinians in the State of Palestine at the end of 2020 was

[4] https://www.indexmundi.com/italy/age_structure.html#:~:text=Italy%20Age%20structure%20Factbook%

[5] **Palestinian Central Bureau of Statistics**, 2021. Palestine in Figures 2020. 26 Ramallah – Palestine.

[6] Ibid

5.2 million: 3.1 million in the West Bank (59.8%) and 2.1 million (40.2%) in Gaza Strip. The highest population was in Hebron Governorate with 15.0% of the total population, followed by Gaza Governorate with 13.6% and Jerusalem Governorate with 9.0%. Jericho and Al - Aghwar Governorate had the lowest population percentage of 1.0%. Data of the Population, Housing and Establishments Census 2017 showed that 42.2% of the total Palestinian population in the State of Palestine are refugees; as their number is estimated at 1.98 million: 741 thousand in the West Bank (26.3% of the total population of the West Bank) and 1.24 million in Gaza Strip (66.1% of the total population of Gaza Strip).

Lebanon

Lebanese population has been increasing steadily since 1990, rising from 2.802.032 in 1990 to 6.825.442 in 2020. This indicator would typically boost economic productivity, production and other economic indicators. The fertility rate in Lebanon follows a steady trend from 2010 to 2019, increasing from 1.966 births per woman to 2.075 in 2019. NEETs make up 16% of the population while 25-54 years make up the majority of 45%. Beirut's population increased from 1.990.000 in 2010 to 2.434.609 people, with an average annual change of 0.42%; while Tripoli's population is around 230.000 people (World population Review, 2021).

Country	Population
Greece	10.423.054
Malta	441.543
Italy	60.461.826
Spain	46.754.778
Palestine	5.101.414
Lebanon	6.825.445

Table 1. *Cross-border area population 2020 (Worldometer).*

3.3 Economic system and labour market

The Mediterranean region's economic significance is multidimensional, as it is one of the world's most important seas. Mediterranean countries account for 7% of global population and 10% of global GDP. However, political upheaval and conflict have frequently impeded the region's progress and economic integration. The Mediterranean's regional economic linkages manifest two dominant features: on the one hand, there is the marked heterogeneity of the countries' performance in foreign trade, investment flows and energy (oil and gas) potential; on the other hand, there is the strong north-south element that shapes all intra-regional flows. These characteristics suggest that, despite inadequate regional integration, opportunities exist to develop intra-regional links as the Mediterranean region continues to integrate into the global economy and benefits from long-standing multilateral and cooperative frameworks. The Mediterranean Sea, although it represents only 1% of the world's seas, is equivalent to 20% of the global annual gross marine product (GMP). Italy made the largest contribution to the Mediterranean GMP, followed by Spain, France and Turkey.

Europe, North Africa, and the Middle East all have a geostrategic environment dominated by the Mediterranean. The Mediterranean Sea, which stretches from the eastern beaches of Asia to the western borders of the Atlantic Ocean, separating Europe from Africa and connecting the marine basins of the Sea of Marmara and the Black Sea, is a major asset both locally and regionally. The Mediterranean has facilitated trade and cooperation, regulated climate, given nutrients, and fueled economic progress for millennia. Tourism accounts for 11% of the Mediterranean region's GDP and is predicted to expand at a rate of 2.9 percent per year over the next decade, with related jobs growing at a rate of 2.8 percent per year.

The Mediterranean region consists of 23 countries - 13 EU member states and 10 Mediterranean partners such as Algeria, Egypt, Israel, Jordan, Lebanon, Morocco, Palestine, Syria, Tunisia and Turkey. The largest economy among the Southern Mediterranean partner countries was Israel with GDP valued at EUR 313 billion in 2018, while the economy of Egypt was a little more than half this size (EUR 173 billion; 2017 data), followed by Algeria (EUR 147 billion) and Morocco (EUR 100 billion). The other Mediterranean partner countries' economies for which recent data are available were notably smaller: Lebanon's economy (EUR 47.3 billion; 2017 data) was less than half the size of that of Morocco, while Jordan's (EUR 35.4 billion; 2016 data) and Palestine's (EUR 12.4 billion) were the smallest. Older data for Tunisia (EUR 38.9 billion; 2015 data) show economic output between those of Jordan and Lebanon while Libya's GDP (EUR 65.0 billion; 2012 data) was closer to that of Morocco.

	2008	2010	2012	2014	2016	2018
Algeria[1]	116.4	120.9	158.7	161.2	144.5	146.5
Egypt[1, 2]	112.1	161.9	215.2	226.5	244.2	172.7
Israel	147.5	176.6	200.1	233.3	288.3	313.4
Jordan	20	23.9	27.9	32.5	35.4	
Lebanon[2]	19.9	29	34.3	36.3	46.3	47.3
Libya[1]	49.8	51.7	65	:	:	:
Morocco	63.2	70.4	76.4	83	93.4	99.8
Palestine	4.5	6.7	8.8	9.6	12.1	12.4
Tunisia[1, 3]	30.5	33.2	35.1	35.8	38.9	:

1: Based on the 1993 system of national accounts
2: 2017 instead of 2018
3: 2015 instead of 2016

Figure 11: *Gross domestic product for South MED countries, 2008 – 2018 (in billions EURO) (EUROSTAT).*

	2007	2009	2011	2013	2015	2017
Montenegro	2.7	3.0	3.3	3.4	3.7	4.3
North Macedonia	6.1	6.8	7.5	8.1	9.1	10.0
Albania	7.8	8.7	9.3	9.6	10.3	11.6
Serbia	31.6	32.5	35.4	36.4	35.7	39.2
Turkey	492.8	461.9	596.5	714.3	773.0	753.9
Bosnia and Herzegovina[1]	11.5	12.7	13.4	13.7	14.6	15.3
Kosovo	:	4.1	4.8	5.3	5.8	6.4

1: 2016 instead of 2017

Figure 12: *Gross domestic product, 2007 – 2017 (in billions EURO) (EUROSTAT).*

	2015	2016	2017	2018	2019
France	2,198.432	2,234.129	2,295.063	2,353.090	2,425.708
Italy	1,655.355	1,695.787	1,736.593	1,771.566	1,790.942
Spain	1,077.59	1,113.84	1,161.878	1,202.193	1,244.772

Greece	176.11	174.237	177.152	179.727	183.414
Croatia	44.612	46.619	49.239	51.950	54.238
Slovenia	38.853	40.367	42.987	45.755	48.392
Cyprus	17.884	18.929	20.120	21.433	22.287
Malta	9.997	10.589	11.704	12.587	13.592

***Figure 13**: Gross domestic product 2015 – 2019 (in billions EURO) (Gross domestic product at market prices (Current prices and per capita) - Eurostat).*

A major contributor to regional GDP, the Mediterranean Sea currently generates massive economic value through its natural ecosystems and maritime resources; key economic sectors born of the sea include tourism, fisheries and aquaculture, transport and logistics, shipbuilding and recycling, energy, bioprospecting and deep-sea mining[7].

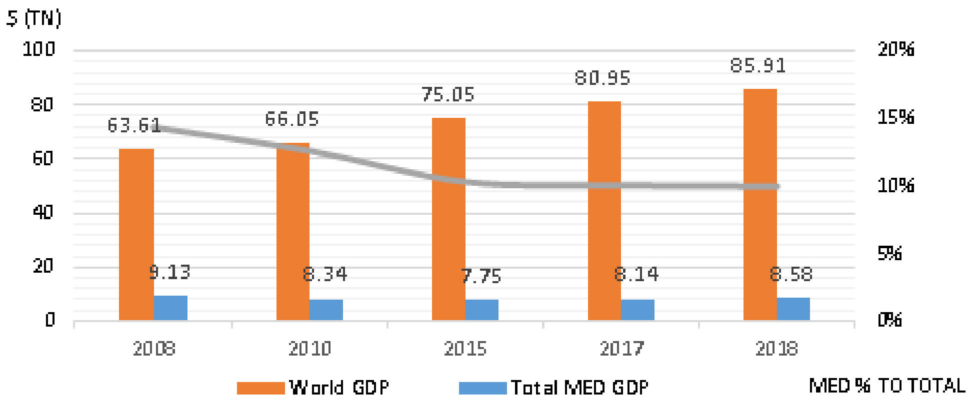


***Figure 14**: Mediterranean GDP (World Development Indicators, World Bank, last updated: 10 October 2020).*

The Mediterranean's underperformance in regional economic cooperation can be attributed to structural weaknesses (such as a lack of economic diversification among primarily Southern Mediterranean partners) as well as trade impediments such as non-tariff barriers (such as high trade costs linked to poor logistics and high infrastructure costs) or an insufficient regulatory framework. Thus, far from being an integrated region, the Mediterranean is shaped by bilateral and sub-regional links. Political uncertainty and security threats remain the most pervasive barriers to intra-regional

[7] **Randone, M. et al.**, (2017). Reviving the Economy of the Mediterranean Sea: Actions for a Sustainable Future, WWF Marine Initiative, WWF Report (2017).

integration. Most recently, regional interdependence has been harmed by the wars in Libya and Syria, as well as economic sanctions and other restrictive measures imposed unilaterally or collectively, which have disrupted the configuration of economic flows. As a result, in addition to addressing structural weaknesses in local economies and managing the new dynamics in the global economy, governments must also overcome political barriers to regional economic growth.

Today, the region is distinguished by the high degree of diversity among its coastal countries, as well as institutional and political heterogeneity, uneven economic development, wealth disparities, and a complex security environment. The differences are largely divided along a north-south axis, with the northern shores of the sea characterized by advanced, stable EU-integrated societies, while the southern shores suffer from poor socioeconomic indicators and instability. In general, the main characteristics of the labour market for the Mediterranean region are the following – in frames of Skills4Sports:

- High NEETs' rates
- Labour markets hardly-hit by the financial crisis
- Regional economies highly dependent on particular (resilient) economic sectors
- Insufficient youth employment policies

The youth unemployment in the Mediterranean region, it is a well-known fact that in all Mediterranean countries the current rates are at an alarmingly high level. Even before the economic crisis of 2008 each of those countries already had high unemployment rates and during and after the crisis youth unemployment increased sharply, especially in Greece and Spain. At the end of 2012 youth unemployment was above 50% in both countries, 55% percent in Spain and even 58.1% percent in Greece. The rate in Italy was almost 40%, but in France it was only slightly higher than the EU average. In 2013 the youth unemployment rates continued to rise by 0.1 percentage points in the EU, as well as in Spain (+1.7 percentage points) and Italy (+2.9 percentage points). In Greece youth unemployment remained quite stable at 58% (-0.1). In France the unemployment rate decreased in 2013 to 25.2% in the third quarter[8].

Southern and Eastern Mediterranean countries continue to have unemployment rates that are twice as high as the global average, ten years after the global economic downturn of 2008. In 2018, their average unemployment rate was 11%, compared to a

[8] **W. Eichhorst** (2014). Youth Unemployment in Mediterranean Countries.

global average of 5%, according to ILO[9] estimates. This phenomenon primarily affects the young, who face unemployment rates that are two or three times higher than the general population average and the situation does not appear to be improving. In most cases, youth unemployment rates were higher in 2018 compared to 2015, with three countries above the 30% threshold, namely Egypt, Tunisia and Jordan, which registered an astonishing 40% of youth unemployment during 2018. The only exception is Morocco which is the only country where the youth unemployment started decreasing from 2016 onwards, whilst in Lebanon, the other country with rates sensibly lower than its peers, the situation worsened further. "Not in education, employment or training" (NEET) rates are also very high according to the existing data. In the year 2017, Algeria and Egypt, the only countries for which ILO estimates are available, registered NEET rates of 21% and 27% respectively.

These countries of the Mediterranean region, Southern and Eastern Mediterranean countries, are experiencing a rapid growth in their working age populations. Almost 60% of the regional population is under the age of 30 and the number of young people under the age of 15 is forecasted to increase over 18% by 2020. This is a benefit to the region, and as a result, a positive and action-oriented regional agenda on youth employability is required to unlock the region's human and economic potential capital. In conclusion, priority actions must be built on promoting competitiveness and enhancing job opportunities, particularly for youth, through education and employment, vocational training initiatives, and improved connectivity, as required for regional peace and stability.

The most important reason that leads to unemployed young people is the dysfunctional relationship between education systems and labour markets. The concept of mismatch is especially useful for this purpose. In the absence of mismatches, education systems should provide future job seekers with the skills required by the labour market (qualitative match) and labor markets should create enough jobs to absorb all job seekers exiting the education system (quantitative match). The problem is that the skills required in the labour market usually differ from those job seekers are equipped with by the education system and the number of job seekers coming out of the education system exceeds the number of available jobs in the labour market and those who fail to compete successfully for available jobs will eventually become unemployed, even if they are equipped with the right skills. The current state of chronic unemployment is due to an excess of job seekers relative to available positions, as well as a dearth of qualified people to fill those jobs.

[9] **ILO**: International Labour Organization.

The latest records concerning the unemployment rates in the Mediterranean region are referring to the years 2009-2015 and are being describing in the following tables[10] (***Table 8 & 9***):

	Youth (< 25 years)		Long-term (>= 12 months) (1)		With tertiary education (25-64 years) (2)	
	2010	**2015**	**2010**	**2015**	**2010**	**2015**
Montenegro (3)	43,7	37,6	15,5	13,6	:	9,4
North Macedonia	53,7	47,3	26,7	21,3	19,3	18,9
Albania	30,5	39,8	10,6	11,3	7,9	15,9
Serbia	46,1	43,2	13,3	11,3	12	14,4
Turkey	19,9	18,4	3	2,2	7,2	8,4
Bosnia & Herzegovina	57,5	62,3	22,3	22,8	13,2	16,4
France	24,7	26,1	2,4	3,1	4,7	5,7
Italy	27,9	40,3	4	6,9	5,5	6,8
Spain	41,5	48,3	7,2	11,4	10,4	12,4
Greece	33	49,8	5,7	18,3	8,8	19
Croatia	32,4	42,3	6,4	10,3	7,9	8,9
Slovenia	14,7	16,3	3,2	4,8	4,1	5,7
Cyprus	16,6	32,8	1,3	6,9	4,6	10,7
Malta	13,2	11,6	3,7	2,6	:	1,6
Algeria (4)	21,5	30	6,4	8,4	20,3	14,1
Egypt (5)	24,8	26,5	7,7	11,8	18,9	20
Israel (6)	13,7	9,3	1,6	0,7	4,4	3,8
Jordan	33	32,1	:	:	:	:
Lebanon (7)	16,8	:	:	:	8,8	11,4
Morocco	17,6	20,8	5,7	6,3	17,4	21,1
Palestine	18,8	40,7	12,4	15,5	24,1	31,8
Tunisia (8)	29,4	34,7	:	:	22,9	30,2

Table 8: *Unemployment rates for the Mediterranean region, 2010 – 2015 (EUROSTAT).*

Note: the youth unemployment rate is the percentage of the unemployed in the age group 15–24 years old compared with the total labour force among those aged 15–24. It should be remembered that a large share of people between these ages are outside the labour market (since many people are studying full time and thus are not available for work), which explains — at least in part — why youth unemployment rates are often higher than overall unemployment rates. Long-term unemployment refers to the number of people who are out of work and have been actively seeking employment for at least a year. The unemployment period

[10] **EUROSTAT** (2016). Labour force statistics for the Mediterranean region (2016 edition).

is defined as the duration of a job search, or as the length of time since the last job was held (if shorter than the time spent on a job search)[11].

([1]) EU-28, candidate countries and potential candidates: persons aged 15–74. ENP-South countries: persons aged 15–64.

([2]) EU-28, candidate countries and potential candidates: persons aged 25–64. ENP-South countries: persons aged 15–64.

([3]) Youth unemployment rate: 2012 instead of 2010.

([4]) Youth unemployment rate: persons aged 16–24. Long-term unemployment rate and unemployment rate for persons with tertiary education: persons aged 16–59.

([5]) 2014 instead of 2015.

([6]) Break in series.

([7]) 2009 instead of 2010. 2012 instead of 2015.

([8]) 2013 instead of 2015.

	Youth unemployment (< 25 years)			
	2016	**2017**	**2018**	**2019**
Montenegro	35,9	31,7	29,4	25,2
North Macedonia	48,2	46,7	45,4	35,6
Albania	:	:	:	:
Serbia	34,9	31,9	29,7	27,5
Turkey	19,5	20,5	20,2	25,2
Bosnia & Herzegovina	:	:	:	:
France	26	23,5	22	20,7
Italy	37,8	34,7	32,2	29,2
Spain	44,4	38,6	34,3	32,5

[11] The youth unemployment rate is defined as the percentage of unemployed people within the age group 15-24 years compared with the total labour force of the same age. It is important to note that a relatively large share of this subpopulation may be outside the labour market (since many youths study full-time and are therefore not available for work). In 2018, almost one sixth (16.1 %) of the EU-27 labour force aged 15-24 was without work. The youth unemployment rate was more than double the overall unemployment rate (7.3 %) for the whole of the labour force (aged 15-74). In 2018, the highest youth unemployment rates in the ENP-South countries were recorded in Palestine (46.7 %), Tunisia (34.4 %; 2019 data) and Jordan (32.1 %; 2015 data). Most of the other ENP-South countries for which data are available also had youth unemployment rates considerably above the EU-27 average. By contrast, the youth unemployment rate in Israel (7.2 %) was less than half the rate in the EU-27.

Greece	47,3	43,6	39,9	35,2
Croatia	31,3	27,4	23,7	16,6
Slovenia	15,2	11,2	8,8	8,1
Cyprus	29,1	24,7	20	16,6
Malta	10,7	10,6	9,1	9,3
Algeria	26,7	28,3	:	:
Egypt	25,6	29,6	24,8	:
Israel	8,6	7,3	7,2	:
Jordan	:	:	:	:
Lebanon	:	:	:	:
Morocco	22,5	26,5	:	:
Palestine	42,1	44,7	46,7	:
Tunisia	:	:	:	:

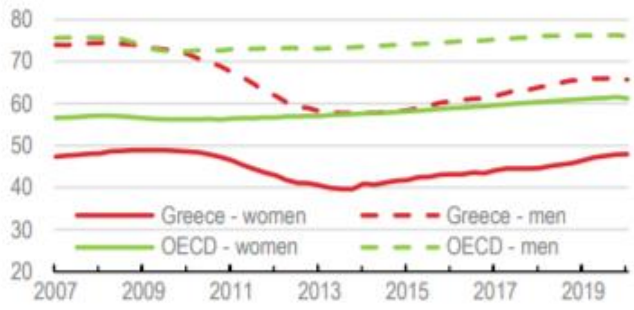
***Table 9**: Youth unemployment rate at the MED region, 2016 - 2019 (EUROSTAT).*

3.3.1 Cross-border area economic system and labour market

The characteristics of the labour market for the Mediterranean region differ from country to country, particularly with regard to European countries with those which do not belong to Europe. The labour market characteristics of the cross-border area of Skills4Sports have been fully described by the Project Partners in their regional reports. The main characteristics described in the previous Activity for the cross-border area, are given in the following pages of the present report.

Greece

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.



Source: OECD *Main Economic Indicators* database.

Figure 14: *Employment rates in Greece (2007 -2019).*

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.

Malta

In comparison with Greece's economic situation, by 2018, Malta's economy kept growing faster than the EU average, supported by a thriving services sector. The most important sectors of Malta's economy in 2018 were wholesale and retail trade, transport, accommodation and food services (21.0%), public administration, defense, education, human health and social work activities (16.8%) and Arts, entertainment and recreation; other service activities; activities of household and extra-territorial organizations and bodies (15.0%). The services sector continues to grow rapidly, but companies face increasing difficulties in access to finance. The services sector continues to enjoy solid growth. Tourism continues to grow all year-round, albeit at a slower pace than in recent years. Productivity has significantly improved, but research and innovation still play a limited role in the economy. Malta has experienced significant growth in investment and productivity experienced a sizeable growth in the past decade. Small and medium-sized enterprises are the main contributors to economic growth and employment. Since the global recession that took hold around the first decade of this century, Malta registered a more favorable economic performance than most other euro area countries. In recent decades Malta's gross domestic product (GDP) has steadily risen and converged towards those of the advanced economies of the European Union (EU). Thus, while in 1980 Malta's GDP per capita stood at just 48% of Germany's, Europe's leading economy, by 2014 it had risen to 68%.

Labour market indicators	**2014**	**2015**	**2016**	**2017**	**2018**	**2019** [5]
Activity rate (15-64)	67.8	68.9	70.6	72.2	74.7	75.8
Employment in current job by duration						
From 0 to 11 months	9.9	10.3	12.4	13.9	15.1	:
From 12 to 23 months	10.7	10.1	11.6	12.4	14.2	:
From 24 to 59 months	18.9	19.7	18.7	19.6	20.1	:
60 months or over	59.4	59.0	57.3	54.0	50.3	:
Employment growth* (% change from previous year)	5.4	4.1	4.3	8.1	5.7	5.1
Employment rate of women (% of female population aged 20-64)	54.3	55.3	58.0	60.6	64.1	66.8
Employment rate of men (% of male population aged 20-64)	81.1	82.1	83.5	84.7	86.0	86.3
Employment rate of older workers* (% of population aged 55-64)	39.5	42.3	45.8	47.2	50.2	51.2
Part-time employment* (% of total employment, aged 15-64)	15.3	14.3	13.9	13.7	13.2	12.5
Fixed-term employment* (% of employees with a fixed term contract, aged 15-64)	7.7	7.5	7.6	6.0	7.9	8.7
Transition rate from temporary to permanent employment (3-year average)	12.9	15.0	:	:	27.0	:
Youth unemployment rate (% active population aged 15-24)	11.7	11.6	10.7	10.6	9.1	9.2
Gender gap in part-time employment	21.1	20.0	19.7	18.0	15.5	15.7
Gender pay gap(2) (in undadjusted form)	10.6	10.4	11.0	12.2	:	:
Education and training indicators	**2014**	**2015**	**2016**	**2017**	**2018**	**2019**
Adult participation in learning (% of people aged 25-64 participating in education and training)	7.7	7.4	7.8	10.6	10.9	:
Underachievement in education(3)	:	29.1	:	:	:	:
Tertiary educational attainment (% of population aged 30-34 having successfully completed tertiary education)	28.6	29.1	32.0	33.5	34.7	:
Variation in performance explained by students' socio-economic status(4)	:	14.5	:	:	:	:

* Non-scoreboard indicator
(1) Long-term unemployed are people who have been unemployed for at least 12 months.
(2) Difference between the average gross hourly earnings of male paid employees and of female paid employees as a percentage of average gross hourly earnings of male paid employees. It is defined as "unadjusted", as it does not correct for the distribution of individual characteristics (and thus gives an overall picture of gender inequalities in terms of pay). All employees working in firms with 10 or more employees, without restrictions for age and hours worked, are included.
(3) PISA (OECD) results for low achievement in mathematics for 15 year-olds.
(4) Impact of socio-economic and cultural status on PISA (OECD) scores.
(5) Average of first three quarters of 2019. Data for youth unemployment rate is seasonally adjusted.
Source: Eurostat, OECD

Table 2. *Malta Labour market indicators (Source: EU report Malta 2020).*

The COVID-19 pandemic was having an acute impact in 2020 on critical sectors of Malta's economy including tourism and external trade, leading to a temporary and limited increase in the unemployment rate. A modest recovery is forecast in 2021 and 2022 but considerable uncertainty surrounds the evolution of the pandemic and the impact of the change to less beneficial trading relations between the UK and the EU. After a major crisis-induced plunge in 2020, the general government balance is set to gradually improve, while public debt is expected to peak at 60% of GDP in 2021. The unemployment rate has declined to 5.3% in 2015, with Malta being one of just three countries in the EU that registered a decline in the unemployment rate compared to the pre-crisis level. Additionally, various estimates point to a downward trend in the structural unemployment rate that started in the mid-2000s[12].

Italy

Italy is a highly developed country, with the world's 8th highest quality of life in 2005 and the 26th Human Development Index. Italy is part of a monetary union, the Eurozone and of the EU single market. The country is well known for its creative and innovative business, a large and competitive agricultural sector (with the world's largest wine production), and for its influential and high-quality automobile, machinery, food, design and fashion industry. Italy is the world's sixth largest manufacturing country, characterized by a smaller number of global multinational corporations than other economies of comparable size and many dynamic small and medium-sized enterprises, notoriously clustered in several industrial districts, which are the backbone of the Italian industry. Italy has a strong cooperative sector, with the largest share of the population (4.5%) employed by a cooperative in the EU.

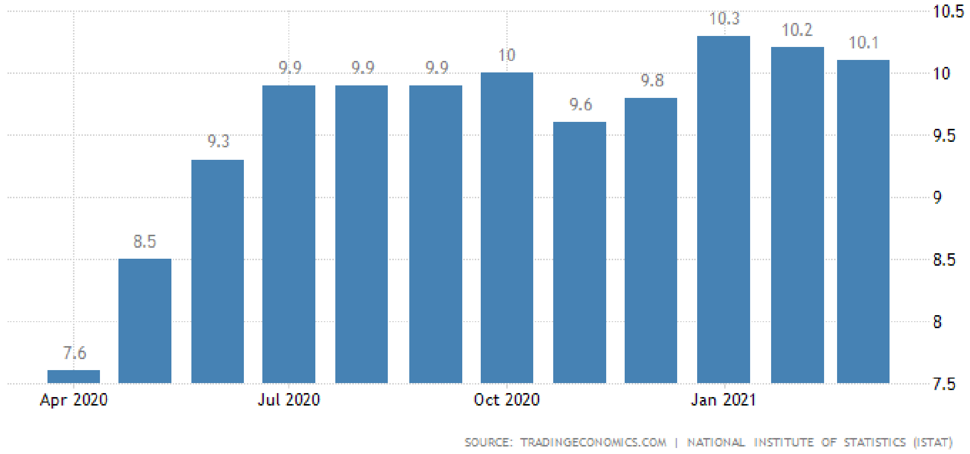


***Figure 15**: Italy's unemployment rate: historical trends.*

[12] Understanding the Maltese economy.pdf , p.21.

A gaping North–South divide is a major factor of socio-economic weakness. It can be noted by the huge difference in statistical income between the northern and southern regions and municipalities. The richest province, Alto Adige-South Tyrol, earns 152% of the national GDP per capita, while the poorest region, Calabria, 61%. The unemployment rate (11.1%) stands slightly above the Eurozone average, but the disaggregated figure is 6.6% in the North and 19.2% in the South. The youth unemployment rate (31.7% in March 2018) is extremely high compared to EU standards. In Italy, for the year 2019 about 13.5% of residents aged 18-24 left school with only the middle school certificate, recording a rate among the highest in Europe, surpassed only by Spain, Malta, Romania and Bulgaria. In 2019, NEETs accounted for 23.2% of residents aged 18-24. An extremely worrying figure, considering that we are talking about almost 1 in 4 young people.

Italy has been hit hard by the financial crisis of 2007–08, which exacerbated the country's structural problems. The political efforts to revive growth with massive government spending eventually produced a severe rise in public debt, ranking second in the EU only after the Greek one. For all that, the largest chunk of Italian public debt is owned by national subjects, a major difference between Italy and Greece, and the level of household debt is much lower than the OECD average.

Spain

In Spain, the bulk of the employed population works in the services sector (75.00 %), followed by industry (17.90 %), construction (5.52 %) and agriculture (1.58 %). With more than 7.5 million inhabitants, the Autonomous Region of Catalonia is the second most populous region in Spain, representing 16% of its total population. Catalonia is the main contributor to the Spanish economy, with nearly 19% of Spain's GDP. The GDP per capita is higher than the European Union average (EU-27) (Source: OECD Review of higher education in Regional and City Development).

The above-mentioned data were the tendency before the COVID-19 pandemic. The outbreak of the pandemic had an enormous impact on the worldwide economy and Catalonia was not an exception. The high dependence on tourism and to the service industry has had a deep effect, as there are sectors highly impacted by the economic downturns, such as tourism, the sports industry, construction, etc. One would have to go back to the Civil War to find such a significant decline. Catalonia's gross domestic product (GDP) fell by 11.4% in 2020. The impact of the pandemic on the Catalan economy was greater than that of the Spanish and European economies. The Community GDP fell five points less than the Catalan economy (-6.4% EU-27), while the advance of the Spanish GDP given by the INE (-11%) is four tenths of a percentage point less than the decline of the Catalan GDP.

Catalan GDP could grow by 6% in 2021, recovering only half of what was lost in 2020. In 2022 the upward trend will continue at a similar rate than 2021 (6.1%) and the recovery of the economy will be by the end of the year approaching the pre-pandemic level of 2019. Therefore, it will be a recovery spread over two years. As for the labor market, the forecasts states to a growth of the number of employees (3.8%, compared to one 9% drop in 2020), which will not prevent an unemployment rate growth (12.6% in 13.5%), given the atypical evolution of these magnitudes, affected by ERTOs (temporary mechanism for adjusting companies "labor costs" for those people that could not work, implanted from march 2020 until 2021). In March 2021 the number of unemployed in Catalonia was 27.8% higher than in March 2019, before the pandemic according to the Cambra de Comerç de Barcelona, the trade chamber of Barcelona. In the under-25 group, unemployment has risen by more than 43% in the last year and leaves without employment a final balance of 41.879 young people, 12.602 more than a year ago.

Palestine

In Palestine, the economy suffers ongoing shocks as a direct result of the 1993 Paris Protocol of Economic Relations (PER), which integrates the Palestinian and Israeli economies through a customs union, "the primary characteristic of which is the absence of economic borders between members[13]". The protocol concerns 6 major areas: customs, taxes, labour, agriculture, industry, and tourism[14]. In 2020, a sharp decline in the value of GDP was recorded in Palestine which reached 11.5%, compared to 2019[15]. It decreased by 11.3% in the West Bank compared to a decline of 12.3% in Gaza Strip. This is due to the impact of the COVID-19 pandemic on the Palestinian economy, which started on March 2020. Hence, such factors led to a decline in the value of per capita GDP by 13.7% compared to 2019, as a result of the natural

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[13] **The Paris Protocol.** Betselem. January 1, 2011.
http://www.btselem.org/freedom_of_movement/paris_protocol.

[14] **THE ISRAELI-PALESTINIAN INTERIM AGREEMENT**-Annex V. September 28, 1995.

http://www.mfa.gov.il/MFA/ForeignPolicy/Peace/Guide/Pages/THE%20ISRAELIPALESTINIAN%20INTERIM%20AGREEMENT%20%20Annex%20V.

aspx

[15] **Performance of the Palestinian Economy**, 2020. Palestinian Central Bureau of Statistics, 2021. Ramallah –Palestine.

growth of the population. During 2020, the labour market indicators showed that the labor force decreased by 5.6% reaching 1.217 thousand individuals, while the participation rate in the labour force decreased to 41.3%. This was accompanied with a decrease in the number of employed individuals by 6.8% and the unemployment rate increased in Palestine reaching 27.2% in 2020 compared to 26.3% in 2019. The overall unemployment rate for youth (15–24-year-old) increased from 31% to 35%. Rates are highest in Gaza Strip region and governorates, and lowest in the West Bank region, notably in Tubas & Northern Valleys, Salfit and Ramallah and Al-Bireh.

Lebanon

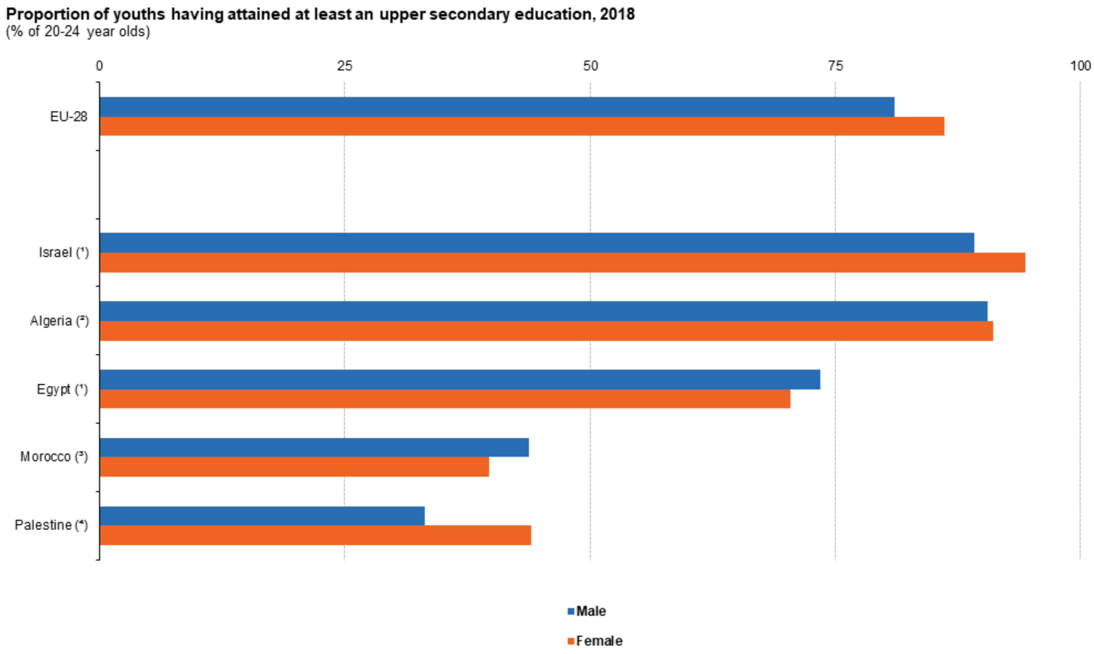
Lebanon today is facing one of the worse political and economic crises in its history as a nation. The investment climate after 1990 severely damaged the state's functioning, leaving a very high debt; Inflation reached triple-digit while the exchange rate keeps losing value; poverty is rising sharply. The United Nations has released several reports and taken action regarding the effects of this crisis on the Lebanese society as a whole, especially the young and NEETs. The service sector holds 86% of the total GDP, while manufacturing and agriculture have 2.7% and 2.5% respectively. Recent drastic events have increased the depth of the problem, as evident today. According to the Ministry of Finance, Lebanon, the government Budget decreased to -16.50% GDP in 2020 from -10.50% GDP in 2019. The COVID-19 pandemic further increased the problem by affecting tourism, remittance from Lebanon in diaspora, travel restrictions, country lockdown and strongly affecting local business and payment of salaries. The following table (***Table 5***). portrays the unemployment rate in contrast to the total labour force in Lebanon. It clearly illustrates the decline in the labor force and rise in unemployment.

	2015	**2016**	**2017**	**2018**	**2019**	**2020**
Labor Force	2,221,024	2,296,526	2,348,425	2,387,681	2,432,712	2,317,840
Unemployed (%)	6.31%	6.26%	6.18%	6.10%	6.04%	6.61%
Unemployed	140,146	143,762	145,132	145,648	146,935	153,209

Table 5: *Labor Force and Unemployment %.*

3.4 Education system

The education systems in the Southern and Eastern Mediterranean countries continue to face two major challenges. First, governments have focused their efforts on expanding education systems while paying little attention to public accountability, that is, governments have worked to increase the number of schools, teachers, and students enrolled in the education system without paying enough attention to the system's quality and efficiency. Second, there is an inconsistency between educational outcomes and labor market demand. As described before, the region's labour markets have been unable to absorb all of the graduates, resulting in greater unemployment rates in most of the region's countries.



Note: ranked on the average for all youths aged 20-24. Jordan, Lebanon and Tunisia: not available.
(¹) 2017.
(²) 2015.
(³) 2016.
(⁴) This designation shall not be construed as recognition of a State of Palestine and is without prejudice to the individual positions of the Member States on this issue.
Source: Eurostat (online data code: edat_lfse_03)

eurostat

***Figure 16**: Proportion of youths having attained at least an upper secondary education, 2018 (% of 20–24-year-old) (EUROSTAT).*

According to EUROSTAT, the share of the population aged 20-24 that attained at least an upper secondary educational level - referred to as the youth education attainment level - was 83.5% in the EU-28[16] in 2018; 81% of men and 86.1% of women aged 20-24 years had attained at least an upper secondary level of education. Recent data for the ENP-South countries[17] show that the highest rate of youth educational attainment for men was 90.6% in Algeria (2015 data), while for women it was 94.4% in Israel (2017 data). The rates for women in Algeria and for men in Israel were also higher than the equivalent rates recorded across the EU-28. Among the remaining ENP-South countries for which data are available, the level of youth educational attainment was consistently lower than the EU-28 average both for men and for women.

Palestine recorded the biggest gender gap (10.9 percentage points) in favor of young women for this level of educational attainment in 2018, while Morocco recorded the biggest gap (4.1 points; 2016 data) in favor of young men.

Algeria and Morocco's educational systems have undergone a number of changes. Education has evolved from a privilege reserved for the wealthy to a right enjoyed by all residents. In Algeria, Arabic has overtaken French as the primary and secondary language of education, while French remains the language of instruction in most post-secondary institutions. In Morocco, however, the government has established 2 functions: a modern that uses French in instruction and an original based on Koranic education.

Egypt's public schools teach in Arabic or English, while the private sector teaches in Arabic, English, French, and German. Although Arabic is taught in all schools in Lebanon, the school system uses French or English (or both) as the primary language. In Syria, on the other hand, Arabic is the primary language, with English and French as secondary.

Within the EU-28, there is a considerable difference in unemployment rates by education level: among people aged 25-64 having completed at most lower secondary education the rate was 13.9% in 2017, more than three times the rate (4.2%) for tertiary education graduates (***see Figure 9***). Among the ENP-South countries of the Mediterranean region, the situation was a bit reversed with the exception of Israel where the unemployment rate for people with a tertiary level of education was higher than for persons having completed at most lower secondary education[18].

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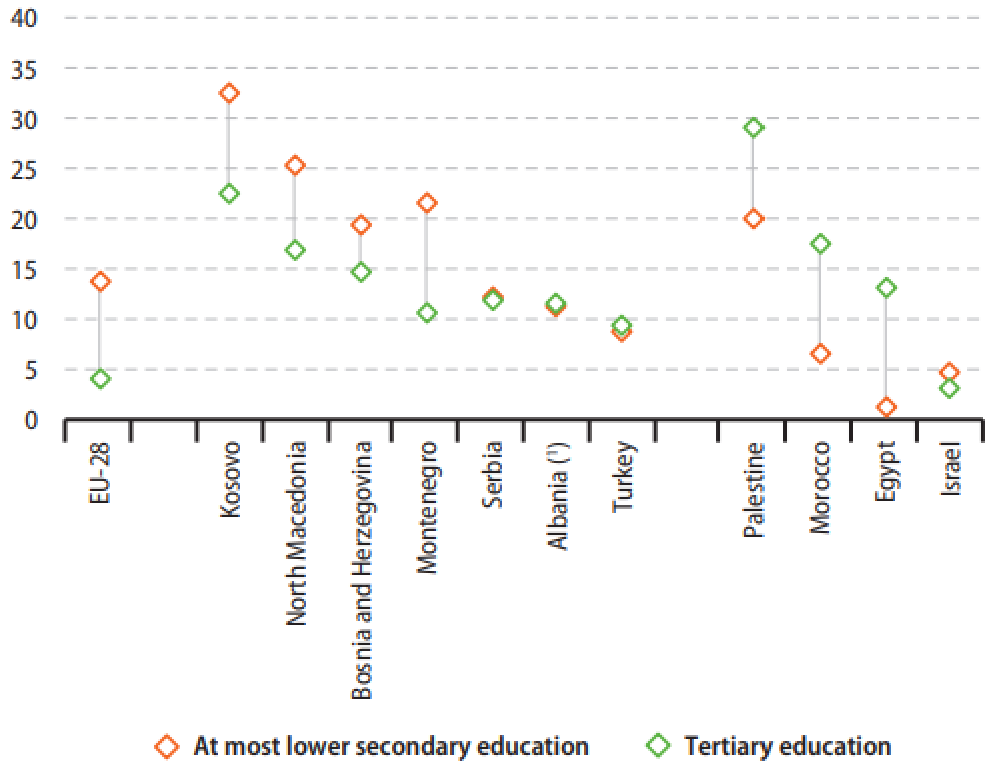
[16] **EU-28**: Belgium, Bulgaria, Czech Republic, Denmark, Germany, Estonia, Ireland, Greece, Spain, France, Croatia, Italy, Cyprus, Latvia, Lithuania, Luxembourg, Hungary, Malta, Netherlands, Austria, Poland, Portugal, Romania, Slovenia, Slovakia, Finland, Sweden, United Kingdom.

[17] **European Neighbourhood Policy** (ENP). South ENP countries: Algeria, Egypt, Israel, Jordan, Lebanon, Libya, Morocco, Palestine, Syria and Tunisia.

[18] **Labour force statistics in Enlargement and ENP-South countries** (2019 Edition). (EUROSTAT).



Note: the international standard classification of education (ISCED) is an instrument for compiling and analysing education statistics. Data by levels of education/educational attainment are classified according to ISCED 2011:

- *ISCED 0: Early childhood education*
- *ISCED 1: Primary education*
- *ISCED 2: Lower secondary education*
- *ISCED 3: Upper secondary education*
- *ISCED 4: Post-secondary non-tertiary education*
- *ISCED 5: Short-cycle tertiary education*
- *ISCED 6: Bachelor's or equivalent level*
- *ISCED 7: Master's or equivalent level*
- *ISCED 8: Doctoral or equivalent level*

Note: ranked on overall unemployment rate for persons aged 25-74 years. Algeria, Jordan, Lebanon and Tunisia: not available.

(¹) Estimate.

Figure 17*: Unemployment* rates *(persons aged 25-64 years), by education level, 2017 (% of active population) (EUROSTAT).*

A variety of European Union tools have been implemented into the education system for European nations in the Mediterranean basin, which, among other things, boost the Lifelong Learning process and have typically supported national changes in these countries' education and training processes. These tools are part of the European Union's long-term strategic goals for education and training, which include making Lifelong Learning a reality, improving education and training quality and efficiency, promoting equity, social cohesion, and active citizenship, and enhancing creativity and innovation at all levels of education and training. One of the biggest aims is to give greater access to learning and employment opportunities within European countries. Besides, the sector of education has been and always will be one of the European Union's priorities, especially with regard to the integration of young people into the labor market through the acquisition of their skills. The framework is based on the lifelong learning approach. It therefore addresses outcomes from early childhood to adult vocational and higher education, and is designed to cover learning in all contexts: formal, non-formal and informal. The framework is implemented through a variety of tools and instruments, including[19]:

- Working Groups, composed of experts nominated by Member States and key stakeholders
- Peer Learning Activities (PLAs), hosted by a Member State to showcase existing good practice at the national level or to explore a particular issue with other Member States
- Peer Reviews involve a group of Member States providing guidance to another Member State on a specific national challenge
- Peer counselling brings together experienced peers from a small number of national administrations to provide advice (at the request of a Member State) on designing or implementing a policy as a response to a specific national challenge
- The annual Education and Training Monitor reports on Member States' progress towards achieving the ET 2020 objectives and benchmarks. This analysis feeds into the evaluation of broader socio-economic progress by Member States within the framework of the European Semester
- Common reference tools and approaches have been produced as a result of work carried out by the Working Groups or as part of mutual learning activities
- Consultation and cooperation activities with stakeholders, including civil society and business and social partner organisations, such as the European Education Summit and the Education, Training and Youth Forum
- Funding for policy support activities and innovative projects through the Erasmus+ programme

Every nation in the Mediterranean region has a Ministry responsible for education. Other departments are often placed under the same ministry, for example in Greece it is the Ministry of Education and Religious Affairs and in Malta the Ministry of Education and Employment. Sometimes sport is part of the education ministry such as the case of Cyprus with the Ministry of Education, Culture, Sport and Youth. More specifically, the key structure of the educational systems in the cross-border area of the project, as

[19] **EACEA** (2020). European policy cooperation (ET 2020 framework).

described more detailed in the previous activity, will be briefly described in the following pages.

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. Education 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.

Italy invests well below the EU average in education, particularly in higher education. The share of teachers satisfied with their jobs is among the highest in the EU, but only a small share believes that theirs is a valued profession. Compulsory work-based learning in vocational education and training could help provide more structured training for apprentices and ease the transition from education to work. The level of tertiary educational attainment is low, and the transition from education to work remains difficult, even for highly qualified people.

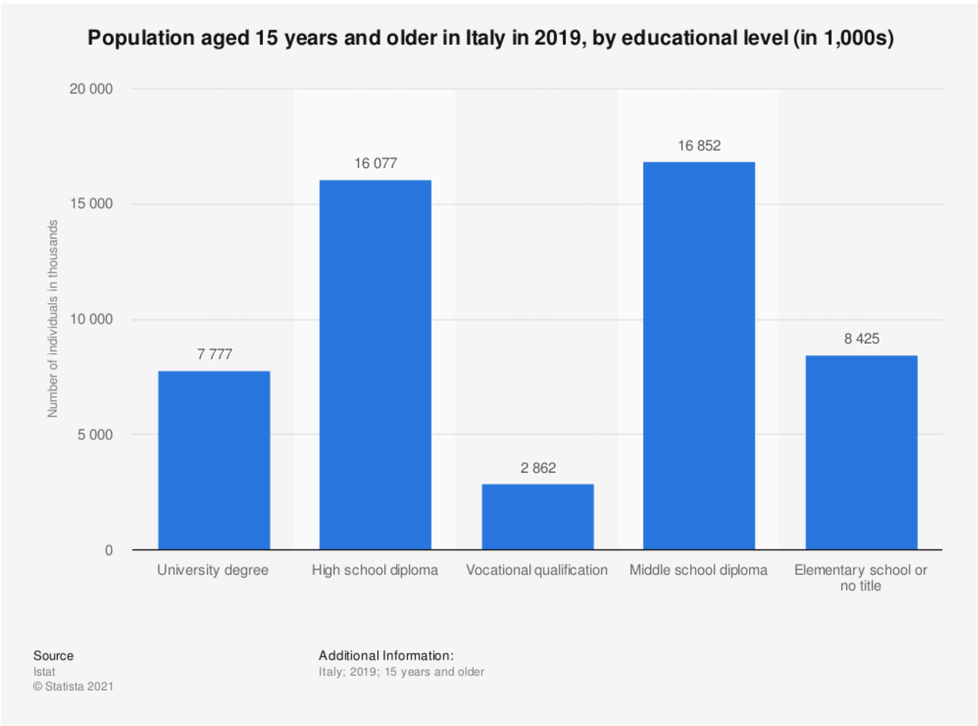


***Figure 18**: Population aged 15 years and older in Italy.*

In 2005 **Malta**'s government reformed the education system again and created autonomous regional colleges consisting of primary and secondary schools and junior colleges. Schools are divided into three categories: state schools, church schools and independent schools. Also, there are four special needs resource centers in Malta. These have specialist teachers as well as equipment and other resources for children with learning difficulties. The schools also help with the integration of children of all ages with special needs into mainstream schooling. At post compulsory level (MQF Levels 1 to 6) the main state institutions which provide Vocational Educational Training (VET) are the Malta College of Arts, Science and Technology (MCAST) and the Institute of Tourism Studies (ITS).

One of the main characteristics of the administration of the education system in **Spain** is the decentralisation: educational competences are shared between the General State Administration (Ministry of Education and Vocational Training) and the authorities of the autonomous communities (Departments for Education):

- The central education administration executes the general guidelines of the Government on education policy and regulates the basic elements or aspects of the system.
- Regional education authorities develop the State regulations and have executive and administrative competences for managing the education system in their own territory.

The Departament d'Ensenyament (Regional Ministry of Education) is the administrative body of the Government of Catalonia in education matters and is responsible for: the proposal and implementation of general non-university educational policy, training and recruiting trainers, and the management of training centers. The Regional Ministry of Education of the Government of Catalonia sets up training programmed for IVET students and supports training centers in close co-operation with local companies and professional associations. The main areas of activity in high education are divided into four main fields: formal education, which covers compulsory and higher education; occupational training, which includes professional training and lifelong learning; non-formal education, which includes various specific types of education that complement formal education and occupational training; and online training, a new tool for delivering training based on new information and communication technologies.

The Ministry of Education and Higher Education leads the education sector in **Palestine** in its capacity as the official body responsible for running, organizing and developing the educational sector (direct management or through supervision) with all its sectors (pre-school education, school education (1-12 grades), technical and vocational education, non-formal education and higher education). It leads the national effort of strategic planning of the education sector through the planning and budget group.

Overall, in Palestine, poor labour market outcomes for young people combined with a high level of early school leaving have led to a large proportion of young people who are not in employment, education or training (NEETs).

The provision of education is the responsibility of the Ministry of Education & Higher Education in **Lebanon** which governs the education sector. The educational system consists of primary and secondary education (compulsory education for children) and higher / tertiary education. The system is centralized and this regulation is not direct. The regional education bureaus in the governorates are in charge of monitoring public schools. The regional education bureau acts as a link between the public school and the ministry's education directorates. Although private schools have their own organisation, they are nonetheless subject to the Ministry's control.

4 Sports sector

Sports have a long history in the Mediterranean region, dating back to ancient times. Sports were certainly popular in ancient Egypt, and according to legend, the Pharaohs utilized their archery skills as a symbol of strength and fitness to dominate.

Sports are part of every culture past and present, but each culture has its own definition of sports (Carl Diem). No one can say when and where sports actually began. Ball games were played by ancient peoples as diverse as the Chinese and the Aztecs, according to archaeological evidence. Ball games would be sports in the strictest sense if they were competitions rather than non-competitive ritual acts. The evidence supplied by Greek and Roman antiquity, which demonstrates that ball games were for the most part fun hobbies like those suggested for health by the Greek physician Galen in the 2nd century CE, shows that they cannot simply be presumed to be contests.

In ancient Greece sports had a cultural significance unequaled anywhere else before the rise of modern sports. Secular and religious motives mingle in history's first extensive "sports report," found in Book XXIII of Homer's Iliad in the form of funeral games for the dead Patroclus. In general, Greek culture included both cultic sports, such as the Olympic Games honoring Zeus and secular contests. The most famous association of sports and religion was certainly the Olympic Games, which Greek tradition dates from 776 BCE. In the course of time, the earth goddess Gaea, originally worshiped at Olympia, was supplanted in importance by the sky god Zeus, in whose honor priestly officials conducted quadrennial athletic contests. Sacred games also were held at Delphi (in honor of Apollo), Corinth, and Nemea. Since the Greeks were devoted to secular sports as well as to sacred games, no polis, or city-state, was considered a proper community if it lacked a gymnasium where naked male athletes trained and competed.

Sports in ancient Rome, on the other hand, were quite selectively enthusiastic about Greek athletic contests, despite the fact that chariot races were among the most popular sports spectacles of the Roman and Byzantine eras, as they had been in Greek times. The Romans preferred boxing, wrestling, and throwing the javelin to running footraces and throwing the discus, emphasizing physical exercises for military readiness, an important motive in all ancient civilizations. The chariot races in Rome's Circus Maximus drew a large crowd - they were watched by as many as 250.000 spectators, five times the number that crowded into the Colosseum to enjoy gladiatorial combat. The gladiatorial games, however, like the Greek games before them, had a powerful religious dimension.

Sports had become completely secular by the time of the Renaissance. Behind the epoch-defining transition from Renaissance to modern sports lay the scientific breakthroughs that powered the Industrial Revolution. New games, such as basketball, volleyball, and team handball, were purposefully designed to be as precise as new products for the market. As early as the late 17th century, quantification became an important aspect of sports, and the cultural basis was created for the concept of the sports record[20].

In the following sections of the present report, the analysis at the national and regional level, drawing from the regional reports which were developed by the project partners, will provide a summary of the key themes and trends related to the sports industry in each region/country. National strategies for sport as well as the economic system and legal framework, the main supporting mechanisms and the role of sports in the educational system are some of the main topics which have been described in detailed in the partners regional reports.

4.1 Economic system and labour market

The sports industry in **Greece** is a very small sector within the Greek economy, contributing about 1.7 % to the country’s GPD. Although the sports industry is very small, Greece has a long and important history in the world of sport, as mentioned before, being the home of the ancient Olympic Games first recorded in 776 BC 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.

[20] https://www.britannica.com/sports/sports

In general, 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 the economic importance of sport which, especially after the 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, sport 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 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).

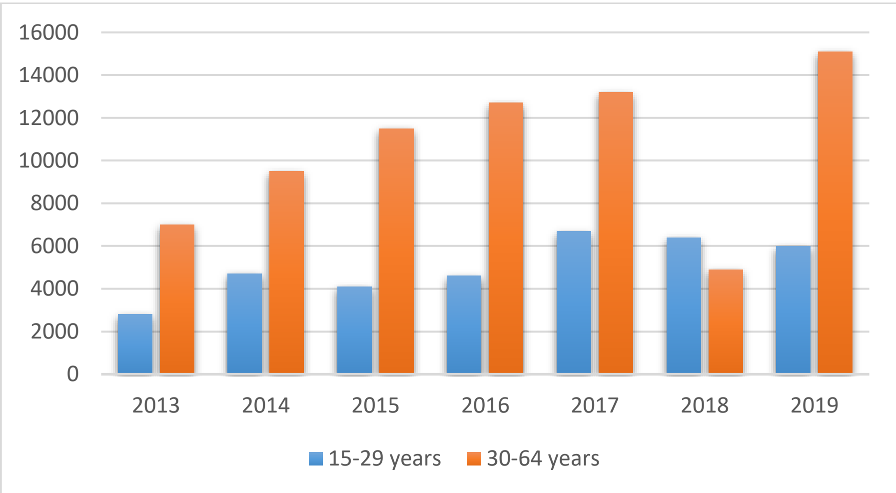


***Figure 19**: Employment in the sports industry by age (Eurostat).*

The Hellenic Ministry of Culture and Sports holds the responsible public body for the administration and finance of sports, the General Secretariat of Sports (GGA). 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.

When it comes to **Malta**, the share of sport-related value added is 1.75% for the narrow definition and 2.24% for the broad definition of sport. This is above the EU average (1.13% narrow definition and 1.76% broad definition). The highest sport-related value added is in the sector "Recreational, cultural and sporting services", followed by "Education services" second, and "Retail trade services" third[21]. Sport has an important role to play in the economy of the state. A report on the economic impact of sport in Malta states that in 2013 sport contributed €80.5 million to the national gross domestic product (GDP), or 1.1% of the total GDP, when taken from a production approach, and €136.6 million, or 1.8%, when taken from an expenditure approach. The contribution to the national GDP is in line with other nations, such as the UK (1.5%) and the USA (2%), however whereas in most nations the largest contribution to the GDP is derived from sports organisations (events), retail and government investment, in Malta it comes from sports tourism. In fact, sports tourism contributes €58.7 million to the country's GDP, with 81% of this deriving solely from scuba diving. In hard numbers, more than 110,000 tourists (7.2% of the whole number of tourists for 2013) visited Malta for sports purposes, with the total expenditure of such tourists amounting to €124.8 million[22].

The total number of people working in the Sport and Physical Activity Sector in Malta in 2018 was 1.800. This represents a growth rate of 181% since 2011[23]. In the second quarter of 2020, 801.700 people aged over 15 in the EU were employed in the sports and fitness sector, representing 0.4% of total employment. Regarding the percentage of people employed in the Sport Malta had a very low employment percentage comparing with other EU countries and with the EU average (0,60). More than half the people employed in Sport organisations in Malta have a low educational level. People with full-time contracts in sports organisations have increased since 2016[24]. Sports in Malta is funded primarily by the state in various modes and not always in direct funding:

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[21] https://ec.europa.eu/assets/eac/sport/library/studies/study-contribution-spors-economic-growth-final-rpt.pdf , p. 134

[22] https://meae.gov.mt/en/Public_Consultations/MEDE/Documents/SPORTS%20CALENDAR%20OUTPUT%20(1).pdf , p.25.

[23] https://www.essa-sport.eu/wp-content/uploads/2020/01/ESSA_Sport_National_Report_Malta.pdf, p. 20.

[24] https://meae.gov.mt/en/Public_Consultations/MEDE/Documents/SPORTS%20CALENDAR%20OUTPUT%20(1).pdf p.19

- Land donation to clubs and associations for sports activities
- Facility Investment schemes
- State sports funding
- Private sponsorships for the different associations and clubs
- Educational funding both national and internationally.
- SportMalta initiatives
- Association's source of funding from international bodies (e.g., UEFA, FIFA, etc.)

In **Italy**, according to CONI estimates, sport is worth 1.7% of the country's GDP, therefore 30 billion. This figure doubles to 60 billion if we also consider the co-related industry. Only Italian football, as highlighted by the 2018 FIGC financial report, generates a general turnover of 4.7 billion, corresponding approximately to the 12% of world football's GDP. According the "CONI-FSN-DSA Monitoring 2017" published by CONI Services Study Center in Italy there are 4 million and 703.000 car d-carrying athletes, 70.000 sport association, of which over 63.000 sports clubs, 6.000 "other groups" and well over 1 million operators covering roles and professional charges such as manager, technician, race officer and collaborator in various ways.

By observing the increasing trend of units working in the sport industry in Italy from 2011 to 2017, as reported by Eurostat, we can remark a constant growth of labour force employed in the sector standing on a general increase of approximately 25.000 units (***Figure 11***).

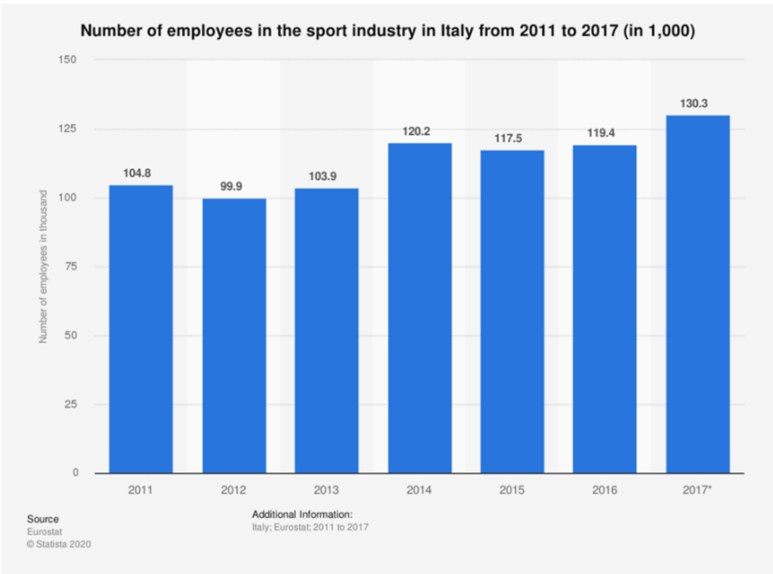
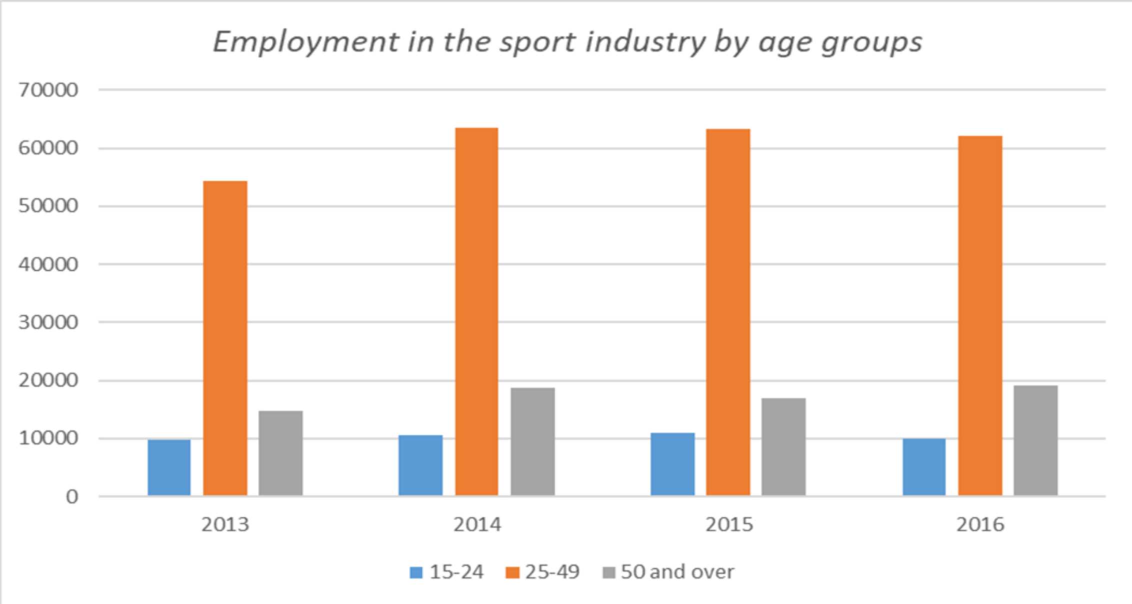


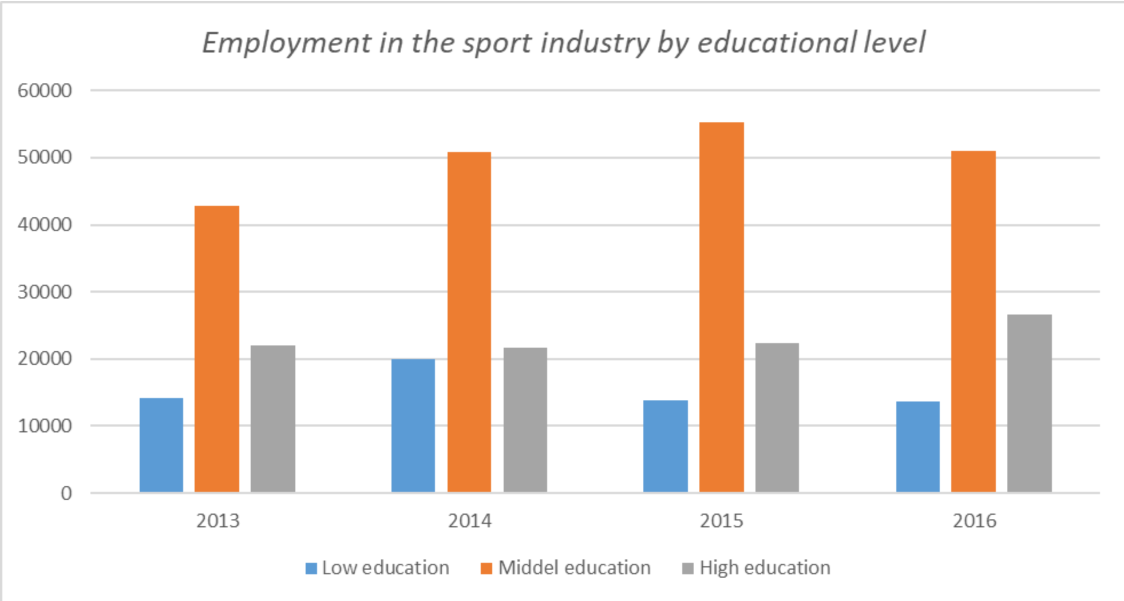
Figure 20: *Employment in the sports industry in Italy: Historical trend (Eurostat).*

Meanwhile, disaggregating the employment trend per age groups we can consider a general alignment with the European average of workforce employed in the Italian sector (***Figure 12 & 13***).



Years	2013	2014	2015	2016
15-24	9731	10471	11031	10021
25-49	54389	63462	63291	62150
50 and over	14824	18618	16960	19060

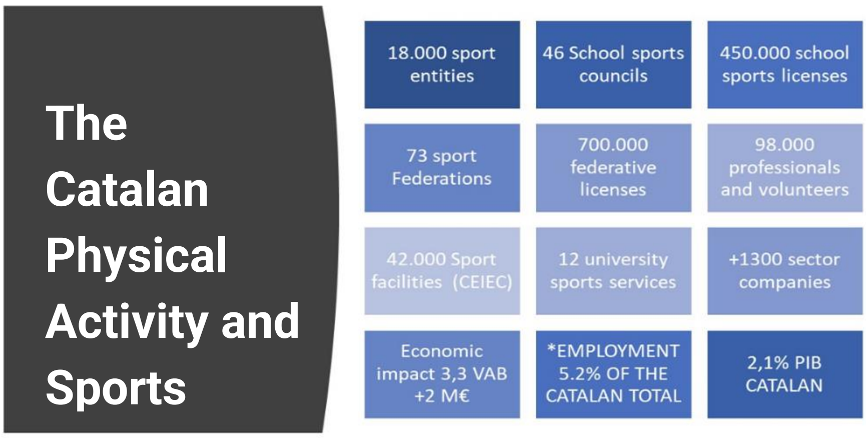
Figure 21: *Employment in the sports industry in Italy by age (Data Eurostat exposed on ESSA report).*



Years	2013	2014	2015	2016
Low education	14177	20008	13746	13680
Middle education	42753	50814	55208	50947
High education	22014	21729	22329	26603

Figure 22*: Employment in the sports industry in Italy by educational level (Data Eurostat exposed on ESSA report).*

In **Catalonia**, sports account for 2% of the total GDP and employs 31.768.00 people, being the facility sector (gyms, clubs, Facility management), the sport segment with more employment, with 44.34%, followed by the production and sale of sports goods (***Table 4***).



	Nº companies	% companies.	Turnover (millions euros)	% Turnover	Nº workers	% nº workers	CAGR turnover. 2017-2020
Sports consulting and training	58	4,22%	85.752 €	1,30%	911	2,87%	-7%
Event organisatiom	79	5,75%	114.330 €	1,74%	655	2,06%	4%
Media	18	1,31%	688.099 €	10,45%	1.160	3,65%	17%
Event based services	31	2,25%	50.639 €	0,77%	2.142	6,74%	16%
Competition teams	32	2,33%	947.268 €	14,38%	2.700	8,50%	14%
Events	218	15,85%	1.886.088 €	28,64%	7.568	23,82%	44,24%
Facility construction	33	2,40%	508.326 €	7,72%	4064	12,79%	-45%
facility Equipment	33	2,40%	124.935 €	1,90%	485	1,53%	-10%
Facility management	586	42,62%	665.601 €	10,11%	9.538	30,02%	69%
Facilities	652	47,42%	1.298.862 €	19,72%	14.087	44,34%	14,04%
Health and Nutrition	18	1,31%	95.200 €	1,45%	1.039	3,27%	-33%
Tools and instruments	118	8,58%	344.651 €	5,23%	1.502	4,73%	10%
Clothes and accessories	81	5,89%	1.197.697 €	18,18%	5.160	16,24%	6%
Health, wellness and performance	209	15,20%	1.726.029 €	26,20%	2.063	6,49%	5184%
Active sports tourism	79	5,75%	38.120 €	0,58%	349	1,10%	75%
Sports goods and services	505	36,73%	3.401.697 €	51,65%	10.112,51	31,83%	5241,21%
TOTAL	1375	100%	6.586.647 €	100%	31.768	100%	

***Table 4**: Economic system of the sports sector in Spain.*

According to the Catalan Sports Council, there are around 18.000 sports clubs affiliated to one or more sports federations. Catalonia has 73 sports federations and most Catalan sports clubs are affiliated to one of them, having in total 700.000 sports practitioners. Catalonia has ten (10) high performance centers specialised in different sports.

Sports in **Palestine** falls under the category of Arts, Entertainment and Recreation and contributed to 0.3% to the GDP in 2020. Palestine has a history in sports - especially football. The Ministry of Finance distributes the budget, which it gets mostly as donations/funds to the Higher Council of Sports and youth and the Olympic Committee. The Olympic Committee is responsible to distribute the budget for its federations, while the Higher Council of Sports and youth distribute it to the youth centers and clubs. The National Youth Strategy 2017–2022, launched by the Higher Council for Youth and Sport in 2016, identifies economic empowerment, poverty alleviation, and education and training as strategic areas of intervention. However, this strategy has still not been endorsed by the government. The Cooperative Sector Strategy (February 2017) underlines the important role of cooperatives in providing livelihoods for people and communities in Palestine, as well as the need to invest in cooperative education and literacy for young people and to explore the potential of the technology industry to increase employment opportunities.

Sports sector in **Lebanon** is managed and controlled by the Ministry of Youth and Sports. The budget for the Ministry of Youth and Sports is only $2-3 million, according to the 2010 President of the Youth and Sports Parliamentary Committee, Deputy Simon Abi Ramia. The sector is tiny, with most investments being from the private sector with no coordination or government support whatsoever. Political and sectoral lobbies either initiate the funding for their own purposes or jump in as soon as they see an opportunity.

There are 34 total sports federations in Lebanon (***Table 5***).

Lebanese National Sports Federations				
Rugby	Taekwondo	Table Tennis	Swimming	Rowing
Ice Hockey	Wushu	Kick-Boxing	Weight Lifting	Fencing
Volleyball	Canoë Kayak	Squash	Boxing	Chess
Badminton	Muay-Thai	Gymnastics	Wrestling	Athletics
Sailing	Dancesport	Shooting	Tennis	Paralympics
Cycling	Karate	Football	Skiing	Basketball
Archery	Handball	Water Skiing	Equestrian	

Table 5*: Lebanese National Sports Federations.*

4.2 Sports in education system

Sport is a major issue in the globalized environment with economic, social and cultural implications for the progress, development and prosperity of a country. Both in the form of physical education and with the dimension of high sport/championship, sports are at the center not only of sports policies, but also of those related to the policies of education, society and health for a country.

At international level, the International Charter of Physical Education and Sports (UNESCO, 1978) is applied, which enshrines the citizens' right to sport. According to the International Charter of Physical Education and Sports, Physical Activity and Sport is a rights-based reference that orients and supports policy and decision-making in sports. It promotes inclusive access to sport by all without any form of discrimination. Furthermore, it sets ethical and quality standards for all actors designing, implementing and evaluating sport programmes and policies. This unique text is the expression of a common vision by all stakeholders whether they are professional or amateur athletes, referees, public authorities, law enforcement, sports organizations, betting operators, owners of sports-related rights, the media, non-governmental organizations, administrators, educators, families, the medical profession or other stakeholders[25].

Article 1 of the International Charter of Physical Education and Sports declares that "Physical Education and Sports are fundamental rights for all", while Article 2 explicitly states that: "Physical Education and Sport are a fundamental element of education within the education system". It also proposes the need for sports especially for developmental ages, as sport is not limited to physical well-being and health, but is an excellent way for comprehensive, balanced and harmonious development of the personality of young people. The provisions of the Statute Charter point out the equal educational role of Physical Education in school and its special contribution to the general education and cultivation of the human being. UNESCO, supporting the holistic development of the Physical Education and Sports, calls on the Member States – Mediterranean region included – to develop strategies aimed at making Physical Education a strong pillar of educational programs (UNESCO, 2004).

However, while the UN member states fully adopt the UNESCO International Charter on Physical Education and Sport and at the same time the European Union declarations on Physical Education and Sports are numerous and seem self-evident as everyone agrees, the violation of these conditions is incredibly widespread for some members of the Mediterranean region (e.g., Greece).

There is also another strategy developed by EOSE (European Observatoire of Sport and Employment) referring at the Lifelong Learning education in sports. EOSE developed a "7 Step Model" which provides a framework for the development of a strategic approach to ensure that vocational education, training and qualifications exist to support the development of the growing sport workforce. The model aims to bring the education and employment stakeholders together in a collaborative approach to ensure that sport education provision is fit for purpose and in line with the needs of the labour market[26]. The first five steps of the model are about understanding the labour market and competences required in order to find a job in the sports industry, the final two steps are about developing appropriate education strategies and courses to meet the demands of the sector which have been defined in Steps 1 to 5.

In national level, Physical Education is a subject included in the schools' lessons and program. Project Partners have provided in their regional reports a detailed description of their national educational systems concerning the involvement of the Physical

[25] https://en.unesco.org/themes/sport-and-anti-doping/sport-charter

[26] https://eose.org/approach/7-step-model/

Education and sports in schools. Based on the reports, Physical Education is included in the lessons of the school program in primary and secondary level of education.

In Greece, Palestine, Lebanon and Italy, the Ministries responsible for Education are also responsible for the implementation of the policy for the Physical Education in all levels of Education. For the Greece example, 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 have been and is considered an extracurricular activity and is given secondary priority in Greek schools. Respectively for Palestine, the mindset towards sports education is unfortunately very low, in terms of school and university, in comparison with Italy, where in the secondary schools, sports activities are well structured and are supported through the special funding from the Ministry of Education and the Regional School Offices for the widening of educational offerings, allowing students to train and prepare for competitions in the various sports selected.

On the other hand, in Malta, the KMS (Malta Sports Council) established a very positive relationship with the Education Division and schools and has embarked on various physical activity and sports programmes to encourage participation by school children. The Community Sports Programme (CSP) and the After School Sports Programme started as a pilot project in a number of schools and planned to extended to other schools in the future[27].

5 Benchmarking Analysis

5.1 Introduction

In the process of assessing the capacity of the regions for the skills development in the sports sector as part of the Skills4Sports project, the first step is to assess the current overall industry offering.

In line with the overall objective, the goal of this activity is to extract benchmarks from the initial conclusions of the partners' regions as well as supporting mechanisms and initiatives presented in the A3.2.1. - Regional Analysis and Report. The goal is also to develop a set of tools that can be used to measure readiness and performance of the sports sector of the cross-border area.

[27] https://education.gov.mt/en/resources/Documents/Policy%20Documents/reshaping_sports.pdf, p.16

The purpose of the tool is to measure the readiness and performance of local/regional/national authorities and other stakeholders in terms of initiatives and supporting mechanisms for the skills development in the sports sector, but also to identify weaknesses and areas for improvement and guide their future steps to be included in the Skills Gap Analysis Report for the cross-border area. This report provides a self-assessment questionnaire and other tools that will lead public authorities and other key stakeholders in their improvement efforts.

To realize the above goal, TREK Development S.A. has provided the following set of tools:

1. Matrix to measure readiness and performance
2. Survey questionnaire that can be used among a broad range of stakeholders

This survey was initially implemented among the 8 partners. The results and analysis are being described in the following pages of the report.

5.2 Assessment based on the readiness and performance

Stakeholders can also use the following matrix in the future stages of the project, in order to assess their readiness and performance. Each participant can assess its level of readiness and performance and mark its organization on the matrix (***Figure 23***).

There are two axes in the matrix:

1. **Readiness** (measuring the competencies)

"Readiness" is used to measure what is the state of the organisation in order to implement the project's objective.

2. **Performance** (measuring the performance)

"Performance" is then used to measure the grade at which initiatives have been taken to reach the goal.

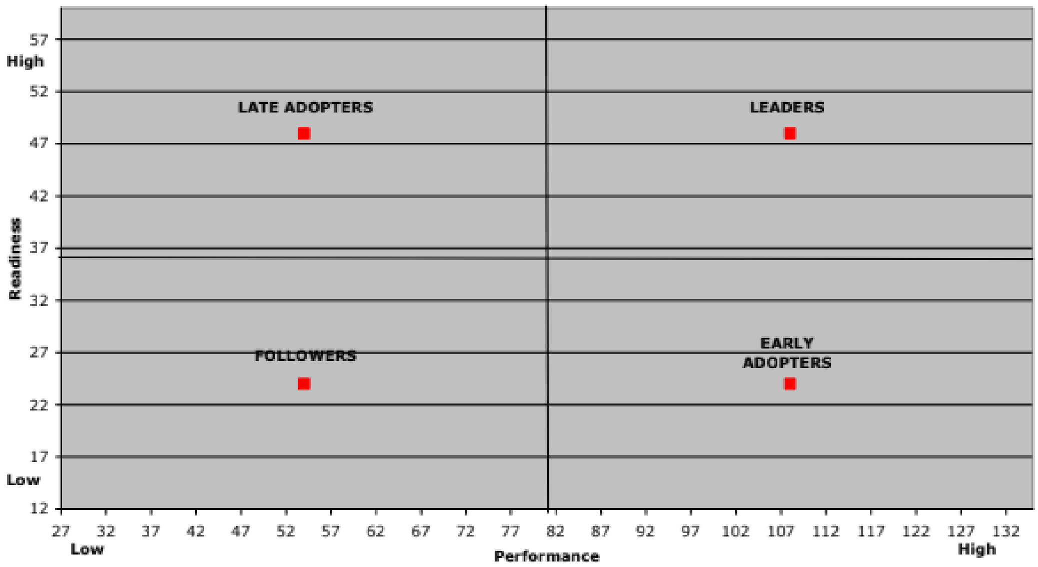


Figure 23: *Benchmarking matrix.*

5.3 Sample questionnaire for the online survey (partners)

This online survey is a part of the A3.2.2. - Synthesis and Cross-border Analysis. Results from the survey will help TREK Development S.A., the partner leading this activity, to extract benchmarks from the supporting mechanisms and initiatives and develop the tool to measure readiness and performance in the skills development of the sports sector for the cross-border area of Skills4Sports. Each partner is kindly asked to fill in the questionnaire. Upon receiving the results, TREK Development S.A. will process and analyse the results in a single report.

5.4 Conclusions

As mentioned in the introduction, the purpose of the tool is to measure the readiness and performance of local/regional/national authorities and other stakeholders in terms of Skills4Sports objectives, but also to identify weaknesses and areas for improvement and guide their future steps to be included in the Skills Gap Analysis Report for the cross-border area of the project. This report provides tools that will lead public authorities and key stakeholders in their improvement efforts.

The above set of tools and indicators is by no means an exhaustive list. Since the area of the skills development in the sports sector is rather new and not yet explored, this is an initial set that could be further tested and upgraded by each partner and stakeholders in their own regions and countries.

5.5 *Analysis of the results*

For the purposes of the Benchmark Analysis, TREK Development S.A. has developed an online survey that have served in generating initial assessment about a level of the skills development in the sports sector for the partner regions and countries, as well as main challenges, needs and objectives for the development of a strategic alliance.

A total of 8 partners have filled in the questionnaire for their respected regions.

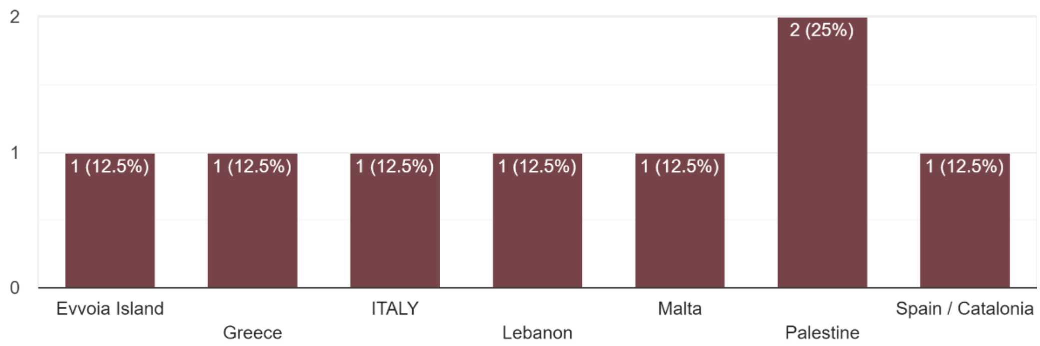
Link: https://docs.google.com/forms/d/e/1FAIpQLSfdUFEWmlbvtobk5w-rYCG1MBJf262Z-8lNH83Vq12o8gqxUQ/viewform?usp=sf_link

Following the analysis of the results.

- **<u>General Information</u>**

Country / Region

8 responses



Type of organisation

8 responses

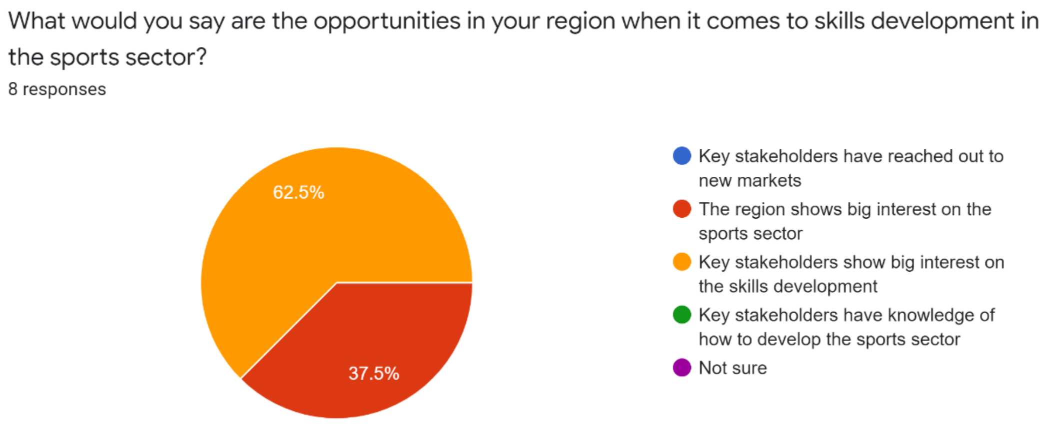
○ **Situation Analysis**

What would you say are the strengths of your region when it comes to developing and promoting the skills development in the sports sector?
8 responses

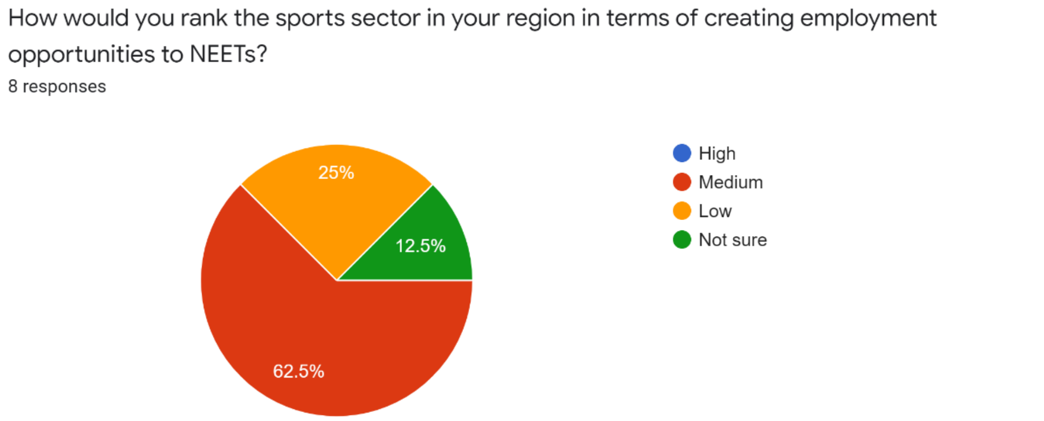
50% of the responders answered that the biggest strenght of their region when it comes to developing and promoting the skills development in the sports sector is that the region is well-known for the sports sector activities. A 12.5% responded that the sports sector in the region is well-developed.

What would you say are the weaknesses?
8 responses

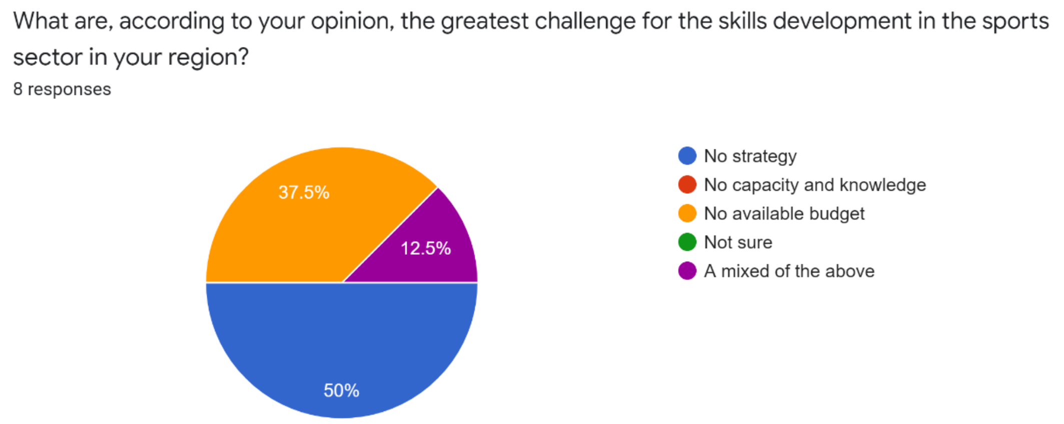
When it comes to the weaknesses, 37.5% responded that they lack of financial resources, while 12.5% said that in localities and on a local level sports is administered on a volunteer basis and is needed to move forward more on professional roles and opportunities.



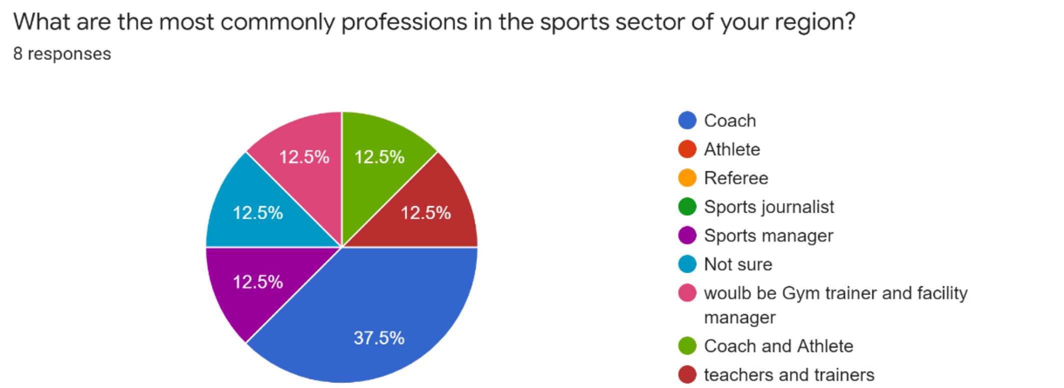
The majority of the responders answered that key stakeholders show big interest on the skills development, while a 37.5% respond that the region shows big interest on the sports sector.



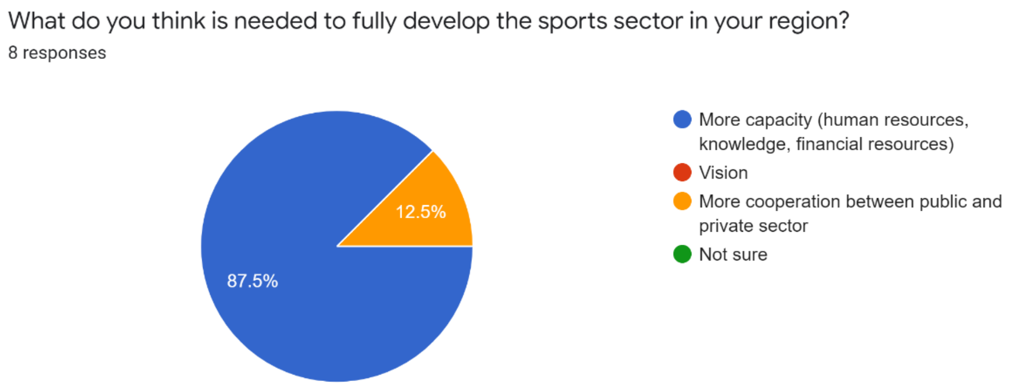
62.5% of the responders ranked the sports sector in their regions as medium level. 25% respond low, while the 12.5% are not sure.



When it comes to greatest challenge for the skills development in the sports sector, half of the participants respond that there is no strategy. 37.5% respond that there is no available budget and 12.5% said that is a combination of all the above.

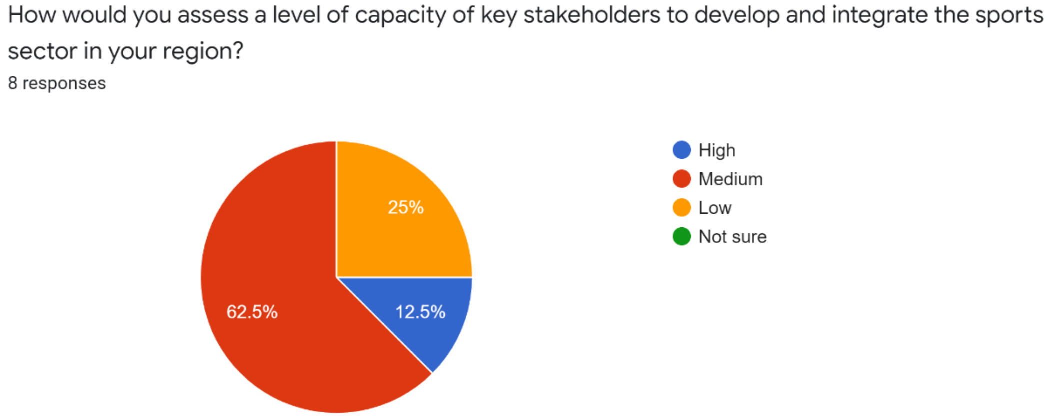


37.5% of the responders said that the most commonly professions in the sports sector are the profession of coach. Other professions include sports manager, trainer, athlete and teacher.



In the question "what do you think is needed to fully develop the sports sector in your region", almost all responders answered that more capacity (human resources, knowledge, financial resources) is mostly needed. 12.5% respond that more cooperation between public and private sector is needed.

- **Capacity Building**



The majority of the responders ranked the capacity of the stakeholders to develop and integrate the sports sector as medium. 25% ranked it as low, while 12.5% gave a high rank.

What do you think is needed in terms of raising capacity of key stakeholders to develop and promote the sports sector?
8 responses

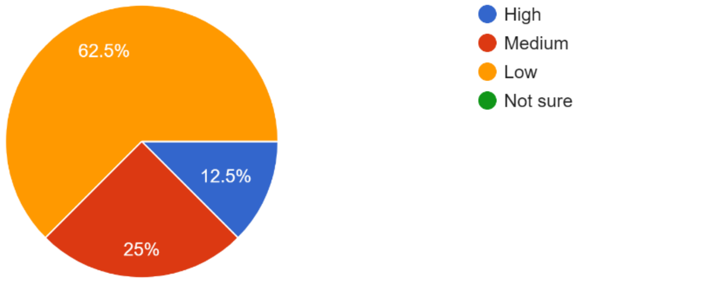
Half of the responders answered that training on how to use the resources dedicated to the sports sector is needed in terms of raising capacity of key stakeholders in order to develop and promote the sports sector. 25% respond that they need training on how to improve the management.

Who is in your opinion the more equipped to develop or coordinate the sports sector in your region?
8 responses

25% of the responders answered that national authorities, as well as the responsible ministry (25%), are the most equipped to develop or coordinate the sport sector.

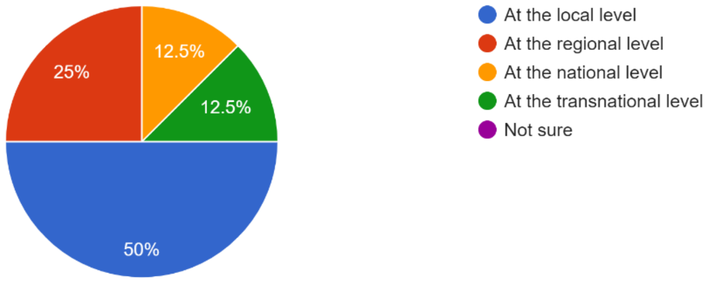
○ Networking and Cooperation

How would you assess a level of cooperation among the key stakeholders in the sports sector and the final beneficiaries?
8 responses

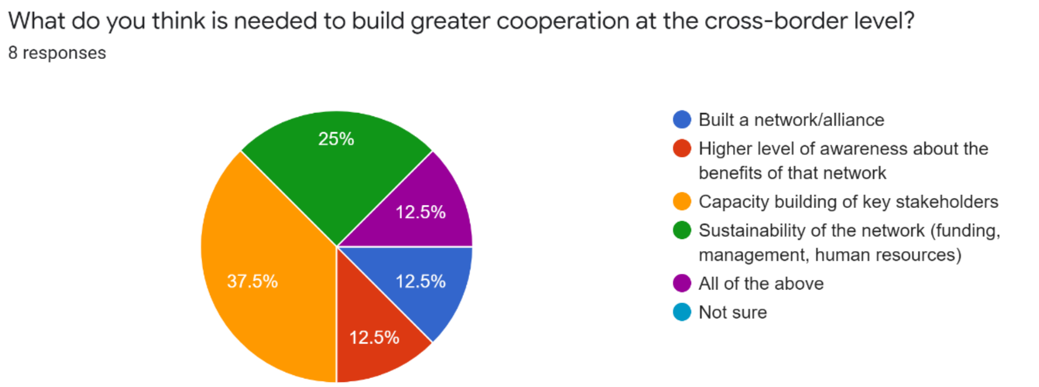


62.5% respond ranked the level of cooperation among key stakeholders as low, while the 25% ranked it as medium. 12.5% ranked it as high.

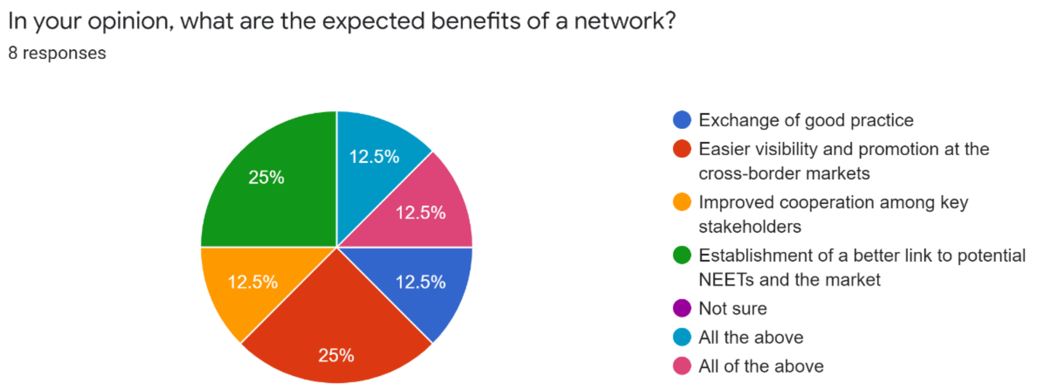
Where do you see the highest level of cooperation?
8 responses



The majority of the responders answered that they see the highest level of cooperation at the local level. 25% answered that they see it at the regional level and 12.5% at national and transnational level.



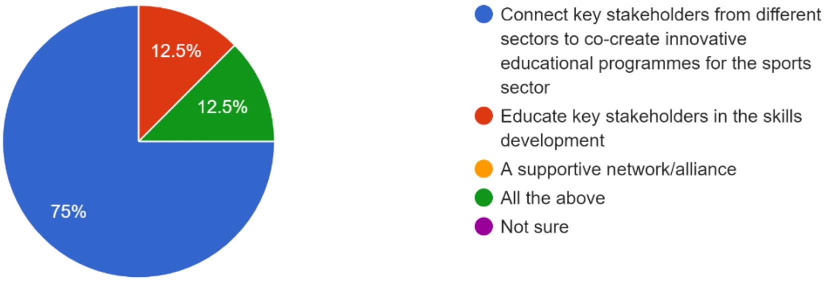
In the question "what do you think is needed to build greater cooperation at the cross-border level", 37.5% of the responders said capacity building of key stakeholders. 25% respond that sustainability of the network (funding, management, human resources) is needed the most.



25% of the responders answered that the expected benefit of a network is the easier visibility and promotion at the cross-border markets, as well as the establishment of a better link to potential NEETs and the market.

- **Marketing Approach**

What would be in your opinion the most effective approach to developing the sports sector?
8 responses



Almost all of the responders believe that the most effective approach to developing the sports sector is to connect key stakeholders from different sectors to co-create innovative educational programmes for the sports sector.

6 Conclusions

Youth unemployment in the Mediterranean region is an urgent and worrying issue, with Mediterranean countries holding one of the highest youth unemployment rates. The proportion of young people not in education, employment or training (NEETs) has increased since the financial crisis, and in many countries youth unemployment rates are higher than unemployment in the older working age population. This is mainly due to the low economic situation that most Mediterranean countries are currently in, with this also having a significant impact on the education sector which is another important factor that leads to youth unemployment, leading to a dysfunctional relationship between education systems and labour markets. Over the last years, unemployment rates in the Mediterranean have risen more rapidly, especially for the sports sector although it has been identified as a growth area offering job creation potential, reflecting this way that the economic crisis that has preceded.

Another critical factor that has been observed to affect the absorption of young people in the labour market, is the mismatch of skills that exist between the real skills that the labour market seeks and the skills that young job seekers are ultimately armed with. Prominent economic sectors, such as the sports industry, face challenges in finding the right skills for their growing needs when recruiting employees. In this context, the transition of young people from education to the labour market is inefficient and therefore requires improvement. Although the sports industry is a sector which is growing fast over the years and therefore represents a key asset for the economy in international level, as well as in terms of job opportunities, a lot of parameters have affected negatively the sector in the Mediterranean region (pandemic, economic and political crisis, etc.) and widespread conditions of job insecurity.

Efforts in the region have been ineffective in preventing high rates of youth unemployment. In the meantime, demographic pressures and immigration patterns predict that unemployment rates will continue to rise in the coming years. Tackling youth unemployment in the region should remain a top policy objective, but the focus should be on programs and policies with proven effectiveness for the sector. More specifically, each country should:

1. Expand the capacities of regional and local stakeholders in order to identify the skills supply and demand (skills mismatch) in the sports sector
2. Establish strategic financial management which hinders sustainable employment for the sector
3. Include systems for monitoring and evaluation in order to ensure accountability of results
4. Improve the transition of young people from education to work environment
5. Improve the relationship between training and employment and the capacity for occupational integration in the sports sector
6. Provide new curricula for vocational training following the skills gap in each country
7. Proceed to a better adaptation of training programs to sports industry labour market demand

Landing one of sports jobs is incredibly difficult, especially if you're an underemployed young professional, or struggling with long term unemployment, or unemployed due to a lack of experience.

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8 Annexes

- ***Annex 1.*** *Questionnaire for online survey*

I. GENERAL INFORMATION

1. Name of the partner
2. Country
3. Type of organisation
   - A regional development agency
   - A local/regional government
   - A non-profit organisation
   - Business agency or a company
   - Research institute
   - Sports federation
   - National sports organisation, public body
   - Other ....

II. SITUATION ANALYSIS

1. What would you say are the strengths of your region when it comes to developing and promoting the skills development in the sports sector?
   - The region is well-known for the sports sector activities
   - The sports sector of the region is well developed
   - Sports sector in the region is well-promoted
   - The region really understands what "skills development" is and is capitalising on it
   - Other (please specify) ______________
   - Not sure
2. What would you say are the weaknesses?
   - Lack of financial resources
   - Lack of understanding the importance of the skills development
   - Lack of policy
   - Low public support – interest form the public authorities
   - Lack of proper information to young people
   - Other (please specify) _____________
   - Not sure
3. What would you say are the opportunities in your region when it comes to skills development in the sports sector?
   - Key stakeholders have reached out to new markets

- The region shows big interest on the sports sector
- The region shows big interest on the skills development
- Key stakeholders have knowledge of how to develop the sports sector
- Other (please specify) ____________
- Not sure

4. How would you rank the sports sector in your region in terms of creating employment opportunities to NEETs?
    - High
    - Medium
    - Low
    - Not sure
5. What are, according to your opinion, the greatest challenge for the skills development in the sports sector in your region?
    - No strategy
    - No capacity and knowledge
    - No available budget
    - Other (Please specify) ____________
    - Not sure
6. What are the most commonly professions in the sports sector of your region?
    - Coach
    - Athlete
    - Referee
    - Sports journalist
    - Sports manager
    - Other (please specify) ____________
    - Not sure
7. What do you think is needed to fully develop the sports sector in your region?
    - More capacity (human resources, knowledge, financial resources)
    - Vision
    - More cooperation between public and private sector
    - Other (please specify) __________
    - Not sure

III. CAPACITY BUILDING

1. How would you assess a level of capacity of key stakeholders to develop and integrate the sports sector in your region?
    - High

- Medium
- Low
- Not sure

2. What do you think is needed in terms of raising capacity of key stakeholders to develop and promote the sports sector?
   - Additional education
   - Training in how to improve the management in the sports sector
   - Training on how to use the resources dedicated to the sports sector
   - Training on the skills development in the sports sector
   - Training in funding
   - Other (please specify) ______________
   - Not sure
3. How would you assess the level of capacity of the key stakeholders to promote the sports sector in your region?
   - High
   - Medium
   - Low
   - Not sure
4. Who is in your opinion the more equipped to develop or coordinate the sports sector in your region?
   - National government
   - National Authorities
   - Ministry responsible for the sports sector
   - Regional Units
   - Municipalities/ Local Authorities
   - Regional Development Agency
   - Sports Businesses Associations experts in sports
   - Other (please specify) _____________
   - Not sure

IV. NETWORKING AND COOPERATION

1. How would you assess a level of cooperation among the key stakeholders in the sports sector and the final beneficiaries?
   - High
   - Medium
   - Low
   - Not sure
2. Where do you see the highest level of cooperation?

- At the local level
- At the regional level
- At the national level
- At the transnational level
- Not sure

3. What do you think is needed to build greater cooperation at the cross-border level?
    - Built a network/alliance
    - Higher level of awareness about the benefits of that network
    - Capacity building of key stakeholders
    - Sustainability of the network (funding, management, human resources)
    - All of the above
    - Other (please specify) __________
    - Not sure
4. In your opinion, what are the expected benefits of a network?
    - Exchange of good practice
    - Easier visibility and promotion at the cross-border markets
    - Improved cooperation among key stakeholders
    - Establishment of a better link to potential NEETs and the market
    - Other (please specify) ___________
    - Not sure

V. MARKETING APPROACH

1. What would be in your opinion the most effective approach to developing the sports sector?
    - Connect key stakeholders form different sectors to co-create innovative educational programmes
    - Educate key stakeholders in the skills development in the sports sector
    - A network/alliance that supports the skills development of the NEETs in the sports sector
    - All the above
    - Other (please specify) ___________
    - Not sure