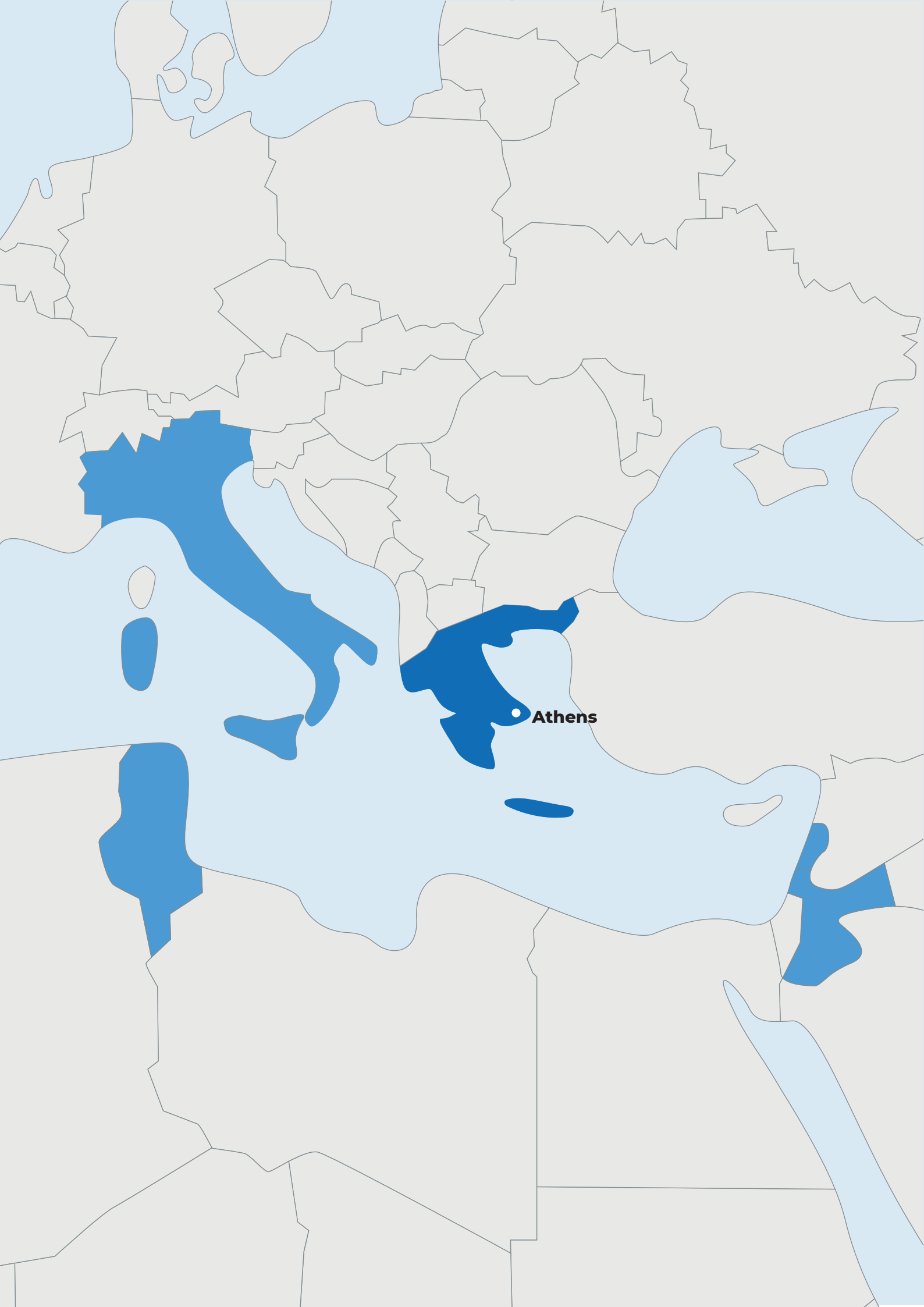


Mediterranean Youth, NEETs and women advancing Skills,
Employment and Awareness in the blue and green economy

Country Territorial Analysis

GREECE





Athens

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Introduction

This research is conducted in the framework of the EU-funded project MYSEA. The project's aim is to increase the employability of young people, women and NEETs in the industries of the agri-food and waste sectors through the development of training oriented to both of them and by strengthening the local governance and sector-skills alliances between economic actors and TVET institutions to align the education curricula with sector's needs.

The purpose of this analysis is to report the situation of young people, women and NEETs, as well as the agri-food sector and the waste management sector in Greece. At the same time, the situation in the field of vocational education and training will be examined as well as the offer of training courses for the other two sectors. Through the analysis of the current situation and policies in the agri-food sector, waste management and vocational training, the research will try to outline the market trends in the first two areas mentioned above as well as their need for staff and skills. The findings of the research concern young people, women and NEETs of Greece with the main purpose of finding jobs in the fields of agri-food and waste management for the stakeholders of the project by promoting entrepreneurship and innovation in the sectors.

In order to have a better analysis of the training requirements, the research is supplemented by the results / answers from the questionnaires that have been sent to the interested parties, to the economic actors, and to the interviews that were done by representatives of TVET institutions.

“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.enicbcmmed.eu”.



PART A Desk Research & Analysis

1 The Agri-food Sector in Greece

The agricultural sector in Greece sustains an important sector of economic activity and employment for Greece, with a contribution of 4.1% to the country's Gross Domestic Product (GDP).

The Greek food – beverages and agriculture sectors have a strong presence in European food markets and a growing presence in US food markets, with a number of companies experiencing rapid export growth. At the same time, employment in the primary and food-beverages industry is remarkably higher in Greece, compared to EU's average.

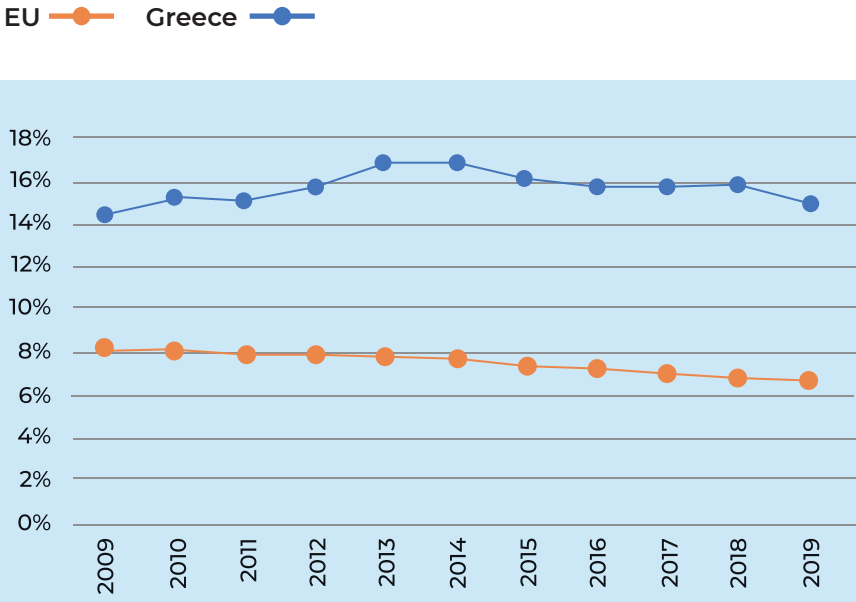


Figure 1. Employment in primary and food-beverages industry.
Source: Eurostat.

In Greece, the economic activities overtime in the primary sector have immense impact in the growth. As primary sector is considered the sector of economy making direct use of natural resources. This includes agriculture, forestry and fishing, mining, and extraction of oil and gas. The largest percentage of the workforce in this field in Greece is occupied in agriculture and a remarkable proportion is employed in agri-food. Dairy products, baked goods and spices are the biggest contributors to the agri-food sector, followed by wine and olive oil. It is worth mentioning that the percentage of people working in the agri-food remained particularly high even when unemployment had peaked in the country due to the recent economic crisis in 2008. Interestingly, despite the recent Covid-19 crisis the agri-food sector was not affected as much as other sectors such as tourism and entertainment. The above sustain an indicator regarding the resilient capacity of primary sector in Greece even when the business cycle changes rapidly and abruptly.

Greece has significant comparative advantages in the field of agri-food, which are based on the diversity of the country and the consequent variety of agricultural products, the favorable conditions of the natural

environment in the lowlands of the country, in quality and the nutritional value of a relatively wide range of agricultural products (olives, grapes, legumes, citrus fruits and others) and in internationally recognized food traditions, advantages that the stakeholders involved in Greek agri-food activities could use to consolidate its position to the world market. Unfortunately, these advantages have not been assessed due to significant and chronic structural weaknesses.

At the same time, the sector presents structural weaknesses, as outlined in the Pissaridis Commission's report on a "Development Plan for the Greek Economy". These include inefficient organization, low integration of new technologies and equipment, small and fragmented farms, low productivity, insufficient vocational training and attraction of youth into its workforce, low level of research and development, high dependence on subsidies, and deficient promotion of Greek brands.

In order to retain its robustness, the Greek agri-food sector should integrate new technologies, adjust its workforce, and support auxiliary policy recommendations towards a sustainable model that will make both short-term and long-term impact feasible. In the context of the Common Agricultural Policy, such policies should target income support, enlargement of holdings, modernization of farms, improvement of human resources, enhancement of collaboration with universities and the research community, increasing the added value of agri-food products, engagement in promotional actions and marketing strategy at the level of regions and products, and connection of the agri-food sector with tourism.

2 Waste management in Greece

During the early stages of industrialization in Greece, the volume of waste was highly controlled and limited and therefore the method of «dilution and dispersion» of waste in marine environments was consciously adopted. Nevertheless, the amount of municipal and industrial waste has risen sharply and this method has been ultimately considered more of an environmental problem and economic damage to the country than a promising waste management method. The situation changed under the Environmental Law and new techniques were adopted to dispose solid, chemical, hazardous and non-hazardous waste, with the most common of them being incineration, pulping, landfills, and recycling.

In Greece the main method of disposing solid waste is that of (sometimes illegal) landfills. These cause groundwater pollution issues, while the self-ignition of waste in these areas is responsible for polluting the atmosphere with toxic gases. In addition, it is estimated that 10% of fire incidents are caused due to landfills. More specifically, concerning waste management by management category for 2018, the »Disposal on or within the ground « constitutes 81.6% of the total, followed by »Recovery other than energy recovery - except landfill « at 10.7%.

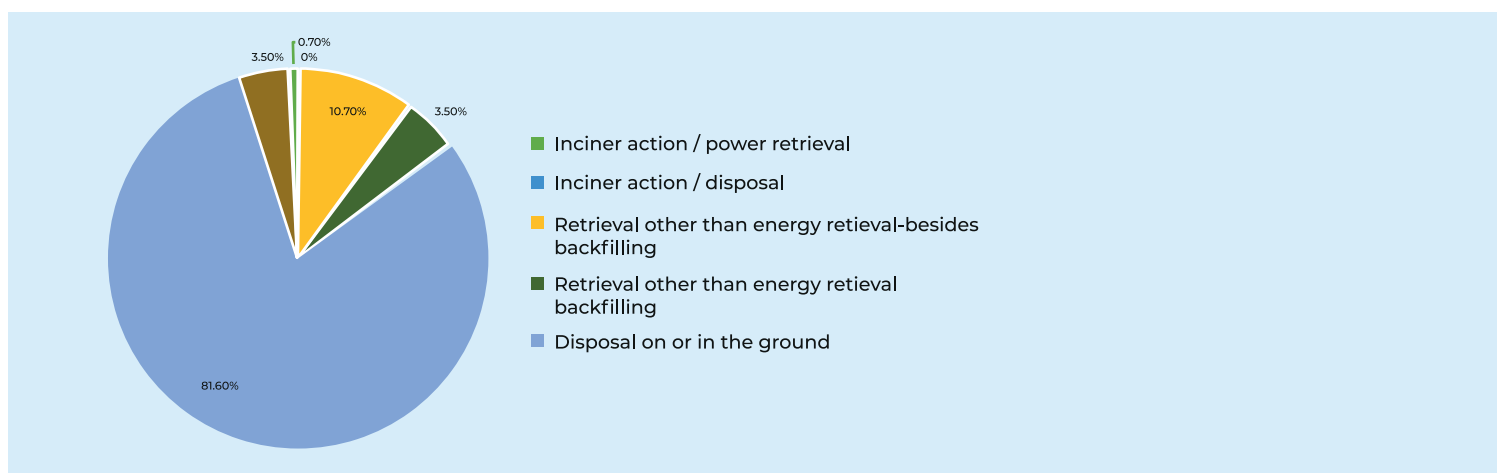


Figure 2. Structure of waste management per management category in 2018.

Source: ELSTAT.

According to the environmental performance assessment report of the Organization for Economic Cooperation and Development (2020) Greece has one of the highest rates of landfilling in EU and it will have to reduce the amount of waste being dumped by 60% in the next fifteen years. This situation unveils the importance of the adaptation of policies that will lead the country to a more circular approach. The adaptation of strategies, such as “Europe 2020”, the climate and energy package of 2020 that aims to ensure the EU meets its climate and energy targets, and the Circular economy action plan will turn these challenges into an opportunity for innovation, economic growth, job creation and improving the quality of life of citizens.

Undoubtedly, Greek institutions and businesses have taken important steps to tackle the waste management problems. Specific practices have been adopted, such as the reduction of reckless use of plastics, the reduction of plastic bags usage, the reuse of electrical and electronic devices, the closure of illegal landfills and holding producers accountable of hazardous waste, to deal with the problem of waste management. These practices are necessary to be applied on a much larger scale, and be extended also to agriculture, livestock and industries.

In that context, the National Plan for Waste Management (NPWM) for the years 2020-2030 is the country's strategic and political planning for its waste management. The main objective is to develop and define the strategy and appropriate measures aimed at protecting the environment and human health. The NPWM is a unified and coherent framework created for the «treatment» of the problem of recycling and waste management: municipal, industrial, agricultural waste, hazardous waste (e.g., asbestos, PCB / PCT, waste of health units), construction waste, as well as waste streams that fall under alternative management (e.g., oil waste, end-of-life vehicles, used vehicle tires, etc.). Sustainable production and consumption models are supported, giving a boost to innovation in the direction of circular solutions (e.g., design, production and use of products that promote reparability, durability and reuse of products, digital solutions that promote synergies between key industries, monitoring and imposition of sanctions).

Finally, regarding the management of the triptych of waste prevention, recycling and reduction of landfills, the development of evaluation tools and continuous improvement of the action plan, the utilization of financial tools (ESPA, LIFE +), the provision of consulting services and training the standardization of rules and good practices, as well as information actions for all those involved are expected to contribute positively and help the country reach the much-wanted adaptation of a circular economy model.

3 Circular economy and Agri-food sector

Following the EU trends, Greece has a new Action plan for the Circular Economy (APCE), that sets the circular economy at the core of its development strategy. The new APCE is structured in five main axes:

- Sustainable production and industrial policy.
- Sustainable consumption.
- Less waste with higher value.
- Horizontal actions.
- Specific actions for basic products to be addressed as a matter of priority.

Circular economy, as a potential factor of productive reconstruction and strengthening, is fully compatible with the structural features of the economy (enhanced small and medium-sized entrepreneurship-social economy), quantities and quality characteristics of the generated waste and the need protection of natural resources from increased anthropogenic pressures, in particular from agricultural activity and its byproducts. The usage of agri-food waste can be analyzed as production of soil conditioners, feed production, biogas and electricity production, reuse of liquid waste, and production of materials.

The high amount of synergy between the two sectors offers in Greece, as it has the scientific potential and know-how, many opportunities for innovation, economic growth, job creation and improving the quality of life of its citizens thus tackling that way the unemployment problems it is facing, but information and training of all actors involved is needed to be able to achieve that.

4 Unemployment

Greece continues to face significant difficulties in stabilizing its economy and meeting its labor market needs, where combined with its inefficient education system leads to structural unemployment. A main problem that the country is facing, like most advanced economies, is that of the transition of young people from school to the labor market as employers believe that there is a problem in finding employees with the right skills. This proves that more education does not necessarily mean better social and economic results.

The overall unemployment rate increased from 7.9% in 2007 to 17.3% in 2019, while the youth unemployment rate from 22.7% in 2007 increased to 35.2% in 2019, more than double the average price EU-28 and the highest among Member States. Moreover, the percentage of young people aged 20-24 outside of education, employment and training (NEETs - Not in Education, Employment or Training) for Greece is 22.5%, ranking Greece among the countries with the highest percentage of NEETs.

One way to tackle the transition problem from education to employment is to connect students more closely with jobs through VET and through the institution of apprenticeship in business, as well as a more general review of «skills policies». The ever-decreasing prospects in labor market, which have mainly affected young people and low-skilled workers, have highlighted the need for continuing investment in initial and adult education, to address skill mismatches and to ensure integration or reintegration into the labor market.





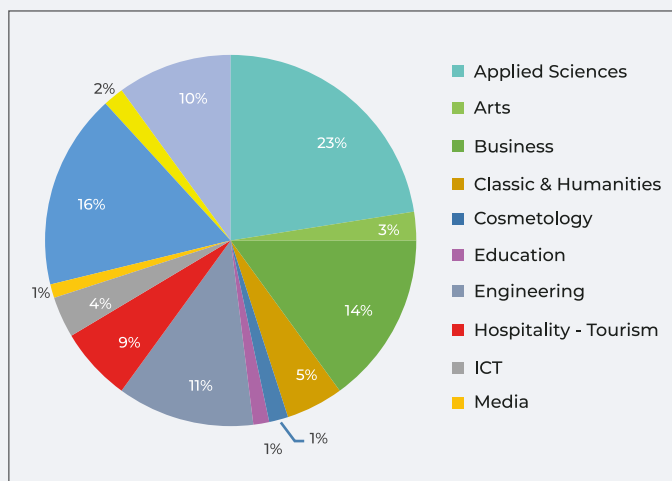
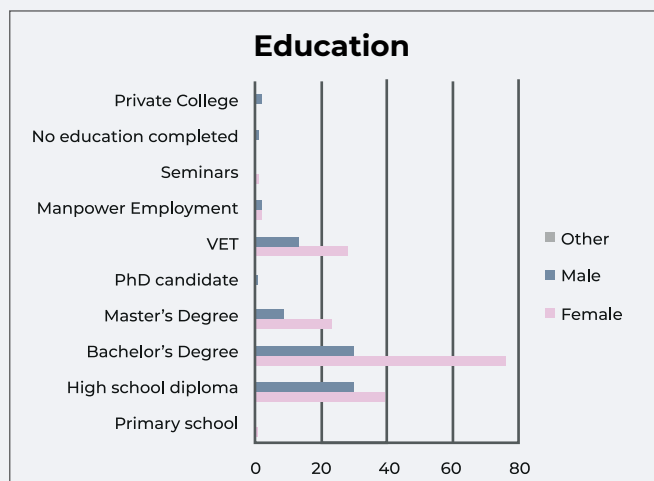
PART B Survey & Data Analysis

1 Introduction

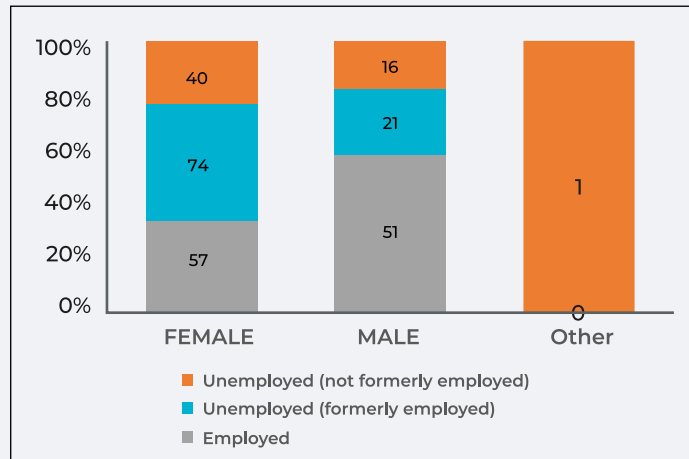
In order to complement the desk-based research, a survey was conducted based on questionnaires and interviews addressed towards economic actors and TVET institutes. The survey also provides data on the current situation of youth, women, and NEETS, and highlights the current status of these sectors in Greece. The survey aimed to obtain a real-time nationwide view around the topics of Green & Blue Economy and Waste Management practices, explore risks and opportunities of the involvement of the mentioned groups and deem these groups' disposal towards a sector with much potential yet not fairly developed in the country.

2 Results of The Survey on the Primary Beneficiary Group

The survey was answered mostly by women, and representatives represented all age groups. The respondents have attended all levels of educations provided by the educational system, specializing in many different sectors. This complies with country's general trends of women having a satisfying educational background, yet struggling to fully engage into the national labor market.



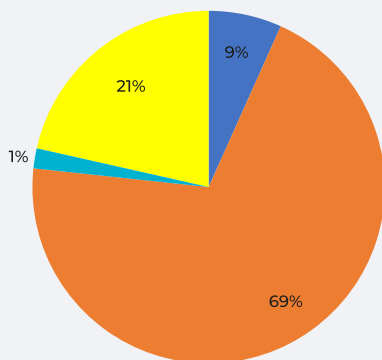
Only 42% of respondents claim that they have worked in positions related to their areas of expertise. Respondents indicate resilience connected to labor market initiatives, creating space towards innovative activities to take place and for them to lead. Additionally, country's general biases and prejudices towards women – including biases in the workplace, maternity situation, diminished to no responsibilities and sexual harassment – make it hard or even impossible to land a job and keep it for an adequate amount of time.



Respondents have different aspirations about their current situation which can be seen below, but most of them are looking for employment. Many responses focused on the current financial situation of the country and the scarcity of job prospects. At the same time, those wanting to attend training expressed their preference for both on-line and on-the-job training.

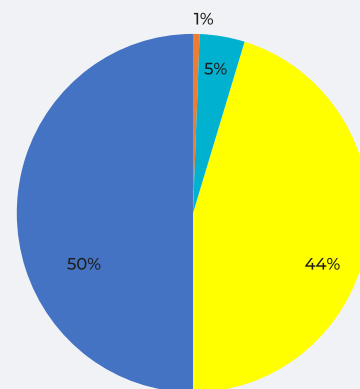
Currently searching for:

■ Continuing studies ■ Employment ■ Training ■ Nothing



Future training courses:

■ Yes, on the job ■ Yes, online ■ No ■ Post graduates studies



By far, the most popular occupational field among participants was business (42.1%), while some fields were considerably preferred over others; for example, the agri-food sector was selected by more than one fourth of respondents (26.8%), and social services and tourism/hospitality services by more than one fifth or respondents each (20.7% and 21.1% respectively). On the other hand, waste management, renewable energy and science were not among the most preferred ones (8.4%, 10.7% and 11.9% respectively).

Regarding sustainability concepts, about half of respondents were not sure about either Circular bio-based Economy, waste management policies or sustainability policies currently implemented at national level (~46%, ~44%, and ~50% respectively). However, when it comes to recycling, the majority of participants (~79%) were positive that relevant plans and policies are being promoted in Greece, and four out of five respondents pointed out that they are, at some level, committed to recycling.

As for matters related to inclusion of Youth, Women, and NEETs in the labour market, respondents were mostly aware about the training and employment programmes implemented by the Manpower Employment Organization of Greece. However, more than one third of participants (~37%) were not aware of any employment policy for young, women, and NEETs, indicating a rather low level of involvement.



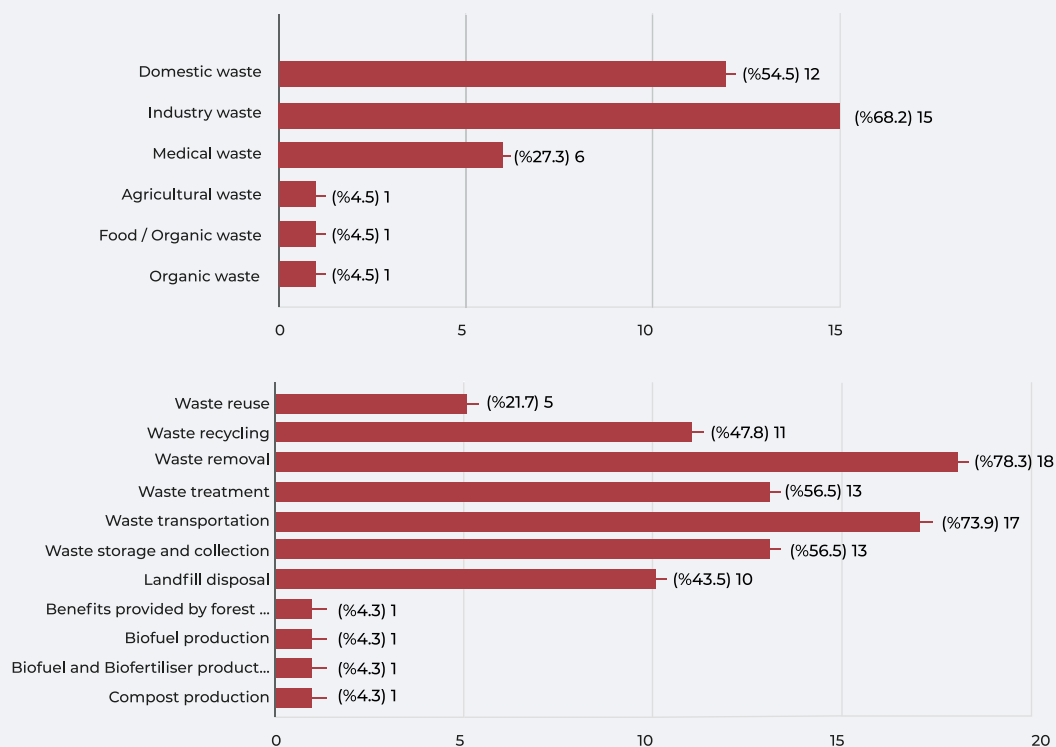
3 Results of the Survey on Economic Actors of The Agri-Food and Waste Management Industries in Greece

3.1 General overview of respondents

128 economic actors of the Green and Blue sector took part in the survey (103 filled the questionnaire and 25 were interviewed), representing companies of all sizes, years of experience, fields of expertise, and locations. The majority of the actors are owners of a private business, with less than 10% belonging to co-ops.

Companies of the Agri-food sector show a wide range regarding their field of specialization, as a company's production does not only rely on one activity. Most companies are connected to crops (40.7%), livestock (17.3%), dairy products (14.8%), agricultural industry (24.7%), organic crops (16%), organic farming (16%) while over half of them participate in additional secondary activities like processing, supply and management. Fishery, forestry, orchard are also fields of activity not so commonly met among respondents, occupying percentages below 5%.

Companies active in the Waste Management sector also deal with different types of waste management activities, as seen below:



3.2 In-demand skills and competences by Economic Actors

According to the respondents, a change in skills' demand is obvious in the last five years: trends towards an eco-conscious mind-set and knowledge around green and blue topics have surged. Additionally, the rapid advancement of technology urges for better ICT competences that will advance production in all levels. Complementary to the ICT skills are Digital Marketing skills as the extensive competition in the global market strains advertisement. Lastly, specialization in one sector is a commonly required as the "One size fits all concept" has been eliminated a long time ago. Interestingly, companies prefer graduates ready to undertake positions coming with great responsibility, orientating towards VET graduates – a sector entirely ignored in the country almost a decade ago.

In order to adapt to these changes, most economic actors are interested in training courses for themselves and their employees that could advance their skills and ability around the sector. Learning about the latest advances in the technological sector and how these advantages could foster both Green and Blue sectors to prosper, accreditation of activities and products, extensive managerial skills, smart farming methods and sustainability of products and activities, ICT skills and competencies, green & blue economy skills, management on the agricultural sector and soft skills are the responses encountered more often.

3.3 Sustainability perspective for Economic Actors in the Agri-food Sector and in the Waste Management Industry

Circular bio-based Economy concept, Governmental Sustainability policies and Waste Management Policies are three practices quite unfamiliar to the Greek territory. Under question about “Sustainability Policy Plan or Environmental Sustainability Measures”, respondents expressed numerous interesting opinions, indicating that only through collective efforts progression is promising. Some companies invest on energy efficient buildings and equipment, measurement of the carbon footprint, implementation of the 3Rs (Reduce/Reuse/Recycle). Moreover, they suggest that if Waste Management is assimilated into the Agri-food sector, 60.2% of the respondents support that it could lead to fully environmentally sustainable businesses.

To implement a sustainable food chain, education and awareness raising campaigns can play the key role in people’s information and efforts. Additionally, the responses diverged depending on the expertise respondents had and their position in the company. Besides education and awareness campaigns, sustainable food chain could be achieved through better exploitation of green & blue practices, sustainable production and water management, open data during production and distribution stages, support of fair trade and inclusive sharing of benefits.

When it comes to Sustainability Policy Actions or any relevant Environmental Sustainability Measures that stand out as good practices, companies have done some progress. Adoption of Environmental Monitoring Plan, recycling practices, support of sustainable aquaculture initiatives at an international level, exploitation of by-products in a beneficiary way for the environment, utility of biodegradable materials and packing recycle are the sustainable practices highlighted during the interviews.

3.4 Opinions about inclusion of Youth, Women and NEETs in the labour market

Country’s effort to fully engage the vulnerable groups of Youth, Women and NEETs are extensive through Manpower Employment Organization (OAED) which implements programs responding to most target groups’ needs. Additionally, EU funding opportunities do benefit these groups as they are specialized projects focusing on these crowds’ development both soft and hard skills. As for recommendations to further increase

inclusion of vulnerable youth, actors suggest better connection between labour market and the educational institutions, resolution of gender pay gaps, respect on maternity needs, joint efforts focusing on career days, CV screening and paid internships, mentoring and coaching guidance etc.

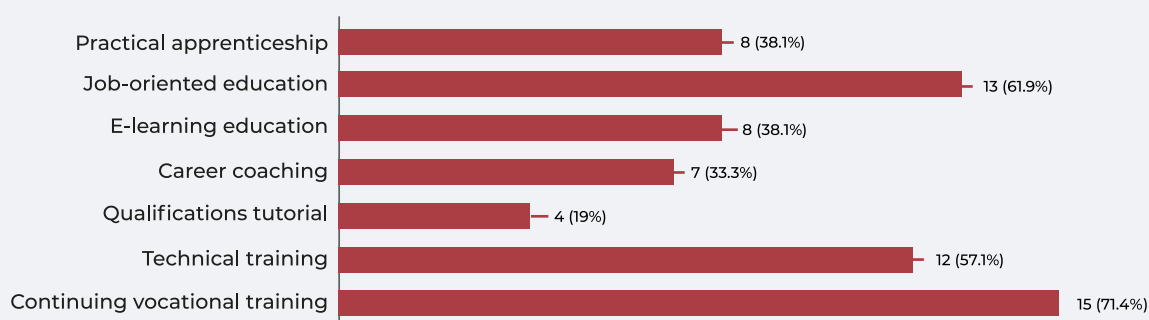


4 Results of the Survey on TVET Institutions

4.1 TVET institutes profile and provided services

The questionnaire was distributed through the national network of Eurotraining Educational Organization, aiming to reach as many parts of the country as possible. 46 TVET representatives of both public and private institutions responded to the survey (21 in the questionnaire and 25 in the interviews) coming from metropolitan as well as urban areas. Their field of specialization presented a wide variety of sectors, ranging from engineering, economics, and social sciences, to agronomy, law, and ICT studies.

A variety of responses was also noticed when it comes to the types of courses and training programmes provided.



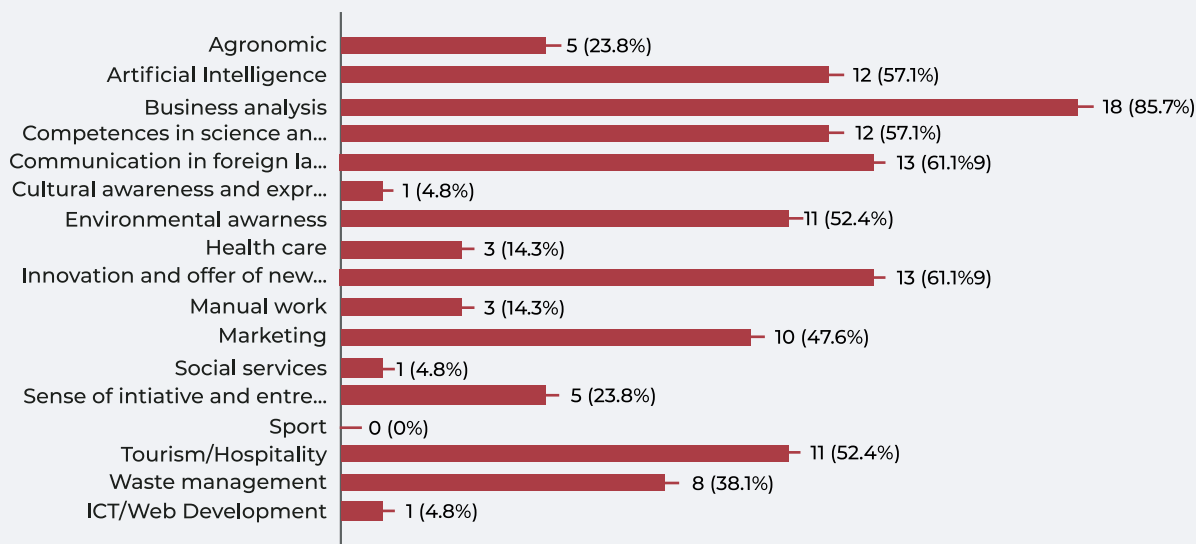
The vast majority of main beneficiaries of TVET courses were reported to be secondary school graduates and, in fact, recent graduates, as most TVET attendees were between 18 and 24 years old, almost equally distributed between men and women.

It is important to note that nearly three quarters of the respondents highlighted that the TVET sector receives a lot of criticism from various actors of the labour market, the educational system, and society in general. Bureaucratic procedures and the quality of training courses provided are mostly disputed and provide room for skepticism on the contribution of TVET to bridging the gap between skills demand and supply.

In fact, most of the criticism related to TVET in Greece stems from the perception that TVET is an inferior option for young people, as only students who are not “good enough” to secure a placement to higher education through exams are interested in TVET attendance. This is evidently reflected throughout the society and the labour market, where for example VET qualifications are not widely recognized and VET graduates tend to receive lower salaries compared to higher education graduates with similar skills and knowledge. It should be mentioned, though, that the majority of respondents (76.2%) claimed that their institutes are operating mechanisms to enable credible and fair cross-border recognition of skills.

4.2 In-demand skills and competences

The changing nature of the labour market in Greece is clearly depicted in the following graph summarizing TVET representatives' views on the skills more requested during the last five years. A significant lack of skilled workforce has been identified in environmental-related sectors, including agriculture, environmental awareness, waste management, and technology-intense sectors, including ICT and digital networks, and innovation and offer of new products.



TVET representatives seemed to be significantly familiar with circular bio-based economy (85.7%) and the sustainability concept (95.2%), while the majority of them (81%) mentioned that the sustainability principles have affected or are affecting their training provision. In many cases, the curricula have been updated to correspond to sustainability concepts, training services are becoming “greener”, and inclusive methods are adopted to provide fair and equal training opportunities to all.

4.3 Opinions about inclusion of Youth, Women and NEETs in the labour market and employment policies services

In general, respondents reported that an inclusive approach in the Agri-food sector and the waste management industry can be promoted through targeted raise awareness and informative campaigns, through equal integration of men and women to the sector, as well as through investments to enable access to the labour market for younger people and low-skilled groups of the population. It should be noted that the overall mindset of respondents was that even though classes are formulated on the basis of balanced gender distribution, this is usually not enough to lead to equal employment opportunities and consequently equal pay, since many more external factors impact on gender equality in the labour market. A greater involvement of public authorities and a structured framework of policies towards inclusion in the sector were highlighted as potential factors of significant change. The role of local communities and the importance of a transition towards local products and businesses were, also, mentioned to contribute to the promotion of inclusive approaches.

Among the priorities to support Youth, Women, and NEETs’ employment, respondents singled out the provision of equal opportunities for all in accessing quality training and professional opportunities and in receiving equal pay for equal work. Addressing brain drain and supporting a smooth recovery from the impacts of COVID-19 can, also, contribute in supporting employment of beneficiaries. As significant achievements of the current policies implemented for the employment of the target groups, TVET representatives mentioned the implementation of co-funded programmes and subsidized training-internship programmes for youth employment, the reskilling efforts according to the labour market’s needs, and the internship schemes that can potentially lead to permanent job positions. These programmes usually target specific groups of the population (e.g., long-term unemployed, young unemployed, low-skilled youth, vulnerable groups, etc.) and/or specific regions of the country where particular needs have been identified. During the interviews, representatives of TVET highlighted the need for reskilling and up-skilling of these specific target groups.



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