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**WP3 NEET and BaCE Profiling
REPORT
O.3.2 Economic sector profiling (Blue and Circular Economy):
existing situation analysis
ENI CBC MED Programme 2014-2020
HELIOS Project**

11.11.2021

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INTRODUCTION

This document provides an overview of the results from a series of surveys carried out by partners participating in the ENI-CBC project HELIOS regarding companies operating in the Blue and Circular Economy (BaCE) in local partner regions. It is a needs/gap analysis to illustrate the existing situation in these sectors and to identify the specific skills needed to allow the BaCE to develop, providing employment in the local area.

The results of the surveys will allow the Helios project to focus on those areas of the BaCE with high potential for sustainable job creation and to orient training courses and course curricula towards closing the skills mismatch. The survey results will ensure that NEETs participating in the courses are provided with the skills needed to fill those profiles and foster development in the local BaCE.

For the local economies belonging to the Helios partners, the sector with the greatest potential was identified as the Blue and Circular Economy as partners are mostly located in coastal towns. In some partner areas, the fishing sector still plays a considerable cultural role, in other places this connection has been lost and the fishing sector no longer enjoys the esteem it once did, especially in the eyes of the younger generation. The Helios project seeks to generate interest in the BaCE and its huge potential as the basis for sustainable, regenerative and inclusive growth.

Creating links with local industry to determine their specific needs is crucial for TVET institutions and course designers if courses are to be of use to the local economy and to vulnerable groups in society by providing job opportunities. Links established with the local economy ensure that courses are tuned to local needs, provide the opportunity of work placements, provide updating for TVET trainees and facilitate skills matching.

The aim of this survey was to maximize the effectiveness of the skills-matching process through three different steps:

1. Identify enterprise labour needs in the BaCE sectors
2. Develop training courses tailored to fit those needs
3. Maximize employability through specific methodologies integrated into the course curricula.



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The Project uses a bottom-up approach, starting from enterprise needs, in order to obtain best results in terms of new employment and business creation. Helios strives to involve local enterprise in coaching and mentoring activities, during all stages of training, to promote self-entrepreneurship, especially in innovative BaCE activities, such as waste management. Activities are carried out in all partner countries, taking care to define common profiles and curricula with the correct degree of flexibility to take into consideration the different economic environments and backgrounds of the target groups.

Data collection activities for this report included surveys, direct interviews with local enterprise, workshops, meetings, questionnaires and statistics from relevant local authorities in order to collect data on subsectors of local BaCE with greatest potential for growth/job opportunities (COVID-19 measures permitting).

This report must be consulted together with Output 3.1 (Link to [3.1](#)) as both are to be considered complementary to acquire an understanding of the local partner contexts.

THE IMPORTANCE OF THE BACE FOR ECONOMY

By way of introduction to the results of the Helios economic sector survey, the following is a brief description of the concept of the Circular Economy, as expressed by the European Parliament:

*The circular economy is a model of production and consumption, which involves sharing, leasing, reusing, repairing, refurbishing and recycling existing materials and products as long as possible. In this way, the **life cycle of products is extended.***

*In practice, it implies **reducing waste** to a minimum. When a product reaches the end of its life, its materials are kept within the economy wherever possible. These can be productively used again and again, thereby **creating further value.***

This is a departure from the traditional, linear economic model, which is based on a take-make-consume-throw away pattern. This model relies on large quantities of cheap, easily accessible materials and energy.



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Also part of this model is planned obsolescence, when a product has been designed to have a limited lifespan to encourage consumers to buy it again. The European Parliament has called for measures to tackle this practice.¹

We are increasingly witnessing the principles of the circular economy being applied to all economic areas; recycling and reusing no longer simply aims to reduce the impact of different industries but also to create low-cost raw materials for other sectors.

The Blue Economy has an inherent circularity in its principles and seeks to ensure sustainability in the use of resources of marine origin. Applying the principles of the circular economy, therefore, proves not only essential to combat climate change and the depletion of non-renewable resources but is also strategic in the attempt to create new economic models, increase employment and improve the quality of life for all living things.

Jobs and circular economy or blue economy

As highlighted in the previous paragraph, there has been a sea change of interest towards environmental issues and the circular economy in recent years, with an explosion of scientific literature on the issue and growing interest in the transformation of the entire production sector.

Converting to the circular economy undoubtedly entails retraining staff or moving towards new hires that are aware of the company's new needs. Here we report a paragraph extracted from a paper written by Alessandro Pernice, Helios BEN coordinator, which illustrates the dynamics relating to the potential that the blue and circular economy brings to the global labor market:

¹<https://www.europarl.europa.eu/news/en/headlines/economy/20151201STO05603/circular-economy-definition-importance-and-benefits>



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The shift to a Circular economy (CE) has had an impact on labour markets around the world. While some jobs disappear, others will take their place in the future. It is undeniable that the labour market for young workers, employers, professionals, etc., has changed intensely in recent years due the above-mentioned transition from the linear concept to CE. New “circular jobs” are emerging to replace those in decline.

All of this is very easy to explain, since new “marketable skills” become more important than others, and workers and employers are required to develop new mindsets and skills to adapt to changing environments. In fact, in order to fight climate change, resource depletion, and achieve economic and inclusive growth, new skills and new jobs must be created. As mentioned by several studies present in the literature, the transition to the CE brings new business models and considerations into play, requiring also Policy actions to be reconsidered. The European Commission has adopted a package of measures and legislative proposals to boost sustainable growth and help Europe make the transition towards a more CE. The first set of measures focused on relevant process components and goals, such as Resource efficiency (i.e., using resources more efficiently), Eco-innovation (i.e., enabling green growth), Raw Materials (i.e., ensuring our use of raw materials to avoid depleting the planet’s resources), Production (i.e., promoting greener products and supporting greener companies and organisations), Consumption (i.e. providing transparent information to consumers enabling them to make greener choices) and Waste prevention and management (i.e., reducing waste and improving waste management). All these measures, which aim to preserve our environment, to use natural resources in the most efficient way and without depleting the planet’s resources, have strongly impacted the labour market in the past years. They offer tangible and positive experiences in our daily life by creating benefits for our cities as well as new jobs in a variety of fields (agriculture, fisheries, manufacturing, research and development, tourism, energy, public services, etc.).

These measures were then subsequently strengthened and extended by the new circular economy action plan (CEAP) adopted in March 2020 as one of the main building blocks of the European Green Deal (EGD). I am convinced that the EGD initiative and its implementation Plan will help future generations



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of workers to build the skills needed by the new market, to find their inner confidence, realise their potential and create a better future for themselves, by providing training for the transition and future “Circular jobs”. It is worth mentioning that the current literature defines Circular job as any occupation that directly involves or indirectly supports the strategies of the CE. As mentioned in the website of CIRCLE ECONOMY, circular jobs can be divided into three basic types: core, enabling and indirectly circular jobs.

The first type “Core circular jobs” contains all jobs that ensure the closure of raw material cycles, including jobs in repair, renewable energy, waste and resource management. Examples of these jobs include agronomic advisors, repair technicians, process operators. The second type “Enabling circular jobs” contains all jobs that remove barriers for and enable the acceleration and upscaling of core circular activities, including jobs that come from design (equipment engineers), digital technology (information managers) and education (teachers). The third category include those jobs that provide services to core circular strategies, including jobs in information services, logistics (e.g., courier) and the public sector. All these jobs require special knowledge and new skills in relation to economic sectors and territories, which can only be ensured through capacity building actions and tailored training courses. From 2014 onward, the European Commission has committed itself to ensure that Social inclusion and tailored trainings targeting young people, women, NEETs, jobseekers, entrepreneurs, farmers, etc., are placed in its funded Programmes dealing with European Territorial Cooperation (ETC), European Neighbourhood Policy (ENP) and Research and Innovation.

The recognition of social inclusion as the driving principle for the EU Programme’s participatory framework was the best thing that happened to Project Managers (including me) and the best solution to meet new labour market demand across Europe, as only by investing in our young generation, professionals and entrepreneurs will we be able to open new horizons for a greener and more prosperous future. For the first time, under the programming period 2014-2020, several EU funded Programmes focused on ETC and ENP (e.g., Interreg VA Italy Malta, ENI CBC MED 2014-2020, etc.) included a Priority axis dealing with “Social inclusion” to address skill deficiencies and skills mismatch by



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supporting trainings and capacity building actions. One of the main sectors that absorbs new workers is CE. The outcomes of the analysis conducted by the experts who have elaborated the last EU Programmes (under the programming period 2014-2020) revealed that there is a prominent skills mismatch between job requirements and workers.

These outcomes were the starting point of the project design of four EC Funded Projects implemented by ARCES University college of Italy, such as HELIOS, GREENLAND, CLUSTER and CITRIVET, the first three of them approved under the framework of EU Programme “ENI CBC MED and the last one co-funded by ERASMUS+. Two of them are described below in this paper. To give the reader just concrete examples of what mismatch means, EUROCATIV in 2019 stated that “according to the Skills for jobs database by the Organisation for Economic Co-operation and Development (OECD), at least 80 million workers in Europe are mismatched in terms of qualifications”. This means that workers lack the proper qualification for the job they have been hired to do, either because they are under-qualified or overqualified. According to the OECD, this is the case for 42,0% of workers in Greece, 41,0% in Portugal or 37,0% in Germany. The so-called ‘skills shortage’ has an economic impact both on workers and businesses. On the one hand, the workers who perform tasks they are not qualified for tend to earn up to 24,0% less than those properly qualified. In Italy, this results in salaries reduced by 4,000 euros per year and around 8,000 in Germany. On the other hand, companies experience difficulties in hiring people for the openings they have. This results in long-time unfilled positions, which leads to delays in the production process.²

The productive reality of the Mazara del Vallo Fishing Distrit, Italy District Development Pact

² Source A.Pernice, HELIOS and CITRIVET projects: two examples to boost circular economy and rural-urban development in Mediterranean cities. Conference “XXIII Jornadas Internacionales de Patrimonio Industrial” “CIRCULAR ECONOMY AND CREATIVE INDUSTRIES” 5th July 2021 INCUNA association



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The Distretto della Pesca e della Crescita Blu - COSVAP (Sicilian Fisheries and Blue Growth Cluster) operates as a cluster of enterprises with common interests and activities, according to a horizontal and vertical supply chain logic, and is characterised by the co-presence of public and private entities.

Established in the form of a non-profit consortium and recognised by D.A. 182/12.S of 26 February 2008, renewed by D.A. 511/GAB of 13 October 2011, D.A. 332/GAB of 30 December 2013, and by subsequent D.A. 164/GAB of 20 February 2020, and by subsequent D. A. 2493-11S of 15 November 2021 carries out actions aimed at the protection, valorisation and rationalisation of the productions of excellence of the agro-foetic-food sectors as well as at the development of enterprise systems and favouring their internationalisation processes.

The production chain working through the District is characterised by activities ranging from the catching, mariculture and fish farming, to the processing and transformation of fish products, to the marketing of the catch, including all the services operating for the so-called 'Fishing Industry', such as shipbuilding (construction, maintenance and repair of fishing vessels), as well as the part of technical, logistical and support services for the processing and marketing of fresh, processed or frozen/frozen fish products.

The primary processes considered to be key components of the supply chain are production, preparation, treatment and sale.

This is followed by the 'support' processes, which are necessary for the management of all activities that cross all primary processes and relate to them: systems for quality management, traceability and retraceability, environmental, social and administrative accounting aspects.

Support processes contribute to the creation of value, not always in a mediated manner, by fostering the effectiveness and efficiency of primary processes, providing them with inputs, technologies, human resources.



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To summarise, it is possible to group the activities of the supply chain according to a typology that simplifies their reading:

- Shipowning
- Aquaculture (fish farming)
- Processing
- Shipbuilding
- Services (workshops/specialised companies)
- Governance

Ultimately, the supply chain system presents a complex and articulated structure, with cross-functional processes, involving both different functions and processes that are transversal to the different activities listed above, such as: refrigeration, freezing, packaging, salting, smoking, preservation in oil and packaging. These functions can be performed in parallel and in different ways, ranging from artisanal to industrial.

COSVAP enterprises and general needs

As analysed by the District, the companies in the sea chain are very articulated but despite the heterogeneity they encompass, they present a common factor which is the economic one. In fact, the companies operate in order to produce revenues from which, as in the other sectors, widespread social benefits originate.

The global socio-economic situation, already severely depressed, collapsed in the wake of the recent COVID-19 pandemic, but today the 'heroically surviving' economic realities, despite the new energy crisis that erupted recently, are (as is well known) showing a strong will to continue tenaciously despite knowing the objective and numerous difficulties that are once again confronting them.



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The more structured companies have clearly shown greater resilience than others, but regardless of this, COSVAP, in line with its always inclusive policy, wants to be an instrument of support not only for its member companies but also for those that request it.

To cope with this, the District is endowed with a Statutory Body of a Technical-Scientific Character called the Mediterranean Fisheries Observatory, a body recognised and deputed *ex-lege* to search for solutions aimed at providing support not only to companies but also to the Sicilian Regional Administration.

Through the research activities of the Mediterranean Fisheries Observatory, it has been possible to survey the general needs of companies in the seafood supply chain that, for their growth, have manifested the need for support in their approach to: attacking markets, including new and/or even international markets; access to credit; process and product innovation; sustainability.

To date, many companies belonging to the various sectors of the fishing industry, although in obvious and widespread difficulty, express the will to go ahead with their business plans and to do so they would like, in some cases, to equip themselves with innovative, pre-formed and low-energy equipment as well as new and additional human resources such as external consultants and/or to be integrated into the workforce.

The most structured companies are often looking for H.R. to be used to strengthen back office and front office activities, these are heterogeneous and differentiated also according to the sector to which the company belongs, especially in processing and services.

Prevalent is the search for highly qualified and unskilled figures; experts in the field of economics; sales; the most common international languages (English, Arabic, Spanish, French, Chinese and Russian); specialised and unskilled labourers; administration and accounting; point-of-sale workers; image and marketing managers; energy and environmental management experts; and Information and Communications Technology.



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The Distretto della Pesca e della Crescita Blu - COSVAP in Mazara del Vallo has for decades been committed to finding solutions to the problems of the fishing sector and to supporting companies in the sector.

Every year for the past eleven years, COSVAP's work and actions have been disseminated to the public through the realisation in Mazara del Vallo of the Blue Sea Land - Expo of the Mediterranean, African and Middle East Clusters, a true festival of the Blue & Circular Economy, attended by dozens of Trade Delegations made up of Entrepreneurs, Buyers and Stakeholders, Scientific Delegations made up of representatives and experts from National and International Public and Private Scientific Research Organisations, Diplomatic Delegations made up of Ambassadors and Consuls from the Euro-MED area, Institutional Delegations made up of Mayors, Ministers and Heads of State in official Political Representations of Euro-MED area cities and countries, as well as over 150.000 visitors registered at the last edition held before the COVID-19 Pandemic.

METHODOLOGY

To ensure a certain level of homogeneity, guidelines were drawn up on the methodology to be adopted for administering the questionnaire by identifying, first, the main stakeholders. It was suggested to contact any of the following sources to gather stakeholder information:

- The Chamber of Commerce which provides lists of companies operating in these sectors
- Internet search of local companies
- Business development agencies, incubators etc. for a list of new start-ups which might have a more circular or inclusive approach



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- TVETs which may have lists of companies interested in training courses for in-house staff training or who have collaborated with the TVETs in the past
- Ministry of Fisheries and Agriculture, or other relevant public offices
- Labour agency organisations (Public and Private)

Stakeholder mapping allowed us to focus our attentions on the types of companies present in the territories belonging to the BaCE.

In line with the need to apply a standard of action, two main steps were identified:

- Phase 1 – send an email with a questionnaire to as many local BaCE enterprises as feasible. This could be within the range of 100-200.
- Phase 2 - depending on the response rate and the number of questions answered, companies should be selected (from a diverse set of key economic areas) to complete the questionnaire via direct interview (via telephone or video conference)) in order to obtain a complete data set for a minimum of 20-25 companies.

As regards the questionnaire phase, a degree of difficulty in reaching companies was encountered. Greater success was found through direct telephone contact or referrals rather than email. The fact that the economic profiling needed to be carried out during the first half of 2021 to ensure that curricula development was not impeded even further, undoubtedly meant that responses were affected by the pandemic. The global economy was badly affected by the crisis and many companies were fighting for survival or had closed temporarily during the second wave of COVID-19.

Generally, if email response was found to be slow, partners switched to direct telephone contact in order to guarantee the greatest possible support in completing the questionnaire.



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DATA COLLECTION DURING COVID-19

The ongoing epidemic has certainly encouraged the partners of the Helios project to research virtual and digital methodologies to administer the questionnaires to the different stakeholders.

The contacts made by email, through chat and conveyed by telephone contacts compensated in part for the inability to hold face-to-face meetings; however, people-to-people contact would certainly have represented a precious opportunity for the project itself.

DATA ANALYSIS

The data presented in the following pages summarize the reports developed individually by each partner participating in the Helios project. The questionnaire used to collect the data can be found in the annexes below. To ensure a certain degree of homogeneity in the data collected, partners were encouraged to use the same questionnaire. Small changes were made only where considered strictly necessary and in consideration of socio-cultural variables.

178 companies were reached who responded to the questionnaire providing us with a key database for understanding the socio-economic fabric of the regions involved in the study.

The questionnaire was formulated in such a way as to collect useful data for identifying the types of companies present in the territories and the relative dissemination of practices already initiated for the Blue and Circular Economy.

Since our interest was mainly to collect data to be used to develop the training curricula and transfer the skills necessary for these particular economic sectors, the questionnaire was divided into three different sections:



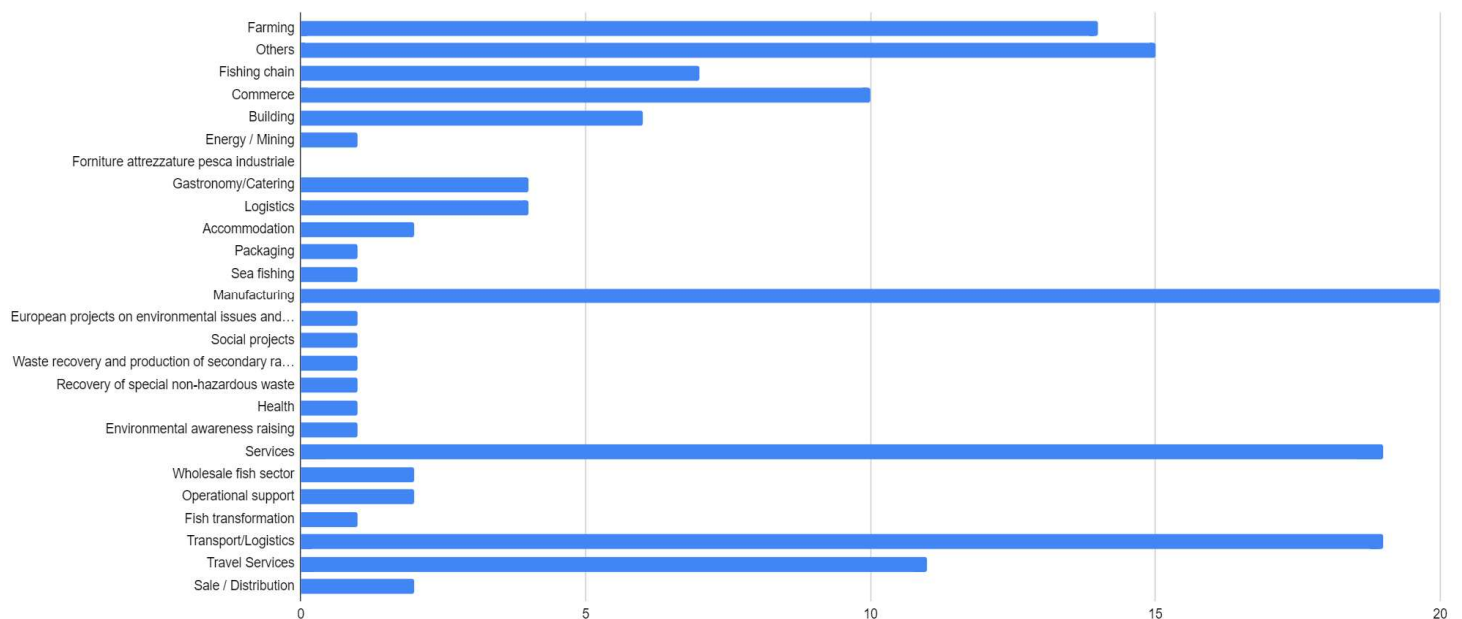
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- Data on the company and the identification of the sectors in which it operates;
- Data on employees, level of training of current employees and the presence of young people and women within the labour force (the target NEETs of the project);
- strategic and operational plans for the future expansion of activities and their level of interest and participation in the Helios project.

COMPANY DEMOGRAPHICS

WHICH SECTOR OF THE ECONOMY DO THE COMPANIES OPERATE IN?

Sector of the economy



Identifying the sector in which the companies operate has proved to be a complex process as many companies operate in several sectors to diversify the market and ensure business continuity throughout the year.

However, it is clear that production, services and transport are among the most common sectors. Although the large presence of companies in the production sector is not surprising as our questionnaires were aimed at sectors in which principles of the blue and circular economy are already considerably developed, and potentially already implemented in practice, the other two sectors indicate that many other sectors are also taking an interest in implementing sustainable practices.



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Agriculture and tourism sectors are also very present, together with trade.

DO YOU OPERATE USING ANY OF THE PRINCIPLES OF THE CIRCULAR ECONOMY OR BLUE ECONOMY?

Participants were asked questions to identify companies which operate using principles of the blue and circular economy, at least in part or not at all.

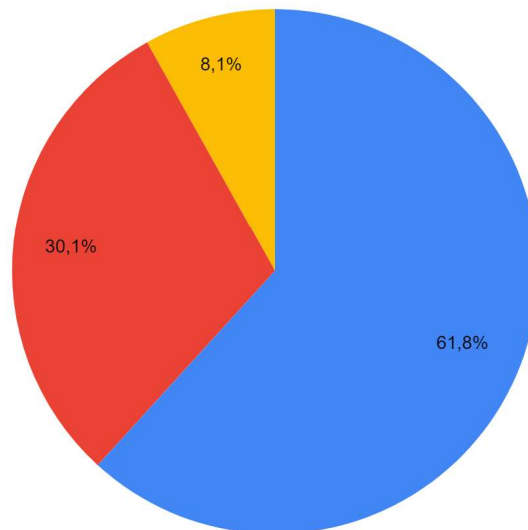
The general picture shows us that the circular economy appears to be more widespread than the blue economy. This may be surprising as, in general, partners targeted companies working in the fisheries sector, where possible within the local area. This result may be due to overlapping (as many of the circular economy principles are also intrinsic to the blue economy) or may be due to a lack of understanding of what constitutes either of the principles concerned.



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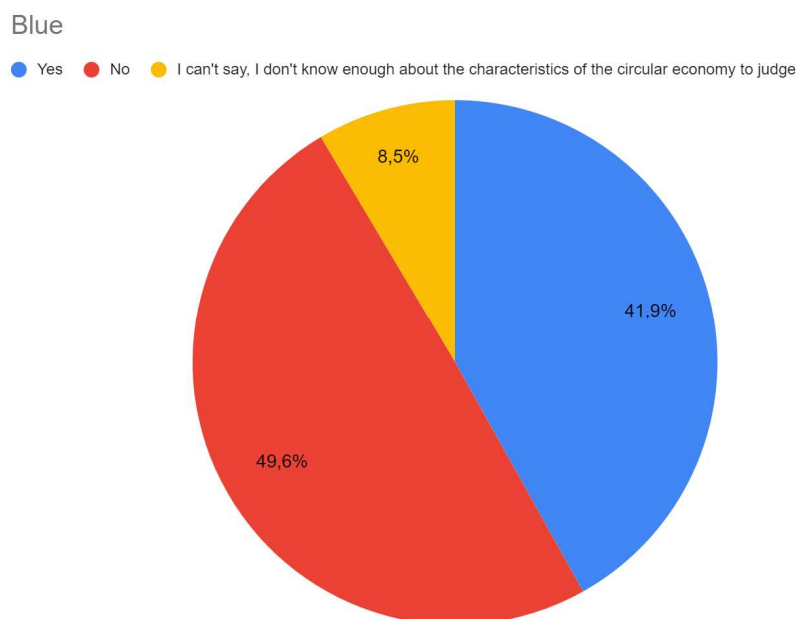
Circular

● Yes ● No ● I can't say, I don't know enough about the characteristics of the circular economy to judge





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Undoubtedly of primary concern is the large percentage (between 30-50%) of companies which declared they did not know enough about the subject, or which directly declared they did not use any of the principles in their production process. However, this also demonstrates the huge potential and gap in the labour market for people with skills in this area. This area will enjoy considerable expansion in the coming years and our labour market must be prepared with the skills to fill the gap.

YEARS OF ACTIVITY

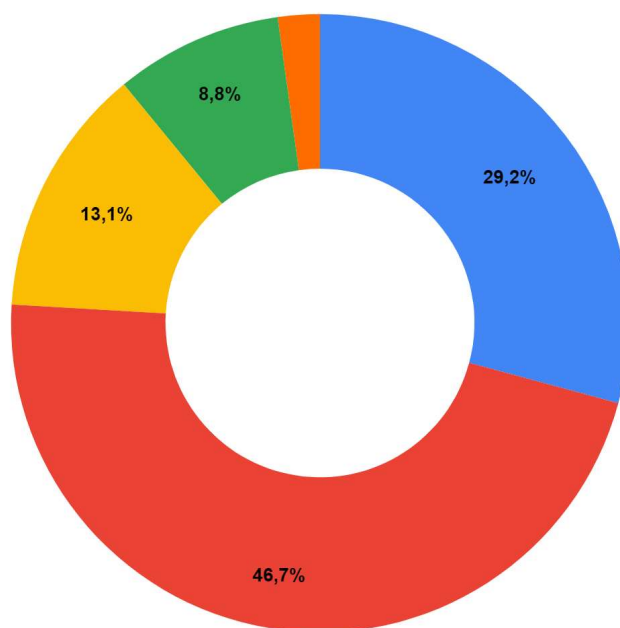
Other useful information for the purposes of our research is that concerning the age of the company. It is clear from the graph below that almost 80% the companies have been active for 10- 20 years. This is encouraging as long-established companies demonstrate a good degree of stability in the economy. They potentially have the resources to invest in sustainable practices, including new HR to face these needs. However, younger



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companies tend to have a greater rate of growth, also in terms of HR, and may also be more open to adopt innovative, more sustainable methods of production, which older companies may resist.

● 11 to 20 years ● For more than 20 years ● 6 to 10 years ● 2 to 5 years ● Less than 1 year



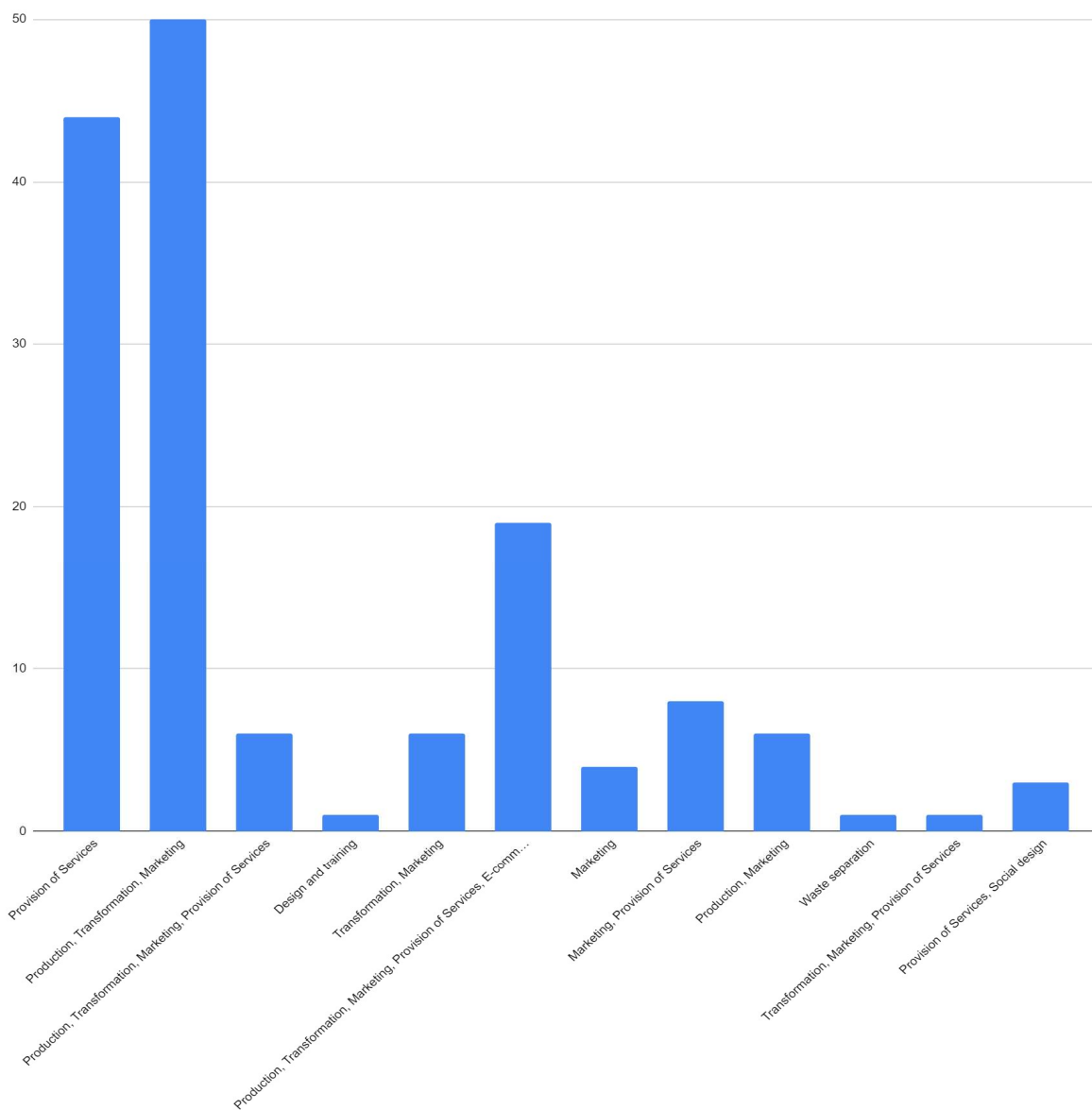


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WHICH OF THE FOLLOWING STAGES OF PRODUCTION ARE FOUND IN COMPANIES



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To understand more about the type of skills needed within the companies participating in the questionnaire, we also dedicated a section to the type of production stages or the type of operations they carry out.

The questionnaire was designed with multiple choice answers to identify as many details as possible.

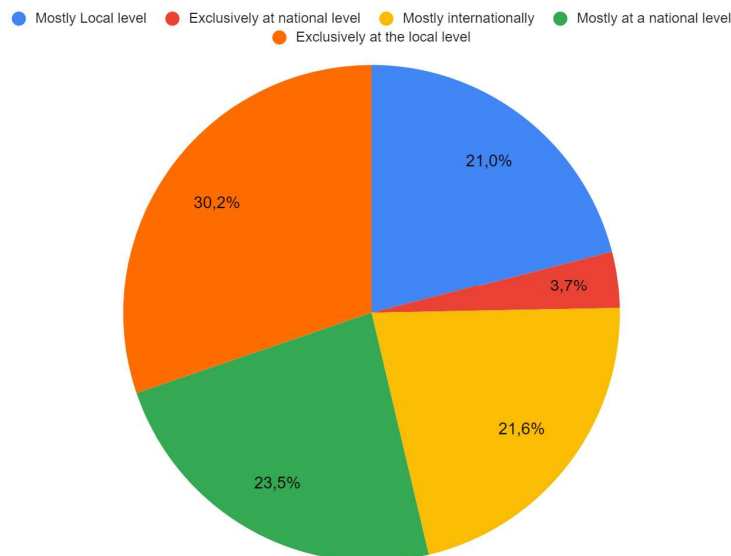
It is clear from the responses that companies from a large range of sectors answered. There are many companies in the industrial or production sectors, which also manage a range of operating units, such as marketing and provision of services (including e-commerce), in addition to processing. Another large sector appears to be the provision of services.

TARGET MARKET OF THE COMPANIES



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The graph above illustrates that the majority of companies operate *mostly* on a local, *mostly* national or *mostly*

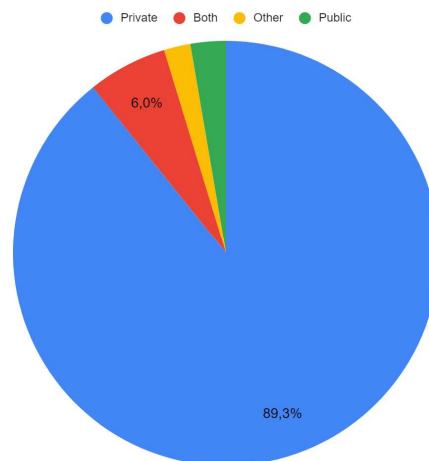


international level rather *only* on a local level or *only* on a national level. It is interesting to note that almost a fifth of companies in the questionnaire work mostly on international markets, and, therefore, with potential for growth and the need for linguistic skills. As regards the remaining 80% of companies (which we can assume from the data do not operate for the most part on international markets), there is major potential for expansion, especially from exclusively local (30%) to national markets, and from national to international markets. Expansion undoubtedly requires new skills (adapting products to new market needs, marketing, transport logistics etc.).

TYPE OF ORGANIZATION



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Most of the companies surveyed are private.

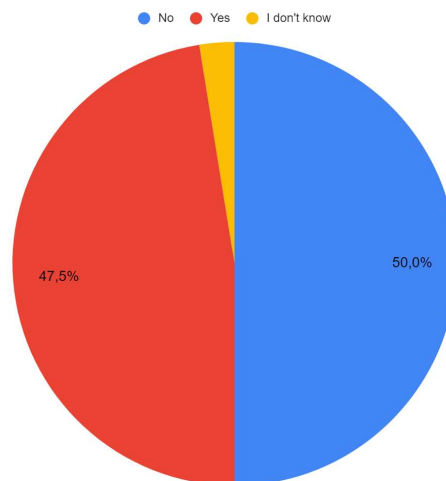
HAVE A HUMAN RESOURCES DEPARTMENT

To understand the dynamics related to the search for new staff, companies were asked if they had a human resources department. It is interesting to note from the responses that approx. only slightly less than 50% of companies claim to have an HR department (however small or multifunctional). In addition to all the many benefits which an HR department can bring to even a small SME, understanding skills gaps in the present workforce and ensuring the recruitment of the necessary talent is fundamental to growth.



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It may be of interest to local TVETs to turn their attention to future courses on HR department creation and skills management of the workforce within the BaCE. Furthermore, it is typically the task of the HR



department to liaise with TVETs in the organization of targeted skills courses for industry.

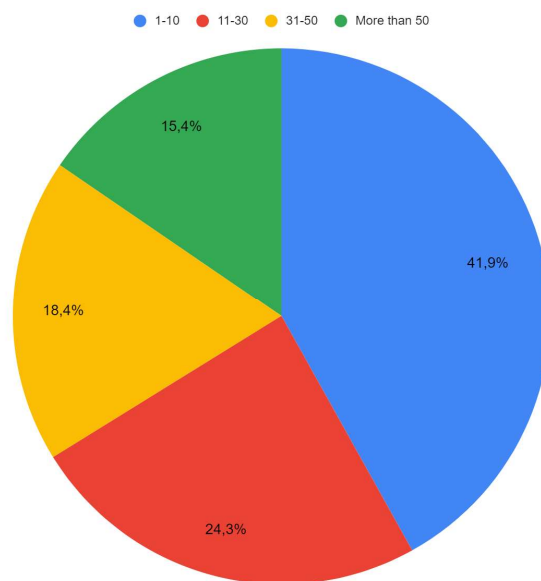
EMPLOYEE PROFILE AND TRAINING

NUMBER OF EMPLOYEES IN COMPANY AND AGE



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As regards criteria for number of employees, the chart below shows that most of the companies interviewed can be defined as micro (42% up to 10 employees), followed by approx. 43% of companies defined as small (up to 50 employees). However, it is also interesting to note that over 15% declared 50 employees or above,



which is one of the EC criteria for medium-sized companies³.

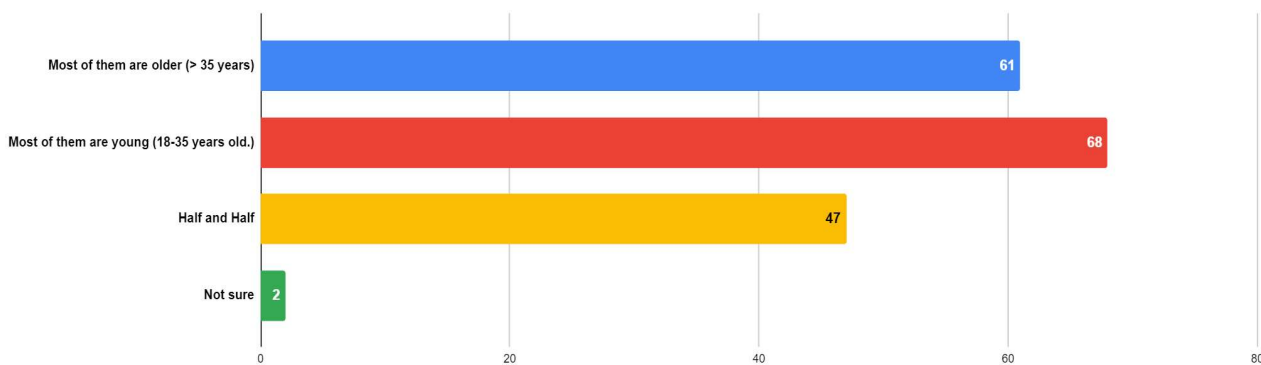
EMPLOYEES UNDER 35

Of extreme interest is the data on age. Nearly 40% of companies declare that most of the staff is young, in the 18-35 age group, and a good number of companies have both under 35 and over 35 staff. On average, we can

³User guide to the SME definition, European Commission, 2020



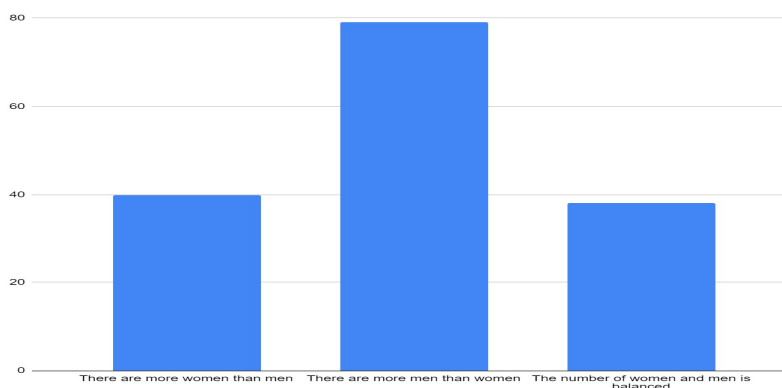
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say that of the 178 companies which provided data on the age composition of the workforce, over 60% have a strong component of young staff. This is good news in terms of adaptability, agility and technical advancement.

GENDER BALANCE

Although exact male-female employment rates are unavailable, the figures regarding gender would seem to reflect our expectations, which were that the fisheries sector is a male-dominated industry, especially in the Mediterranean. However, perhaps also due to a wider range of sectors which participated in the questionnaire, there is also encouraging data. Almost a quarter of the 150+ companies which responded to this question declare that they have a gender-balanced workforce, and a further 25% of so even claimed that





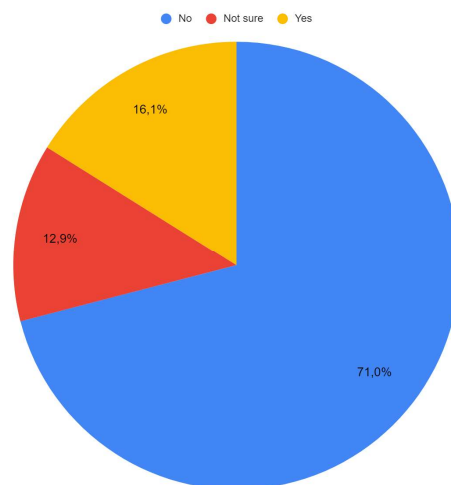
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they employed more women than men.

LEVEL OF EDUCATION OF EMPLOYEES

To understand in detail the level of training of employees, we included a multiple-choice question with a large range of different options. Vocational training was found to be the most widespread category among company employees followed by a bachelor's degree. Some companies indicated a master's degree and vocational training.

SKILLS GAP

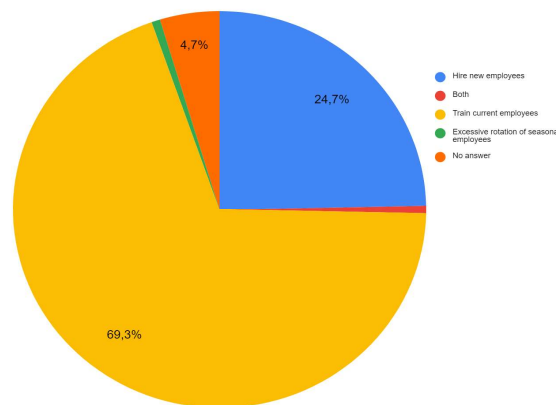


Most companies claim they do not feel skills gaps for activities currently underway.



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Linked to this, a further question was asked regarding the best strategy to improve functioning within companies. Most questionnaire participants believe that training current employees would be the best solution, however, a substantial response (nearly 25%) consider hiring new employees to be the best



solution.

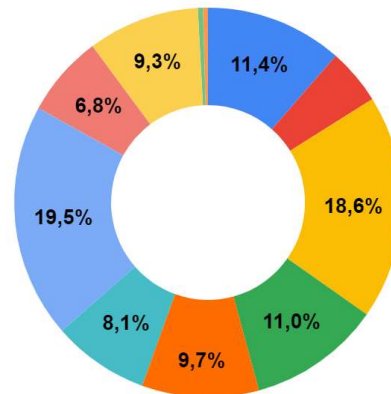
KIND OF TRAINING USEFUL FOR A COMPANY

When asked about what kind of in-house skills development could be most useful to companies, we find training in issues related to life skills, immediately followed by specific technical/professional skills and process innovation to be considered the most useful (20% each). However, it is worth noting that many others also carried substantial and equal weight (IT and equipment, quality and product certification and other specific skills).



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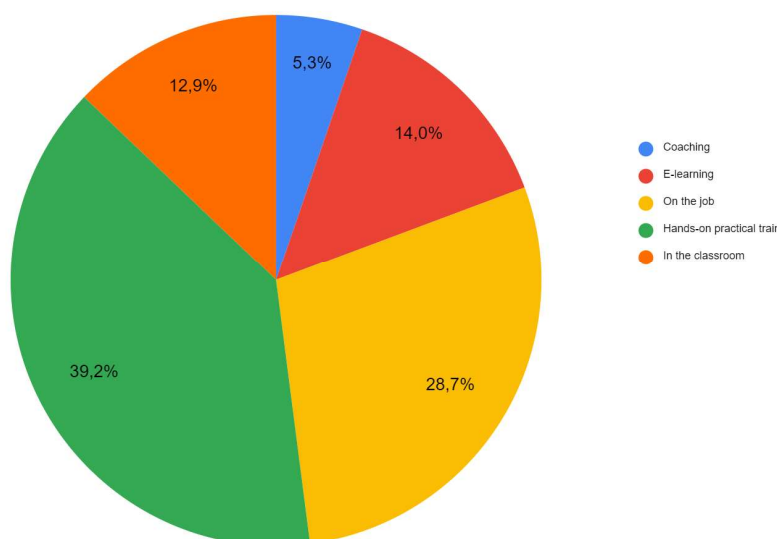
- Certification of quality and product
- Management skills
- Technical/professional skills
- Process innovation
- Technological innovation - IT or equipment training
- Management skills - courses for company managers
- Soft Skills training
- Innovation in processing techniques
- IT or equipment training
- Specialized drivers
- Design



In an attempt to better understand the needs of companies and what type of training would prove effective in training future workers, companies were asked to indicate which type of training they considered most effective. The graph below clearly shows that companies consider practical or on-the-job training most effective.



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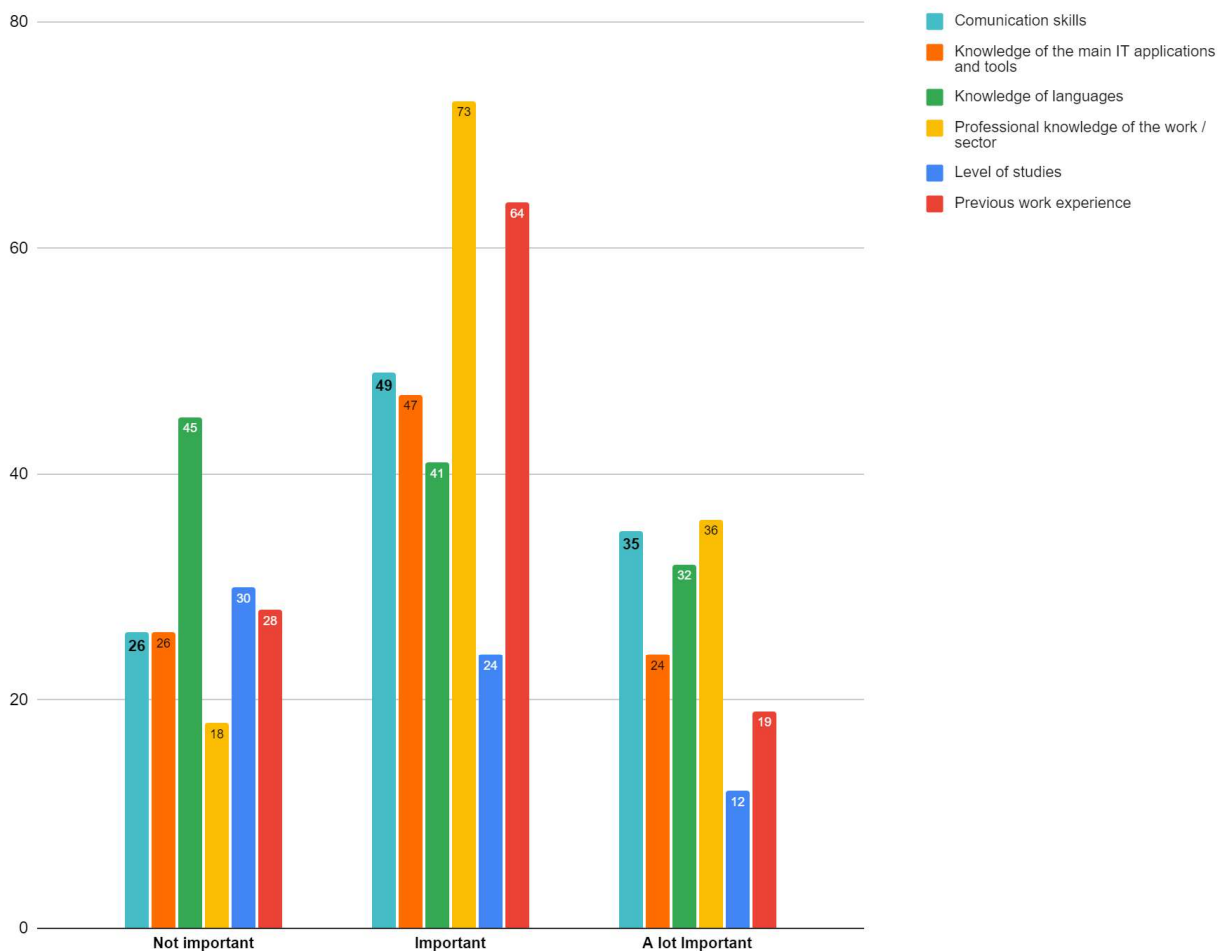


SKILLS

The importance that companies give to specific skills sets produced highly mixed results. Some companies gave considerable importance to specific skills which other companies regarded as having low importance. However, if we can gain any new knowledge from the results, it is that companies seem to agree on the fact that previous work experience and professional knowledge of the sector are important aspects in prospective employees. Knowledge of IT applications and tools is also highly appreciated by employers.



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Among the skills considered most important by companies, we have professional knowledge of work and previous experience gained, followed by communication skills and knowledge of new technologies.

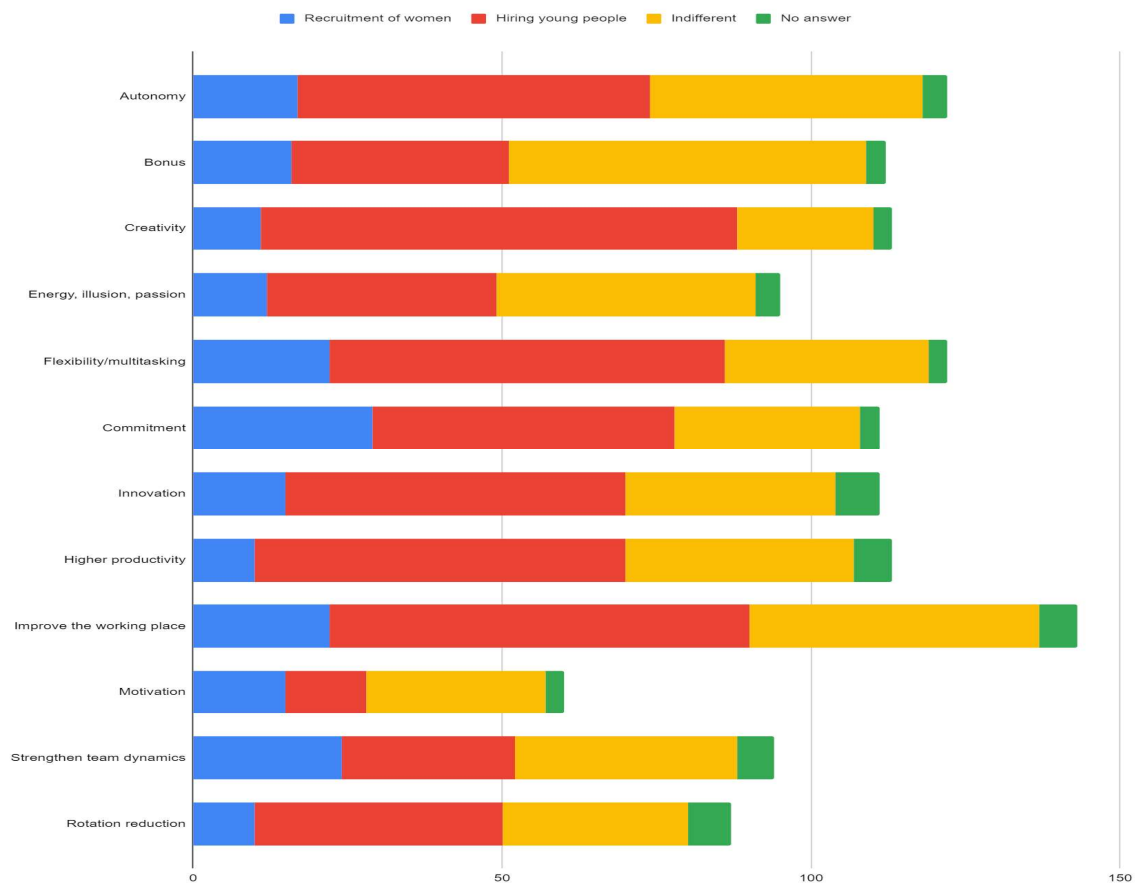
The level of education is not claimed to be a fundamental requirement.



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BENEFIT BY HIRING YOUNG PEOPLE OR WOMEN

A multiple-choice question was asked about the benefits gained by hiring women or young people.



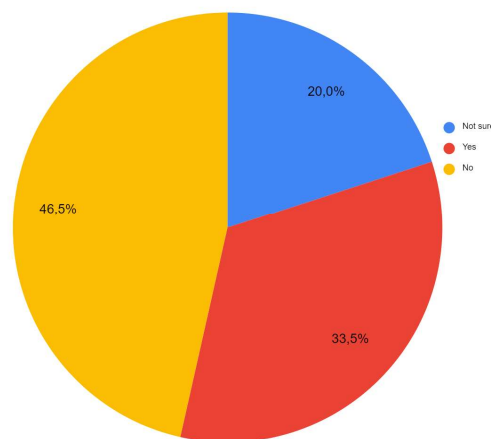


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It is clear that companies are highly motivated in hiring young people or women. Companies consider the main gains to regard improvements in the working environment, commitment, creativity, autonomy and innovation followed by flexibility and productivity.

In general - although companies declare that they do not perceive any gap - it is evident that the qualities sought or the reasons that would compel companies to seek personnel are those linked to a improvements in the working environment and a higher level of innovation.

In an attempt to gauge whether companies were aware of training programmes in their region for NEETs and women, including practical courses, some partners included a question on NEET internships.



Most participants claimed either that there were no programmes, or that they were not sure.

VULNERABLE PEOPLE

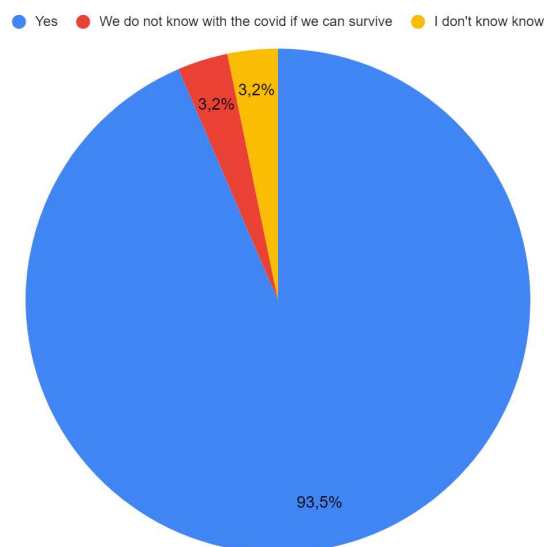


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COMPANY DIRECTION

PLAN TO EXPAND OR DEVELOP COMPANIES

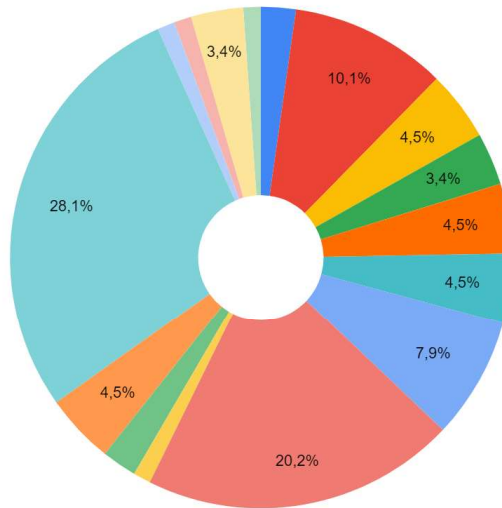
Most companies declared that they intend to expand their business over the next five years; however, they also underline a series of critical issues such as difficulties in accessing financing, difficulties in accessing



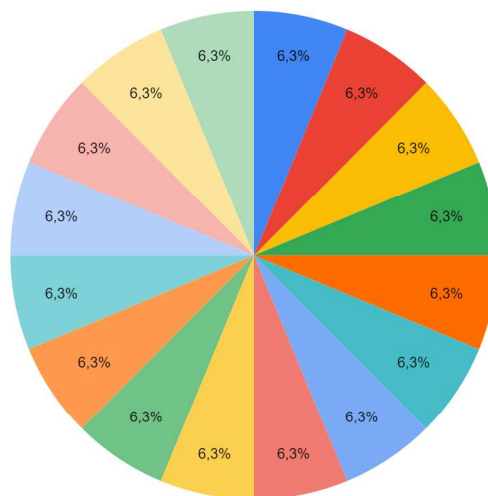
markets and a lack of specialized figures and issues related to bureaucracy and logistics.



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- Difficulty in accessing finance, Logistics, Consequences due to the COVID-19 Pandemic
- Lack of professional figures, Logistics
- No answer
- Difficulty in accessing finance, Logistics, Difficulty in accessing the market, Consequences due to the COVID-19 Pandemic
- Difficulty in accessing finance, Lack of professional figures
- Difficulty in accessing finance, Difficulty in accessing the market
- Lack of professional figures
- Difficulty in accessing finance
- Difficulty in accessing finance, Lack of professional figures, Difficulty in accessing the market, Limits to the supply of materials
- Consequences due to the COVID-19 Pandemic
- Difficulty in accessing the market
- Difficulty in accessing finance, Consequences due to the COVID-19 Pandemic
- Difficulty in accessing finance, Lack of professional figures, Consequences due to the COVID-19 Pandemic
- Long times for the issuing of authorizations by the bodies in charge
- Bureaucracy
- Difficulty in accessing finance, Lack of professional figures, Difficulty in accessing the market



- Increase in the company's promotional activities in the area (also through social channels)
- Creation or strengthening of digital sales channels (also through the activation of new platforms)
- Creation or strengthening of physical sales channels
- Digitization
- The demand for distance learning through digital platforms has increased.
- Staff training and updating
- Technological innovation of production processes
- Integration of new products / services into the Company's offer portfolio
- Introduction of synergies / forms of collaboration / integration with other companies
- Greater internationalization
- Changes to products / services already existing before the crisis
- I don't know / I don't answer
- Postponement of planned investments
- Production conversion
- Reduction of salaries and dividends of management and / or shareholders
- Sustainability of production processes

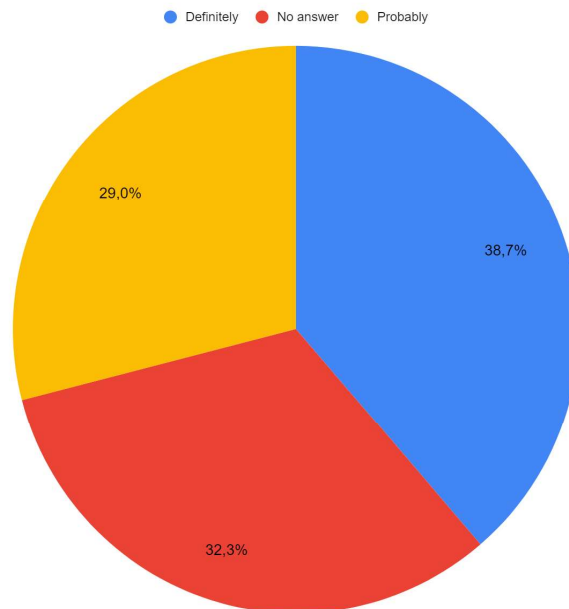


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Although the critical issues encountered are evident and the Covid-19 pandemic has slowed down and, in some cases, stopped the world market, we asked what strategies the companies would adopt to deal with the current emergency. Proposed solutions were varied with many options exploring new markets also through virtual channels and positioning products through e-commerce or the adoption of new technologies. Other aspects concern the product improvement or positioning on the market. Also noteworthy is the training for employees and the sustainability of production processes.

PROCEDURES OF BLUE OR CIRCULAR ECONOMY TO INTRODUCE

Most companies at the end of the questionnaire make it clear that they would implement circular economy



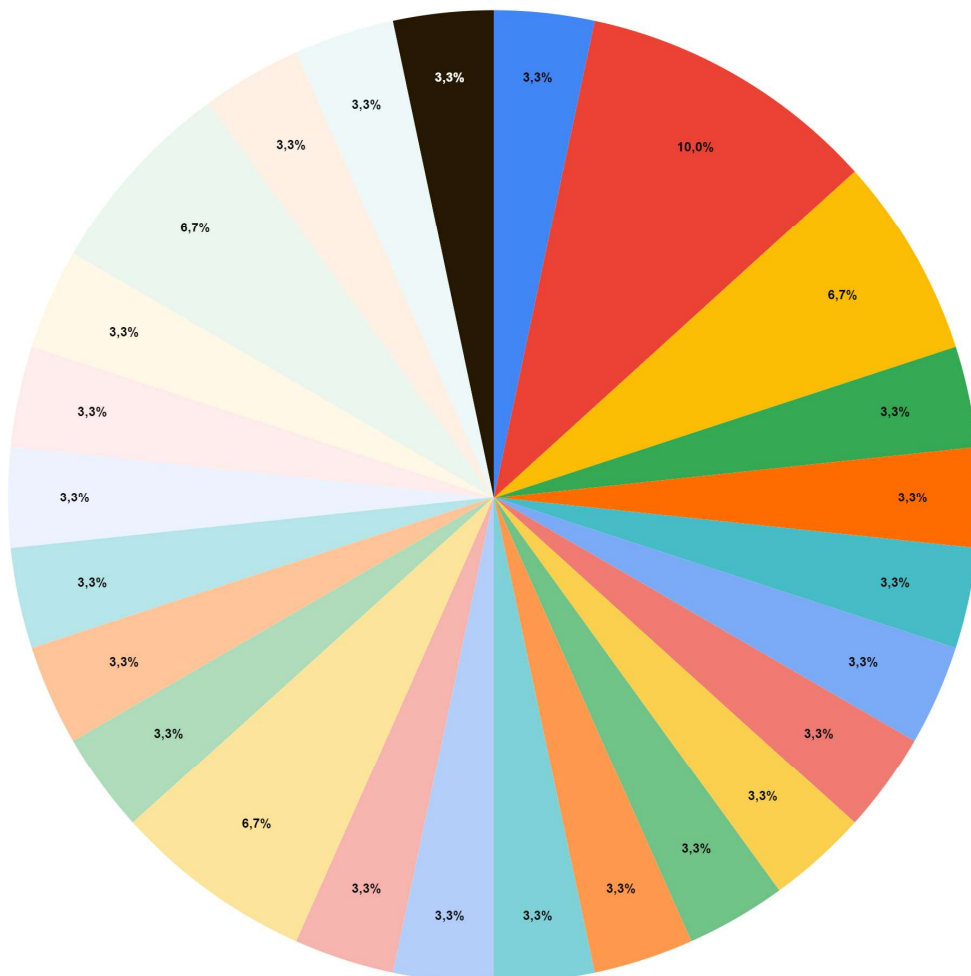
practices or have a strong intention to do so.



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ACTIVITIES OF INTEREST WITHIN THE HELIOS PROJEC

The last question concerns the type of collaboration and the activities that companies are willing to undertake to actively participate in the Helios project. In general, we can say that the companies have responded positively and enthusiastically to all the activities offered.





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The major recurrences concern the sharing of job offers, the willingness to host trainees, and the willingness to assist the experts for the implementation of training and mentoring.

- Involvement of one or more staff members in mentoring activities for students, Participation as a host company / organization for training internships of young people participating in the project,Workshop with other companies / organizations: discussion groups on topics relevant to the sector.
- Sharing of job offers that may be of interest to participants in training courses, Participation as a host company / organization for training internships of young people participating in the project, Support to teachers / trainers involved in the project to improve their knowledge / skills in the reference sector
- Sharing of job offers that may be of interest to participants in training courses, Participation as a host company / organization for training internships of young people participating in the project, Support as experts in curricular content design
- Involvement of one or more staff members in mentoring activities for students, Educational workshops for young people / training pills, Participation as a host company / organization for training internships of young people participating in the project, Support as experts in curricular content design, Support to teachers / trainers involved in the project to improve their knowledge / skills in the reference sector,Workshop with other companies / organizations: discussion groups on topics relevant to the...
- Involvement of one or more staff members in mentoring activities for students, Educational workshops for young people / training pills, Participation as a host company / organization for training internships of young people participating in the project, Support as experts in curricular content design,Workshop with other companies / organizations: discussion groups on topics relevant to the sector.
- Educational workshops for young people / training pills, Support as experts in curricular content design, Support to teachers / trainers involved in the project to improve their knowledge / skills in the reference sector,Workshop with other companies / or...
- Participation as a host company / organization for training internships of young people participating in the project,Workshop with other companies / organizations: discussion groups on topics relevant to the sector.
- Educational workshops for young people / training pills, Support to teachers / trainers involved in the project to improve their knowledge / skills in the reference sector
- Participation as a host company / organization for training internships of young people participating in the project, Support as experts in curricular content design
- Educational workshops for young people / training pills, Participation as a host company / organization for training internships of young people participating in the project, Support to teachers / trainers involved in the project to improve their knowledge / ...
- Sharing of job offers that may be of interest to participants in training courses, Educational workshops for young people / training pills, Participation as a host company / organization for training internships of young people participating in the project
- Sharing of job offers that may be of interest to participants in training courses, Educational workshops for young people / training pills, Participation as a host company / organization for training internships of young people participating in the project, Su...
- Involvement of one or more staff members in mentoring activities for students, Participation as a host company / organization for training internships of young people participating in the project
- No answer
- Involvement of one or more staff members in mentoring activities for students, Sharing of job offers that may be of interest to participants in training courses, Educational workshops for young people / training pills, Participation as a host company / org...
- Participation in workshops, focus groups and webinars
- Sharing of job offers that may be of interest to participants in training courses, Participation as a host company / organization for training internships of young people participating in the project, Support as experts in curricular content design,Workshop...
- Participation as a host company / organization for training internships of young people participating in the project
- Involvement of one or more staff members in mentoring activities for students, Educational workshops for young people / training pills, Support as experts in curricular content design,Workshop with other companies / organizations: discussion groups o...
- Educational workshops for young people / training pills, Participation as a host company / organization for training internships of young people participating in the project,Workshop with other companies / organizations: discussion groups on topics rele...
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- Educational workshops for young people / training pills, Support as experts in curricular content design



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CONCLUSIONS AND IMPLICATIONS FOR THE HELIOS PROJECT

The data collected suggests that the companies interviewed have different needs from the point of view of the skills of the employees, presenting different production sectors and providing different services, with an often national or international perspective.

The companies which participated in the questionnaires came from a good range of sectors from throughout the partner regions, production and services sectors being perhaps the most predominant. This is of interest to Helios as the production sectors will need to adopt circular economy principles into their production cycle in the near future. Overall, there is good awareness of the principles of the BaCE but a definite need for adoption of those principles and skills development in this area.

Most companies declared an interest in skills regarding process innovation, soft skills and specific technical skills. They consider hands-on practical training or training on the job to be most effective. However, the lack of HR departments may impede correct management of the workforce and skills recruitment.

There is a good component of young people in the companies, which will aid future growth and, therefore, expansion of the workforce.

Although companies claim they do not perceive a gap in skills regarding current production activities and consider training of current employees to be the best solution to improve company functioning (only a quarter consider new recruits to be the solution), they *do* recognize a lack of specialized figures as an obstacle to future expansion, in addition to difficulty in accessing financing. Other aspects hindering future growth concern product improvement, training for employees and the sustainability of production processes.

The results show a need to raise awareness of social inclusion issues and the importance of providing opportunities for vulnerable categories of our society.



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