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advanCing youth and women social inclUSion in The mEditorRanean
(C_A.3.1_0014) - WP3 (O.3.2)

Market needs analysis form Italy

ARCES Association (PP1)
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Author:
Simone Marsala

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Introduction

For each Project sector the responsible partner, have to include several information in order to deliver a quantitative and qualitative analysis aimed at providing a sectors needs overview for each partner country.

Project target sectors

Green economy is a system of economic activities connected with the production, distribution, and consumption of goods and services that results in better human wellbeing in the long term to avoid exposing future generations to significant environmental risks and the ecologic shortage.

Circular economy refers to strategies that limit the environmental impact and waste of resources and increase efficiency at all product economy stages.

Blue economy encompasses all industries and sectors related to oceans, seas and coasts, whether they are based directly in the marine environment (e.g. shipping, seafood, energy generation) or on land (e.g. ports, shipyards, coastal infrastructures).

Sustainable agriculture is a type of agriculture that focuses on producing long-term crops and livestock while having minimal effects on the environment, trying at the same time, to find a good balance between the need for food production and the preservation of the ecological system within the environment.

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Market Needs Analysis

Please provide the following information by using both data you collected during the A 3.2.1 – “Sectors Needs Analysis” (targeting Social Economy Actors) and any publication, report, study you may have, produced at country level, as well as opinions, observations, etc. coming from your local stakeholders:

Blue Economy

<p>Skills and competencies young people should have to work within the sector</p>	<p><i>[max 2000 characteres]</i></p> <p>To work in the blue economy sectors and subsectors usually people are required to have specific technical skills and competencies. Moreover who are looking for a high-qualified job in some of the Blue economy-related sectors usually need several years of work-related experience, on-the-job training, and/or vocational training.</p>
<p>Needs of the SMEs operating within the sector</p>	<p>These are the needs of SMEs operating within the sector:</p> <ul style="list-style-type: none"> - Funding opportunities. - Training for young people that are in line with the enterprises' needs. - Support to the employment of young people, in particular from disadvantaged groups. - Guarantee funds for the creation of sustainable enterprises and for technological innovation.
<p>Potential in terms of business development and job creation</p>	<p>Sicily has one of the greatest number of SMEs and enterprises operating in the Blue Economy sector and subsectors compared with other Italian regions. With over 12,300 ships (14.8% of the total), Italy has the largest fleet per Member State. In particular Sicily has the largest commercial fishing fleet in Italy. Moreover, the City of Mazara del Vallo has one of the largest fishing fleets in the Mediterranean Sea consisting of 11,000 fishing vessels with a</p>

	<p>total gross tonnage of 139 thousand tonnes and approximately 25,000 people employed.</p> <p>No. of enterprises in Sicily operating in blue economy: 15,000 SMEs and enterprises (excluding those working in the tourism and sport sector).</p> <p>The sector holds important potential in terms of job creation and GVA (Gross Value Added)</p> <p>These are the recommendations of the EC for Italy and Sicily concerning the ‘Blue Growth’ needs and its potential:</p> <p>Short sea shipping (Incl. Ro-Ro): Plan a port specialisation roadmap to optimise port system development and improve intermodal connections at national level between ports and roads/railways. Incentivise the transfer of cargo flows from road to ships, taking advantage of the ‘Motorways of the Seas’. Lighten bureaucratic procedures in handling goods at seaports.</p> <p>Passenger ferry: services Link the sector with other maritime activities, strengthening intermodality and passengers’ movement from different modes of transport. Guarantee connections with islands by establishing specific agreements between private operators and the state. Identify “intervention priorities” in order to identify which port/facility/intermodal link/etc. should be prioritised within the overall framework of the European corridors.</p> <p>Marine aquaculture: Sicily represent the 25% of the entire aquaculture sector in Italy. Adopt a long-term strategy that encompasses promotional activities for increasing internal demand, strengthens links between research and industry, promotes production diversification and increases production shares addressed to exports. Support research on Bluefin tuna reproduction in captivity.</p>
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	<p>Protection of ecosystems: Continue funding protected areas. Identify new areas that should be protected at national and international levels, through research cooperation projects.</p> <p>Coastal tourism: Maximise the attractiveness of southern destinations by improving infrastructure as well as implementing policies promoting sustainable tourism. Moreover encourage cruise passengers to stay longer in cities of call.</p> <p>Cruise tourism: Develop integrated strategic planning encompassing all possible forms of maritime tourism¹.</p>
<p>Impact of the Covid-19 pandemic on the sector</p>	<p>The COVID-19 pandemic impacted strongly on the tourist income during 2020 and 2021, especially on coastal tourism.</p> <p>Due to the fact that mostly of the jobs in the tourism sector are highly seasonal, the sector was particularly affected by a decrease of employment. This phenomena was particularly evident in those localities that live exclusively from tourism.</p> <p>Cruise tourism and passenger ferry links were also particularly affected by the pandemic and the related restrictions enforced by national and local authorities.</p>

¹Study to support the development of sea-basin cooperation in the Mediterranean, Adriatic and Ionian, and Black Sea Analysis of Blue Growth needs and potential per country, EUNETMAR, 2014.

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<p>Policies adopted concerning the development of the sector</p>	<p>The Region of Sicily has been committed along the decades in the sea and environmental protection, as proven by the establishment of several maritime protected areas across the main island and its archipelagoes, among them the Aegadian Islands archipelago it's considered to be the Europe's most extensive Protected Marina Area.</p> <p>The commitment to maintain the biodiversity and to promote sustainable tourism practices is proven by the actions undertaken by regional and local actors as well as by policies and strict rules approved by regional and national authorities with regard to the costal urbanisation and the land overexploitation. In fact, despite the rising flow of tourist income, the coastline haven't been particularly affected by a massive urbanisation as happened in other island or territories across the Mediterranean sea basin.</p>
<p>Any other observation relating with the sector at the country, regional or Mediterranean level</p>	<p><i>[max 2000 caracteres]</i></p> <p>Blue economy has been growing in the last few years, with strong emphasis on Desalination in the Mediterranean area; fisheries as well have given a lot of job (200.000 direct jobs, 500.000 indirect jobs). This is due to the old link between Italy and the sea; just Sicily produces 1/3 of the Blue economy in Italy.</p>

Green Economy

<p>Skills and competencies young people should have to work within the sector</p>	<p><i>[max 2000 characteres]</i></p> <p>Since the green economy related sectors and subsectors are constantly evolving, young people willing to enter the labour market are more and more required to get a bachelor's degree to get new essential technical competencies and skills to better enter the labour market and to have the chance to get more high-qualified job in these sectors. Moreover, SMEs and enterprises often require to job seekers at least one or two years of training on-the-job. A recognized apprenticeship program may be associated with the most high-qualified occupations.</p>
<p>Needs of the SMEs operating within the sector</p>	<p><i>[max 2000 characteres]</i></p> <p>Eco-entrepreneurs operate in highly specialised and technical industries, and thus, they are in need of equally specialized and technical skills, which tend to be in short supply. Simultaneously, the eco-entrepreneurs themselves may be limited in their skills. This “skill gap” has been verified by start-up firms operating in green niches in Canada, France, and Italy, who highlight difficulties in maintaining relationships with suppliers, customers, and partners due to staff and skill shortage.</p>
<p>Potential in terms of business development and job creation</p>	<p><i>[max 2000 characteres]</i></p> <p>To boost the Sicilian green economy, it is vital to choose local raw materials supplying.</p>



<p>Impact of the Covid-19 pandemic on the sector</p>	<p>The COVID-19 pandemic impacted strongly on the green economy sectors, especially in 2020 and 2021 when many companies, local and national authorities decided to shift funds earmarked for the 'green transition' to the health care system with aim to cope with the pandemic.</p> <p>Further threats are caused by the Ukrainian-Russian war, which leads to great uncertainty in the forecasting scenarios for the coming years, because the economic consequences of the war and the related sanctions to the Russian economy. Sanctions and inflation are particularly affecting Agriculture and the green economy-related sectors, due to the increasing price of the energy and the raw materials.</p>
<p>Policies adopted concerning the development of the sector</p>	<p><i>[max 2000 characteres]</i></p> <p>Sicily has been always involved in the implementation of policies promoting a more environmentally sustainable and economically viable agriculture. In this sense, it is important to coordinate and implement policies and actions funded by the European Agricultural Fund for Rural Development (EAFRD) which supports European policy on rural development.</p>
<p>Any other observation relating with the sector at the country, regional or Mediterranean level</p>	<p><i>[max 2000 characteres]</i></p> <p>Green economy does not have the same potential in the Mediterranean area, at the least it's not perceived as good as Blue Economy, however, especially thanks to EU funds, it has been growing and so has the interest in the sector.</p>

Circular Economy


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<p>Skills and competencies young people should have to work within the sector</p>	<p><i>[max 2000 characteres]</i></p> <p>The circular economy related sectors and subsectors are constantly evolving, thus young people who are willing to enter the labour market and they are more and more required to get a bachelor's degree to get new essential technical competencies and skills to enter the job market and to have the chance to get more high-qualified job in these sectors. Moreover SMEs and enterprises often require to job seekers at least one or two years of training on-the-job. A recognized apprenticeship program may be associated with the most high-qualified occupations.</p>
<p>Needs of the SMEs operating within the sector</p>	<p>New points of emphasis, will include 'broad skills' (also called transversal skills) such as digital and green literacy and problem solving, while also building 'deep skills' more related to specific functionalities or disciplines. Non-repetitive, circular jobs will emphasize skills such as product repair and maintenance or innovating the product design process to improve longevity.</p> <p>As for the other sectors, SMEs operating within the sector mostly need:</p> <ul style="list-style-type: none"> - More and accessible funding opportunities - Training for young people that are in line with the enterprises' needs - Tax reduction - Tax relief for the employment of new people
<p>Potential in terms of business development and job creation</p>	<p><i>[max 2000 characteres]</i></p> <p>The circular economy can tackle inevitable linear risks, such as price volatility, resource scarcity, and the fact that GDP can rise while social inequalities deepen. Due to its geographical position and natural resources, Sicily has a great potential in terms of business opportunities and job creation with regard to the circular economy. Funds provided by the 'National resilience and</p>

	<p>Recovery Plan' who allocate around the 40% of total resources to the southern Italian regions, can represent for Sicily an extraordinary opportunity to invest in the circular economy practices and promote the creation of new business and SMEs, especially operating in recycling sector, as well as the use of green energy.</p>
<p>Impact of the Covid-19 pandemic on the sector</p>	<p><i>[max 2000 characteres]</i> As an integral part of this European strategy, the circular economy is a framework for resilience and regeneration that delivers on multiple policy objectives. Policymakers, CEOs, and other influential individuals are mobilising businesses and governments around the world to join the journey towards achieving a resilient recovery with the circular economy in response to the economic impact of the coronavirus pandemic. The circular economy therefore remains highly relevant to keep in the sights as new sources of growth and economic renewal are considered.</p>
<p>Policies adopted concerning the development of the sector</p>	<p><i>[max 2000 characteres]</i> Sicily has been always involved in the implementation of policies promoting a more environmentally sustainable and economically viable agriculture. In this sense it is important to coordinate and implement policies and actions funded by the European Agricultural Fund for Rural Development (EAFRD) which supports European policy on rural development.</p>
<p>Any other observation relating with the sector at the country, regional or Mediterranean level</p>	<p><i>[max 2000 characteres]</i> Recently circular economy has gained momentum thanks to new realities like Orange Fiber s.r.l. in the Mediterranean area, however it is undervalued, especially when confronted to Blue and Green Economy.</p>

Sustainable Agriculture

<p>Skills and competencies young people should have to work within the sector</p>	<p><i>[max 2000 characteres]</i></p> <p>Unlike in the past, most of these job require a bachelor's degree or a master's degree, but some do not. These are the most required skills by the agri-food companies²</p>  <p>Curricula at universities and training centers must be adapted to the sector needs, adjusting the homologation and recognition of skills and experience.</p>
<p>Needs of the SMEs operating within the sector</p>	<p><i>[max 2000 characteres]</i></p> <p>These are the needs of SMEs operating within the sector:</p> <ul style="list-style-type: none"> - More funding opportunities. - Support to the employment of skilled young people, especially able to work in the agri-food trasformation and bio agriculture sectors. - Guarantee funds for the creation of sustainable enterprises and for technological innovation.

² Skill Needs for Sustainable Agri-Food and Forestry Sectors (I): Assessment through European and National Focus Groups, (Article), Sustainability (e-journal), 2022.

<p>Potential in terms of business development and job creation</p>	<p><i>[max 2000 characteres]</i> Plant-based meat sales hit \$1.4 billion in 2020—a 45 percent increase over 2019. And meat alternatives have plenty of company in the larger plant-based food market, which grew 27 percent in 2020 to reach \$7 billion. Plant-based milk sales, fueled by rising interest in oat milk, continue to dominate with a 20 percent increase that tracked to \$2.5 billion in 2020 retail sales. And the growing plant-based market clearly still has more surprises up its sleeve as new products continue to develop.</p>
<p>Impact of the Covid-19 pandemic on the sector</p>	<p>The COVID-19 pandemic impacted strongly on the green economy sectors, especially in 2020 and 2021 when many companies, local and national authorities decided to shift funds earmarked for the ‘green transition’ to the health care system with aim to cope with the pandemic. Further threats are caused by the Ukrainian-Russian war, which leads to great uncertainty in the forecasting scenarios for the coming years, because the economic consequences of the war and the related sanctions to the Russian economy. Sanctions and inflation are particularly affecting the agriculture sector, due to the increasing price of the energy and the raw materials.</p>
<p>Policies adopted concerning the development of the sector</p>	<p><i>[max 2000 characteres]</i> Sicily has been always involved in the implementation of policies promoting a more environmentally sustainable and economically viable agriculture. In this sense it is important to coordinate and implement policies and actions funded by the European Agricultural Fund for Rural Development (EAFRD) which supports European policy on rural development.</p>
<p>Any other observation relating with the sector at the country, regional or Mediterranean level</p>	<p>Growing interest has come to the sustainable agriculture both for the new kind of economy it’s bringing and thanks to the soil-saving function it can bring.</p>

Results and data of the A 3.2.1 – Sectors Needs Analysis – SEAs profiling

Please provide a general overview of the results and data you collected during the Social Economy Actors profiling, including the most relevant statistics and data charts.

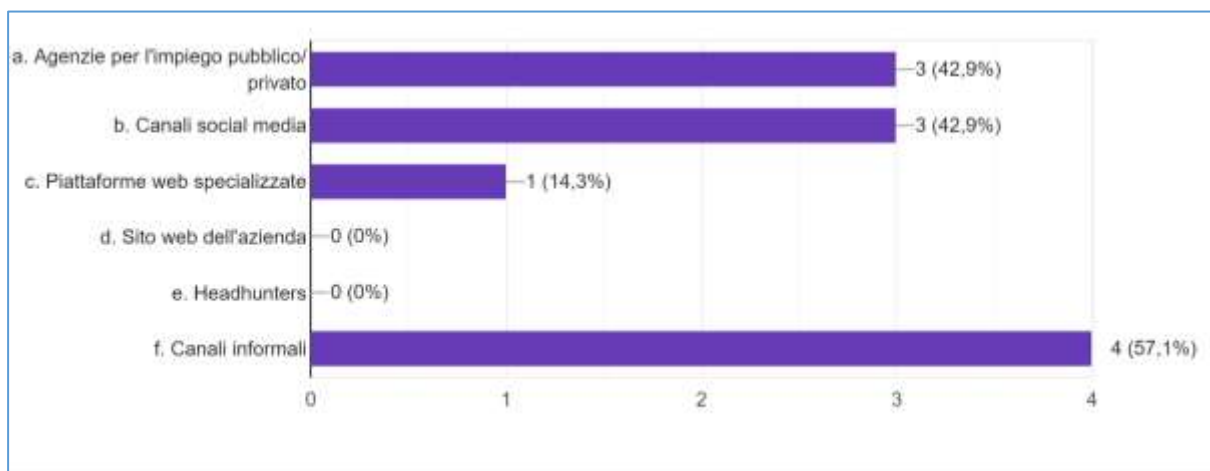


Figure 1: channels are used for staff recruiting

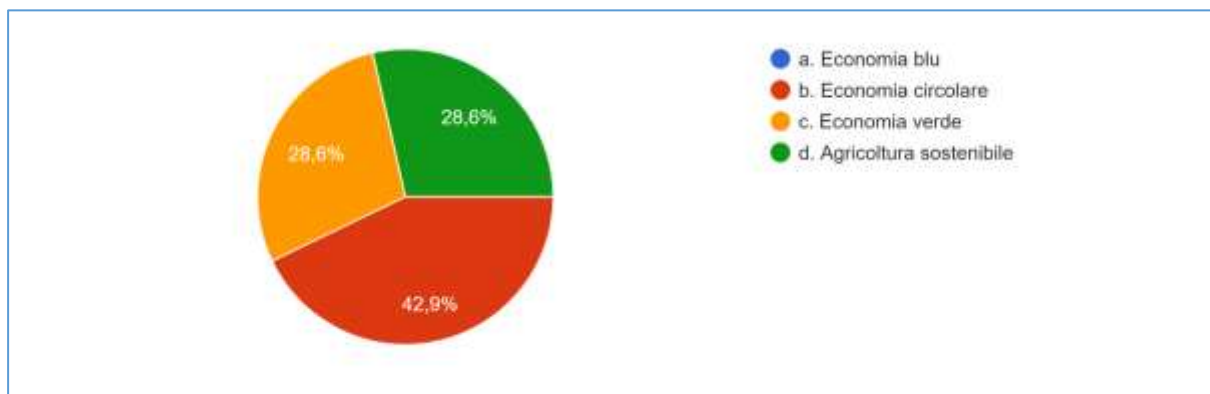


Figure 2: sectors in which enterprises' respondents operate

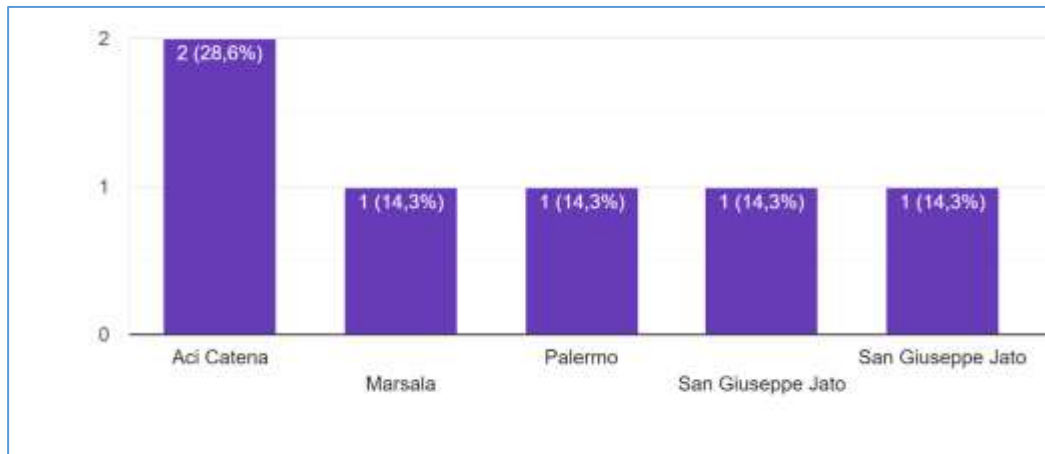


Figure 3: Place where the company/organisation is based

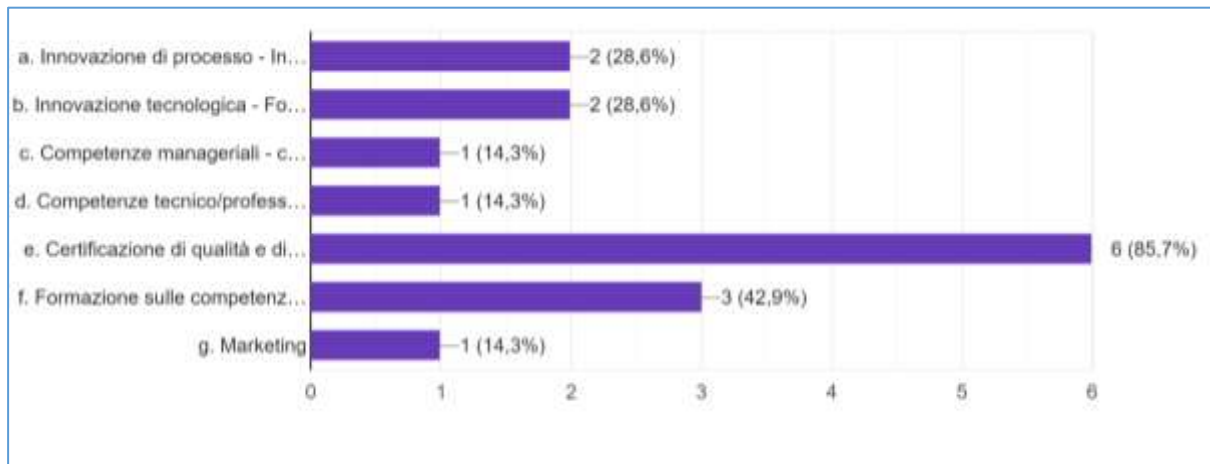


Figure 4: Useful type of training for the companies

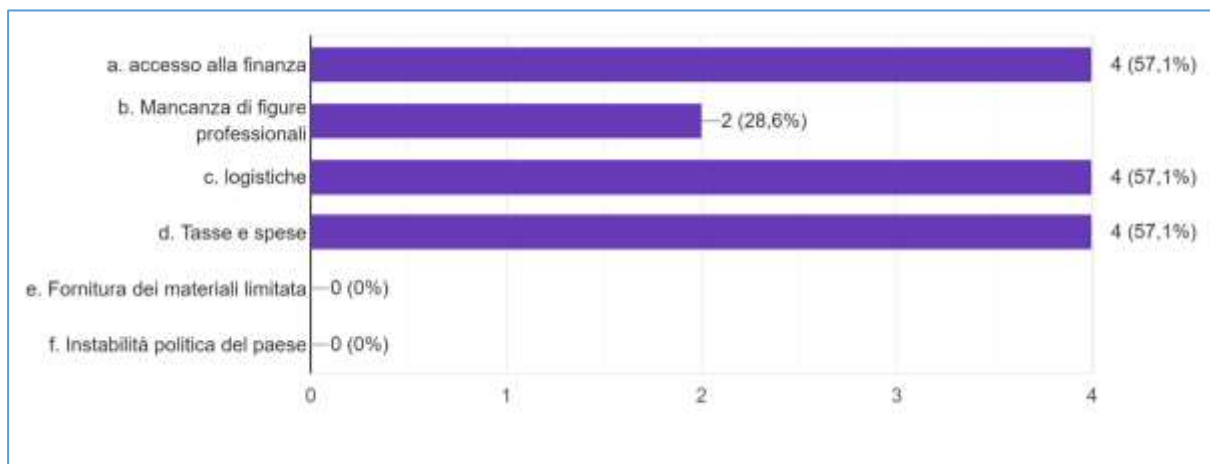


Figure 5: Difficulties might be faced in expanding enterprise's business within the market

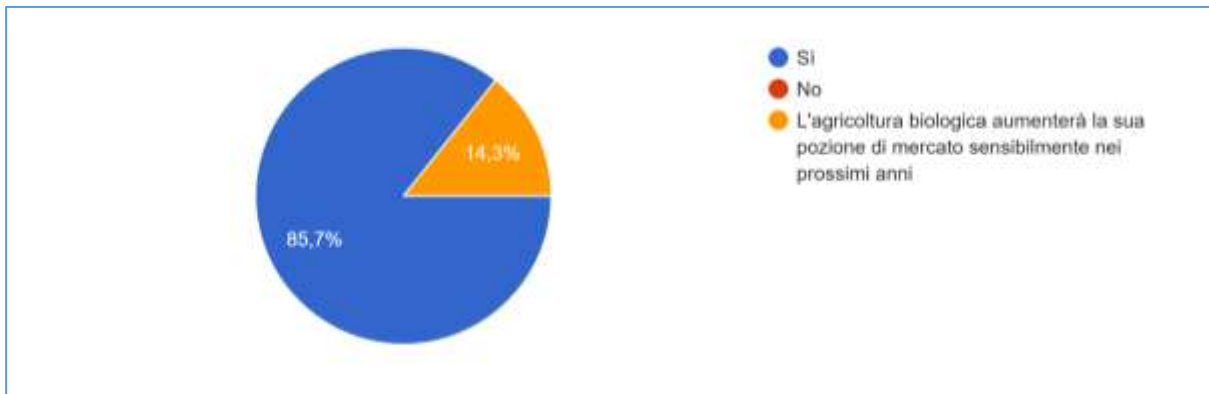


Figure 6: Potential growth of business opportunities within the sector(s) in the next years

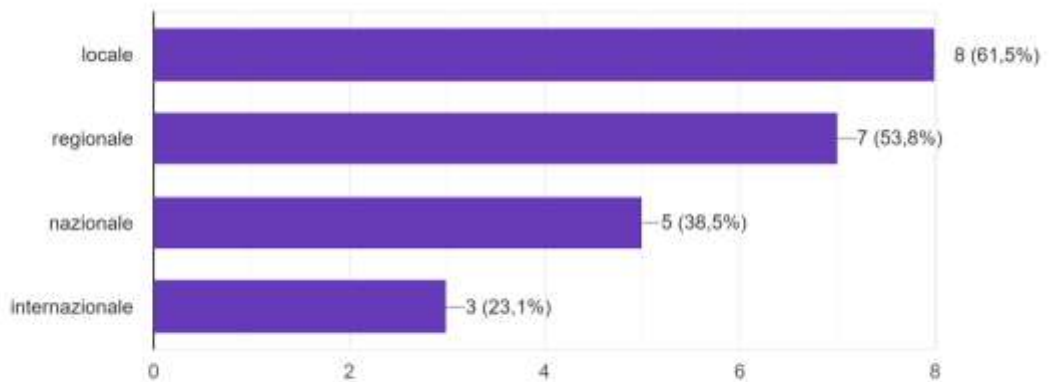


Figure 7: geographical coverage of the social actor's organisation activities (local, regional, national, international)

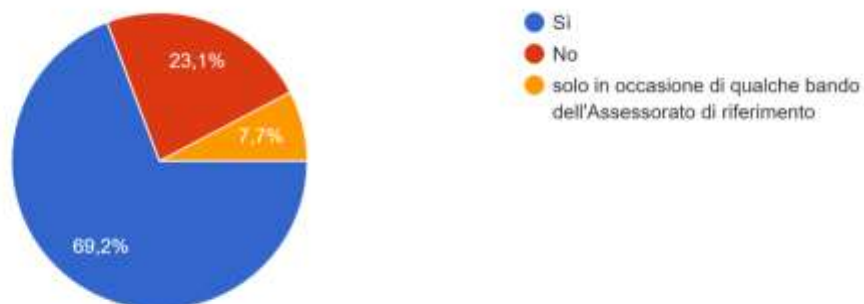


Figure 8: organisation of activities/trainings or publication of job opportunities for NEETs (at least once) by respondent organisations (social actors)



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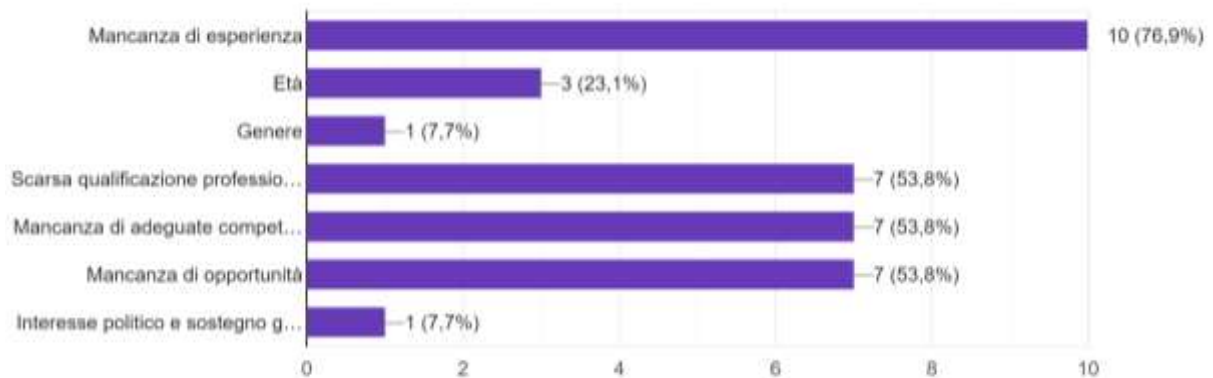


Figure 9: difficulties in finding a job for NEETs and women according respondents' opinion

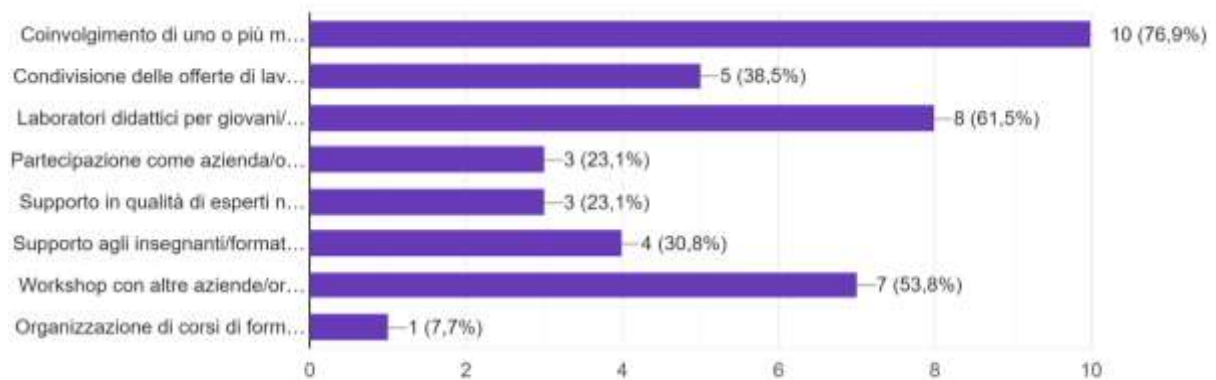


Figure 10: project activities in which respondents organisations would like to be involved in



References

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