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YOUNG PEOPLE IN THE TOURISM INDUSTRY – SITUATION AND CHALLENGES IN GREECE **NATIONAL REPORT**



Project Ref. No. 2017-1-285

The NESET project benefits from a € 1 124 551 grant from Iceland, Liechtenstein and Norway through the EEA and Norway Grants.

The aim of the project is to support on a large-scale transnational basis the sustainability of youth integration in the tourism industry, by creating conditions for NEETs' employment and entrepreneurship in various forms of tourism.

PREFACE

NESET – NEETs' Empowerment for Sustainable Employment in the Tourism sector, is a 3-year project, funded by the EEA and Norway Grants Fund for Youth Employment which aims at supporting on a large-scale transnational basis the sustainability of youth integration in the tourism labour market in the above NESET beneficiary countries (BCs)¹, by creating conditions for NEETs' employment and entrepreneurship in various forms of tourism, incl. alternative tourism.

The initial stage of the NESET project implementation is about making an in-depth investigation of the existing employment and social inclusion opportunities and challenges, faced by young people from a tourism industry perspective. This investigation, together with the competence gap analysis surveys, to be implemented as a next step within the framework of WP3 'Competence gap analysis', will serve the purpose of filling a gap in the systematic mapping of tourism-related training needs of young people in the beneficiary countries.

This National Report presents an overview of the publicly reported challenges, associated with skills' and competences' shortages, faced by young people in the tourism industry in Greece and outlines the need of targeted support for youth empowerment and social integration in tourism. The Report furthermore collects specific baseline outcome indicators' (as defined in the project proposal) values at national level, serving to reaffirm NESET targets and subsequently make credible assessments on project progress and achievements.

The National Report follows the generic structure, proposed by the WP3 Leader – Tora Consult (PP No.9), in order to allow for comparability of reported information and outcomes across NESET partner countries, and includes the following chapters:

- Chapter 1: Skills' shortages, faced by young people in the tourism industry in Greece – challenges and prospects;
- Chapter 2: Existing support for young people's integration in the tourism industry in Greece.

The SARONIS' Team would like to acknowledge the cooperation and contribution of Professor Joseph Hassid and Mr. Nikolaos Vordonis in the preparation of this Report.

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¹ The beneficiary countries, covered by the NESET project activities include Bulgaria, Croatia, Cyprus, Greece, Italy, Portugal and Romania, whereas Iceland is involved in project implementation as an "expert" partner country.

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EXECUTIVE SUMMARY

In its **1st Chapter**, the Report presents and discusses a number of issues referring to the tourism sector's present situation and its development in recent years, with particular emphasis on the labour market's capacity to provide employment opportunities to young people and also to mitigate their employment vulnerability. The analysis shows that in the last 10 years, the Greek economy has undergone a dramatic shrinking, resulting, among others, to substantial cumulative divergence from other European countries. Youth unemployment rate is at 43.7% (January 2018), compared to EU corresponding rate of 16.1%. At the end of 2016, the rate for Greek NEETs in the "young adults" age group, was 30.5% compared to 18.3% in EU28.

The tourism sector's performance has been considerably better than in the rest of the economy. The sector recorded, at the end of 2017, the highest employment since 2008 (400.000). The share of the 25-29 yrs. age group almost doubled between 2008 and 2017. Various relevant indicators seem to suggest that tourism is, from several points of view, a sector offering employment opportunities to groups whose access to the labor market is considered to be relatively difficult. Employment in the Greek Tourism sector is expected to continue to increase. Job opportunities will however continue being closely related to the seasonal pattern of tourism activity in the country.

Concerning NEETs, in the economy as a whole and in the tourism sector in particular, there is a very noticeable scarcity of comprehensive statistics and analyses. A relevant issue that needs to be considered is whether "vulnerability of young people in the tourism sector" should be assessed in terms of how easy may or may not be for a young person to get a temporary job in the specific sector's labour market, only to lose it after a few months! The Report argues that mitigation of young persons' employment vulnerability and sustainable labour market integration may only be ensured in parallel with expansion of tourism activities' offers (i.e. development of non-traditional types and reduced reliance on seasonal tourism), which may lead to increased retention rates of young employees and longer term tourist enterprises' strategies concerning skills development programmes. At the same time, young people interested in tourism related careers, will themselves be encouraged to "invest" in developing their own skills.

In the Report's **2nd Chapter** and in the context of a summary presentation of policies and practices for tourism related skills enhancement policies and programmes, the Report recognises that the promotion of VET for the tourism sector is considered to constitute top priority in all National and Regional Development Plans designed and implemented in Greece. Funding opportunities are intensively publicised, while the eligible organisations' response, the number of submitted Applications for funding and the approval rate of such Applications are all quite high.

Parallel to ad hoc training programmes' implementation, there is an entire tourism related training "system", structured at various levels. This multilevel "system" structure and the

training programmes' design and implementation do not however contribute to overall efficiency! Structural and organisational aspects impact negatively on the "system's" effectiveness in mitigating young persons' employment vulnerability. For a young person, getting a job in a tourism enterprise during "peak activity" seasons may be relatively easy, but discontinuities in employment do not contribute to sustainable integration in the labour market. As already suggested, this may be achieved in parallel with the sector's efforts to develop tourism patterns associated with enterprises operating during longer periods during the year and retention of their employees. This will also encourage, both employers and employees, to invest in "skills-strengthening" and "skills-diversification" processes, benefiting overall competitiveness, at personal, enterprise and sectoral level.

In the last section of the Report, it was attempted to estimate and present a number of "baseline outcome indicators", serving, not only as an overview of NEETs' position in the tourism sector, especially regarding their integration in the labour market and in programmes aiming at enhancing their skills, but also providing reference points for assessing future developments. It is argued that the estimation techniques to be used, the reliability of indicators estimated and their comparability over time or between different countries, is seriously constrained by the fact that available statistical data, national and/or international, are not, referring to detailed target groups as the indicators' definition would require. Estimates presented in this Report (section 2.2) are therefore tentative and provisional and may be revised, at a later stage.

The Report, in its **Concluding remarks**, notes the following:

- Tourism sector has historically been one of paramount importance for the Greek economy. It accounts for a significant share of GDP and is a major employer. Because of the geographical dispersion of tourism enterprises, it also contributes to most regions' economies, thus allowing for socioeconomic regional disparities' mitigation.
- In recent periods of widespread economic crisis, the sector has performed much better than the rest of the economy and its activity recently reached record levels.
- The structural feature characterising tourism activity in Greece is its pronounced seasonal pattern, with a large part of activity concentrated in a relatively short part of the year. Successive programmes aiming at changing this have not been sufficiently successful. This has serious implications on the structure of demand for labour, on the not adequately diversified tourism offers and, as a result, on the enterprises and prospective tourism employees' incentives to invest in skills development programmes.
- Public and private sector initiated training programmes are many and resources absorption is substantial. Their design and overall structure are not however considered to be sufficiently effective, as they mostly perpetuate long established patterns of basic skills, instead of promoting skills that would be required by more modern types of tourism, in which Greece could claim a competitive advantage.

EXECUTIVE SUMMARY IN GREEK – ΕΠΙΤΕΛΙΚΗ ΣΥΝΟΨΗ

Στο **1^ο Κεφάλαιο** της, η Έκθεση παρουσιάζει και αναλύει μια σειρά θεμάτων που αφορούν στη σημερινή κατάσταση του Τουριστικού τομέα και τις πρόσφατες εξελίξεις σε αυτόν, με ειδική αναφορά στην ικανότητα της αγοράς εργασίας να προσφέρει ευκαιρίες απασχόλησης σε νέους και να αμβλύνει το «ευάλωτο» της επαγγελματικής τους κατάστασης. Η σχετική ανάλυση δείχνει ότι, τα τελευταία 10 χρόνια, η Ελληνική οικονομία υπέστη μια δραματική συρρίκνωση, η οποία, μεταξύ άλλων, είχε, ως αποτέλεσμα, την σωρευτική απόκλιση της από τις υπόλοιπες Ευρωπαϊκές χώρες. Η ανεργία των νέων στην Ελλάδα εκτιμάται (Ιανουάριος 2018) σε 43.7%, σε σύγκριση με αντίστοιχο ποσοστό 16.1% στην Ευρωπαϊκή Ένωση. Στα τέλη του 2016, το ποσοστό των Ελλήνων «νεαρών ενηλίκων NEET» (άτομα που δεν απασχολούνται, ενώ, ταυτόχρονα, δεν συμμετέχουν σε εκπαιδευτικά προγράμματα ή σε προγράμματα κατάρτισης), ήταν 30.5%, σε σύγκριση με μέσο ποσοστό 18.3% για το σύνολο των 28 κρατών-μελών της ΕΕ.

Οι επιδόσεις του Τουριστικού τομέα ήταν, στην περίοδο αυτή, σημαντικά υψηλότερες από αυτές της υπόλοιπης οικονομίας. Ο τομέας κατέγραψε, στο τέλος του 2017, το υψηλότερο επίπεδο απασχόλησης μετά το 2008 (400.000 άτομα). Διάφοροι Δείκτες συγκλίνουν στην εκτίμηση ότι, από πολλές απόψεις, ο Τουρισμός προσφέρει ευκαιρίες απασχόλησης σε ομάδες των οποίων η πρόσβαση στην αγορά εργασίας είναι, σχετικά, δυσχερής. Η απασχόληση στον Τουρισμό αναμένεται ότι θα συνεχίσει να αυξάνεται. Οι ευκαιρίες απασχόλησης θα συνεχίσουν ωστόσο να εξαρτώνται από το «εποχιακό πρότυπο» της τουριστικής δραστηριότητας στην Ελλάδα.

Σχετικά με τα άτομα NEET, στην οικονομία συνολικά και στον τουριστικό της τομέα ειδικότερα, παρατηρείται μια αξιοσημείωτη απουσία λεπτομερών στατιστικών στοιχείων και αναλύσεων. Ένα σχετικό θέμα που θα πρέπει να απασχολήσει είναι το κατά πόσον, «το ευάλωτο της απασχόλησής τους στον τουριστικό τομέα» θα πρέπει να αξιολογηθεί μέσω της ευκολίας ή, αντίθετα, μέσω της αδυναμίας εξασφάλισης κάποιας προσωρινής θέσης εργασίας, η οποία όμως χάνεται μετά από μερικούς μήνες. Η Έκθεση υποστηρίζει ότι αυτό το «ευάλωτο της απασχόλησης» και, ως αποτέλεσμα, η βιώσιμη ένταξη των ατόμων αυτών στη σχετική αγορά εργασίας, θα μπορέσει να εξασφαλιστεί μόνο σε παραλληλισμό με την διεύρυνση και την διαφοροποίηση της τουριστικής δραστηριότητας (π.χ. με επέκταση της προσφοράς μη-παραδοσιακών τουριστικών «προϊόντων» και με άμβλυνση της εξάρτησης από τον εποχιακό τουρισμό). Αυτό θα ήταν δυνατό να οδηγήσει σε αυξημένα ποσοστά διατήρησης των νέων εργαζομένων σε θέσεις εργασίας και σε μακροπρόθεσμες στρατηγικές των τουριστικών επιχειρήσεων για την ανάπτυξη των δεξιοτήτων του ανθρώπινου δυναμικού τους. Ταυτόχρονα, οι νέοι που ενδιαφέρονται για επαγγελματική καριέρα στον τουρισμό, θα ενθαρρύνονταν και αυτοί να «επενδύσουν» στην ανάπτυξη των δεξιοτήτων τους.

Στο **2^ο Κεφάλαιο**, στο πλαίσιο μιας, περιληπτικής έστω, παρουσίασης της πολιτικής και των πρακτικών που εκφράζονται μέσω προγραμμάτων αναβάθμισης δεξιοτήτων που αφορούν

τον τουριστικό τομέα, η Έκθεση αναγνωρίζει ότι η προώθηση της Επαγγελματικής Εκπαίδευσης και Κατάρτισης στον Τουρισμό αποτελεί, διαχρονικά, βασική προτεραιότητα κατά τον σχεδιασμό και την υλοποίηση Εθνικών και Περιφερειακών Αναπτυξιακών Προγραμμάτων. Εφαρμόζονται διαδικασίες ευρείας δημοσιότητας για ευκαιρίες χρηματοδότησης και υπάρχει, αντίστοιχα, αυξημένη ανταπόκριση των επιλέξιμων φορέων, ενώ και το ποσοστό εγκρίσεων των σχετικών προτάσεων είναι υψηλό.

Πάντως, παράλληλα με την υλοποίηση συγκεκριμένων προγραμμάτων, λειτουργεί και ένα ολόκληρο «σύστημα» τουριστικής εκπαίδευσης, δομημένο σε διάφορα επίπεδα. Η δομή ωστόσο του πολυεπίπεδου αυτού συστήματος, καθώς και το περιεχόμενο των προγραμμάτων και η οργάνωση της υλοποίησής τους, επιδρά μάλλον αρνητικά στην αποδοτικότητά του και στην επιτυχία του, όσον αφορά στην άμβλυνση του «ευάλωτου» της απασχόλησης των νέων. Για κάποιον νέο, το να βρει εργασία σε κάποια τουριστική επιχείρηση στην περίοδο «αιχμής» της τουριστικής περιόδου, είναι πιθανώς εύκολο, αλλά οι συχνές διακοπές στην απασχόλησή του, δεν συμβάλλει στην βιώσιμη ένταξή του στην αγορά εργασίας. Όπως ήδη αναφέρθηκε, αυτό θα μπορούσε να εξασφαλιστεί παράλληλα προς τις προσπάθειες του τομέα να παραταθεί η περίοδος λειτουργίας των επιχειρήσεων στη διάρκεια του έτους, με επακόλουθη διατήρηση των εργαζομένων στις θέσεις τους. Αυτό θα ενθαρρύνει επίσης εργοδότες και εργαζόμενους, να επενδύσουν σε διαδικασίες «ενδυνάμωσης» και «διαφοροποίησης δεξιοτήτων», εξέλιξη που θα ωφελήσει γενικά την ανταγωνιστικότητα, σε προσωπικό, επιχειρηματικό και κλαδικό επίπεδο.

Στην τελευταία ενότητα της Έκθεσης, έγινε προσπάθεια να εκτιμηθούν και να παρουσιαστούν μια σειρά από «Δείκτες Αναφοράς Αποτελεσμάτων», που θα εξυπηρετούσαν, όχι μόνο την γενική αποτύπωση της θέσης των ατόμων NEET στον τομέα του Τουρισμού, ιδιαίτερα μάλιστα όσον αφορά τον βαθμό ένταξής τους στην αγορά εργασίας και σε προγράμματα αναβάθμισης των δεξιοτήτων τους, αλλά θα προσέφεραν, ταυτόχρονα, και μια βάση αναφοράς για την αξιολόγηση μελλοντικών εξελίξεων. Η Έκθεση υποστηρίζει ότι οι μέθοδοι εκτιμήσεων που χρησιμοποιούνται, η αξιοπιστία των εκτιμώμενων δεικτών και η συγκρισιμότητά τους, διακρατικά και διαχρονικά, περιορίζονται σημαντικά από το γεγονός ότι δεν υπάρχουν διαθέσιμα (εθνικά ή/και διεθνή) στατιστικά στοιχεία, τα οποία αναφέρονται, με την απαιτούμενη λεπτομέρεια, στις ομάδες-στόχους. Κατά συνέπεια, οι εκτιμήσεις Δεικτών που παρουσιάζονται (ενότητα 2.2) είναι ενδεικτικές και προσωρινές και μπορεί να αναθεωρηθούν σε επόμενη φάση.

Στις **Συμπερασματικές Παρατηρήσεις** της, η Έκθεση αναφέρει τα εξής:

- Ο τομέας του Τουρισμού είναι, ιστορικά, ένας από τους τομείς ιδιαίτερης σημασίας για την Ελληνική οικονομία. Του αναλογεί ένα σημαντικό μερίδιο του ΑΕΠ και είναι από τους μεγαλύτερους εργοδότες. Εξ' αιτίας της γεωγραφικής διασποράς των τουριστικών επιχειρήσεων, συμβάλλει επίσης στην άμβλυνση των κοινωνικοοικονομικών ανισοτήτων μεταξύ περιφερειών.
- Στην διάρκεια της πρόσφατης περιόδου γενικής οικονομικής κρίσης, οι επιδόσεις του τομέα ήταν ανώτερες, σε σχέση με την υπόλοιπη οικονομία και η δραστηριότητά του έφθασε πρόσφατα σε επίπεδα ρεκόρ.

- Το διαρθρωτικό στοιχείο που χαρακτηρίζει την τουριστική δραστηριότητα στην Ελλάδα, είναι αυτό της έντονης εποχικότητας, με ένα μεγάλο μέρος της δραστηριότητας να συγκεντρώνεται σε σχετικά μικρό τμήμα του έτους. Διάφορες προσπάθειες με τις οποίες επιδιώχθηκε να μεταβληθεί το εποχιακό αυτό πρότυπο, δεν ήταν ιδιαίτερα επιτυχείς. Το γεγονός αυτό έχει σοβαρές επιπτώσεις στην διάρθρωση της ζήτησης για εργαζόμενους στον τουρισμό, στην ανεπαρκή διαφοροποίηση του τουριστικού «προϊόντος» και, ως συνέπεια, στο ενδιαφέρον, επιχειρήσεων και μελλοντικών εργαζομένων σ' αυτές, για «επενδύσεις» σε προγράμματα ανάπτυξης, εμβάθυνσης και διαφοροποίησης δεξιοτήτων.
- Υπάρχει μεγάλος αριθμός εκπαιδευτικών προγραμμάτων τουριστικής εκπαίδευσης και κατάρτισης, τόσο από τον δημόσιο, όσο και από τον ιδιωτικό τομέα και οι πόροι που έχουν αναλωθεί, προς την κατεύθυνση αυτή, είναι σημαντικοί. Ο σχεδιασμός, ωστόσο, και η δομή τους δεν εξασφάλισε την απαιτούμενη αποδοτικότητα, δεδομένου ότι αυτές αφορούσαν, κυρίως, σε κλασικές, καθιερωμένες δεξιότητες, αντί άλλων, πιο σύγχρονων, που οι σύγχρονες τουριστικές δραστηριότητες απαιτούν, δραστηριότητες μάλιστα στις οποίες η Ελλάδα θα μπορούσε να διεκδικήσει ανταγωνιστικό πλεονέκτημα.

INTRODUCTION

As already indicated in its Preface, this National Report presents an overview of challenges, associated with skills' and competences' shortages, faced by young people in the tourism industry in Greece and outlines the need of targeted support for youth empowerment and social integration in tourism.

The Reports structure is the following:

In the **1st Chapter** we present and shortly discuss the general trends in the country's labour market and its tourism sector in particular. A special issue discussed is the key challenges faced by young people resulting from their employment vulnerability.

In its **2nd Chapter** the Report describes the existing support framework for young people's integration in the Greek tourism industry. A special topic dealt with is the attempt for an estimation (at national level) and presentation of a number of "baseline outcome indicators", which could, under certain conditions, serve to reaffirm NESET targets and subsequently allow credible assessments of project's progress and achievements.

Several sources, mostly national ones, have been used for the preparation of this Report. Besides previous works (published and unpublished), which provided the background knowledge of the sector's specifics, a valuable source of statistical data and sector-specific analyses, were the numerous studies and surveys' reports published by the Institute of the Tourism Enterprises' Association (INSETE).

1. SKILLS' SHORTAGES FACED BY YOUNG PEOPLE IN THE TOURISM INDUSTRY IN GREECE

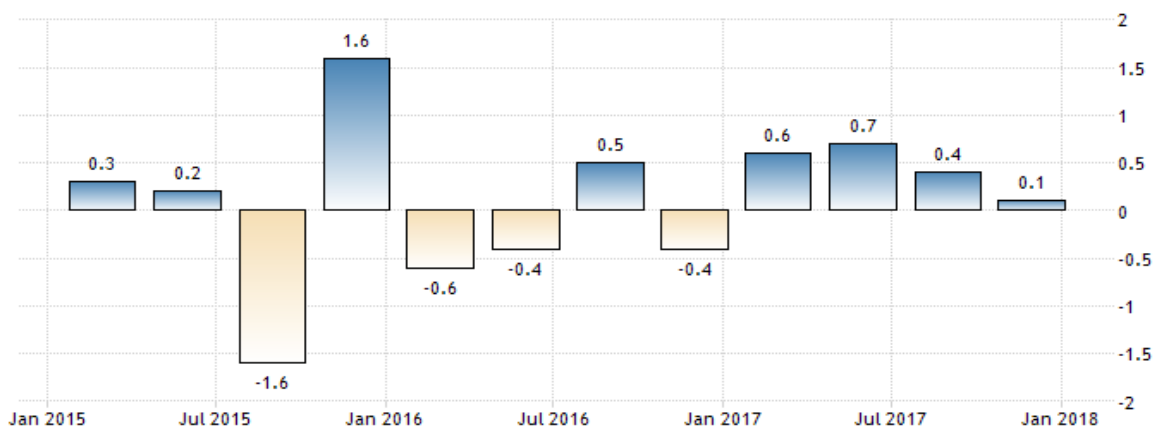
Key findings of Chapter 1:

- In the last 10 years, the Greek economy has undergone a dramatic shrinking, resulting, among others, to substantial cumulative divergence from other European countries. Youth unemployment rate at 43.7% (January 2018), compared to EU corresponding rate of 16.1%.
- At the end of 2016, the rate for Greek NEETs in the “young adults” age group, was 30.5% compared with 18.3% in EU28.
- In the **tourism sector** developments have been considerably better than in the rest of the economy. Tourism, recorded, at the end of 2017, the highest employment since 2008 (400.000). The share of the 25-29 yrs. age group almost doubled between 2008 and 2017.
- Tourism seems to be a sector offering employment opportunities to groups whose access to the labor market. Employment in the Tourism sector is expected to continue to increase. Job opportunities will continue being related to the seasonal pattern of tourism activity.
- Concerning NEETs, there is a very noticeable scarcity of comprehensive statistics and analyses.
- A relevant issue that needs to be considered is whether “vulnerability of young people in the tourism sector” should be interpreted and assessed in terms of how easy may or may not be for a young person to get a temporary job in the specific sector's labour market, only to lose it after a few months?

1.1. Young people in the labour market – general trends and tourism industry specifics

In the last 10 years, the Greek economy has undergone a dramatic shrinking, resulting, among others, to substantial cumulative divergence from other European countries. GDP has been consistently decreasing since 2008. These developments have affected, in varying degree, all economic sectors and were obviously reflected in all basic economic magnitudes' evolution.

GDP Growth Rate - Greece



Youth Employment has also been seriously affected! One source, focusing on young people between 15 and 24 years old, reports Greece's youth unemployment rate at 43.7% (January 2018), compared to EU corresponding rate of 16.1%. Other comparable rates for 2nd and 3rd worst performing EU member states, are: Spain: 36%, Italy: 31.5%. (Source: www.statista.com).

European Union Youth Unemployment rate



Youth Unemployment rate - Greece



Source: www.tradingeconomics.com

Focusing on people defined as NEETs ("Not in Employment, Education or Training"), the country's situation, for those aged between 20 and 34 years, is again indicative of the distance

that has developed over time between Greece and its EU partners. In particular, at the end of 2016, the rate for Greek NEETs in the above age group, was 30.5% (males: 24.3%, females: 36.9%) compared with 18.3%, 14.0% and 22.7% respectively in EU28. Comparable figures for Spain are: 22.8%, 20.4% and 25.3% and those for Italy: 30.7%, 25.7% and 35.8%. (Source: EUROSTAT).

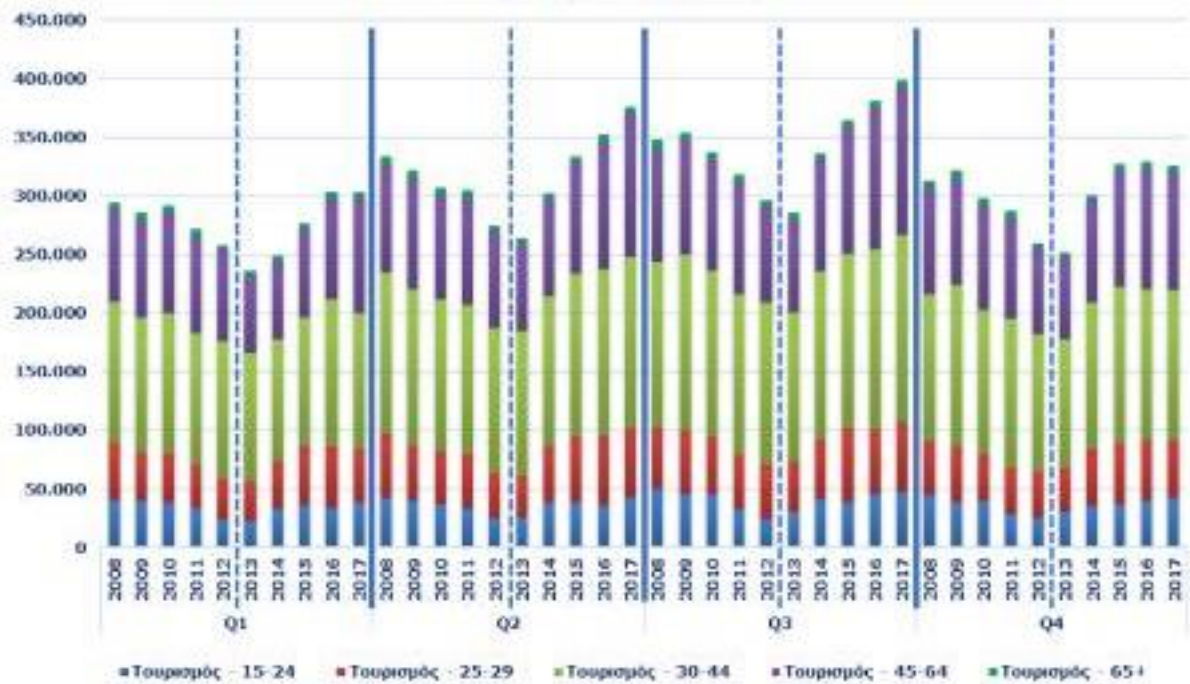


In the **tourism sector** however, developments have been considerably better than in the rest of the economy. For a sector which contributes more than 10% to the economy's GDP (and to at least double this percentage, if its indirect contribution is also taken into account), the fact that its annual growth rate of employment between 2008 and 2017, was +0.9%, compared to -2.5% for the rest of activity sectors, is certainly worth noting! In contrast to other sectors, Tourism, recorded, at the end of 2017, the highest employment since 2008 (400.000), exceeding its previous record level of 380.000 in 2016. This is explained by the fact that recovery after 2014 overcompensated for losses during the 2008-2013 period. At the end of 2017, tourism accounted for 10.4% of total employment, having increased this share from 7.5% in 2008 and 8.1% in 2012. The evolution of tourism activity in Greece (period 2008-2017) and its characteristic "seasonal pattern" is shown on the Graph below.

Regarding the age composition of total employment, data suggest that the share of the 25-29 yrs. and 45-64 yrs. age groups almost doubled between 2008 (Q3) and 2017 (Q3), from 14.8% and 27.9% in 2008 respectively, to 15.2% and 31.8% in 2017. The opposite was the case with the 30-44 yrs. age group, whose share declined from 40.8% to 39.9% during that same period.

Tourism seems to be a sector offering employment opportunities to groups whose access to the labor market, in general, is considered to be relatively more difficult, i.e. to young persons and to those above 55 years!

Age structure of employment in the tourism sector, 2008 – 2017, Quarterly data



1.2. The vulnerability of young people in the tourism sector in Greece – key challenges

The disadvantaged situation of young people in the Greek labour market, especially in periods of economic crisis, may be attributed to the cumulative effect of several factors. Demand and supply of labour and imbalances between these two sets of forces, may offer partial, at least, explanation of the situation. Although the already acquired and somehow certified skills of those seeking employment is always a crucial consideration, it may also be argued that at times of expanding economic activity, strict application of skills-based selection and hiring criteria may become more relaxed. The opposite is the case during times of activity contraction. Firms whose production plans are constantly being revised downwards, are much more hesitant to hire new personnel and, instead, prefer to cover their needs by intensifying their existing staff's utilisation. Those seeking employment, especially young unemployed, will only be considered for hiring, if they are able to convince their prospective employers of their comparative advantages in terms of modern and directly applicable skills that older workers may be lacking. The question therefore that needs to be

answered, for both the labour market as a whole, but also specifically for the Tourism sector, is whether young unemployed persons do possess skills that may be quickly applied and contribute to the hiring firm's best interest. In other words, have they managed, through studies, training and/or work experience, to acquire skills of direct relevance and immediate applicability in tourism enterprises? And, are they sufficiently well prepared for convincingly presenting such "comparative advantages"? Lack of such skills-based comparative advantage may, of course, be balanced by lower pay and this is certainly to be considered too.

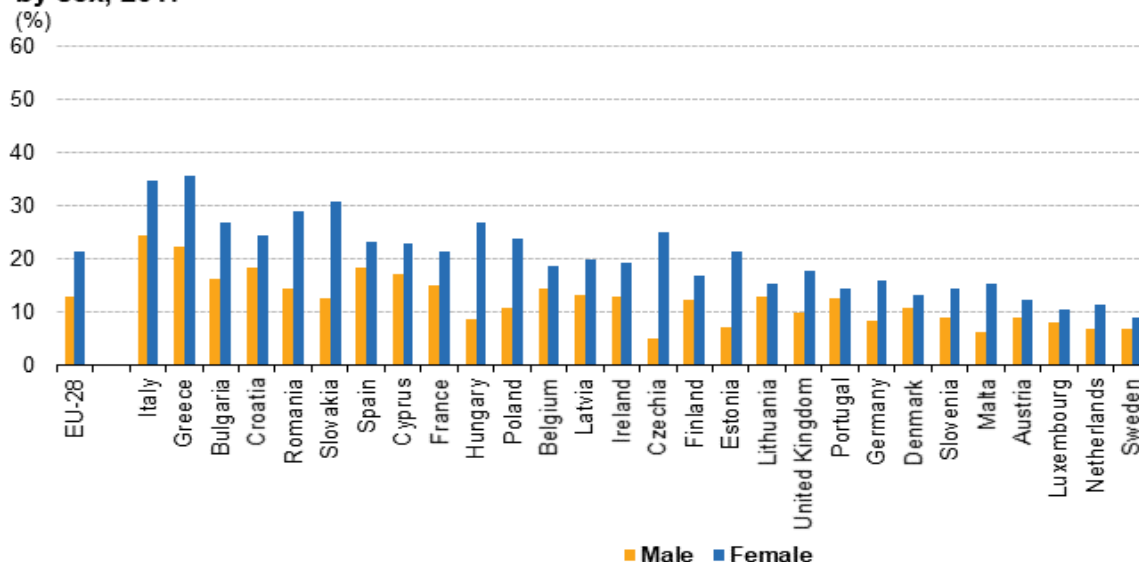
In a relatively recent study (2014), conducted by McKinsey Consulting, in collaboration with the country's Tourism Enterprises' Association (SETE), several of the main findings concerned a number of serious supply-demand mismatches, identified by tourism sector employers, for a number of tourism related jobs and also a series of characteristic labour force's skill gaps. In particular:

- Employment in the Tourism sector was expected to continue to increase, both in existing and in new tourism enterprises. It may be noted that these 2014 predictions have been confirmed by later developments (see above).
- Job opportunities will continue being related to the seasonal pattern of tourism activity in Greece. Larger units operating throughout the year are expected to offer more employment opportunities and such opportunities will be available in both large hotels and smaller tourism units.
- Due to relatively high levels of unemployment in the economy, tourism enterprises seem to be confident that, in quantitative terms, they will not, generally speaking, have problems in satisfying their needs for employees.
- The major challenge, however, seems to be the perceived inadequacy of work experience and of appropriate skills of those considered for hiring.
- Demand is expected to be highest in what is defined as "basic jobs" in tourism enterprises (i.e. waiters, Front Desk personnel, cooks, hotel maids and bartenders). According to the study's estimates, such needs account for more than 70% of total future personnel needs.
- As to identified "skills gaps", these are most pronounced and affect all "basic" types of jobs, in the following areas: work experience, professional skills, such as language skills and a range of "soft skills", such as: integrity, reliability, responsibility, team management.

Regarding young people's prospects in the labour market, the results of another study should also be considered (particularly so, because the study also examines the specific case of NEETs). In general, the study found that *young people in Greece define their individual*

conditions as “difficult and unbearable”. According to that study, one in three young people in Greece and half the country’s NEETs, face severe difficulties in their daily lives, a finding which, in combination with other research results, demonstrates the strong psychological impact of marginalization of young people and their alienation from the labor market and the

Young people (aged 20–34) neither in employment nor in education and training, by sex, 2017



Note: ranked on the average share for men and women (aged 20–34).

Source: Eurostat (online data code: edat_lfse_20)

educational process. Regarding the employment status and, more generally, the relationship of young people (including NEETs) to employment, the research findings clearly show that the economic crisis has contributed decisively to youth unemployment.

What is even more interesting is that when it comes to such people’s views regarding *training and its relation to employability*, only 15.9% of young people and 17.7% of NEETs have attended a vocational training programme in the past. Among the minority of young people with experience of training programmes, the vast majority considers training ineffective! It is obvious that despite the unemployment situation, young people have no enthusiasm for, or confidence in, training programmes, a quite discouraging finding, given the widespread belief that problems could be decisively overcome through organisation and delivery of more training programmes.

Going Back to the NEETs’ group, it is worth noting that in Greece there is a very noticeable scarcity of comprehensive statistics and analyses. This is partly explained by the fact that, as a relatively recent Report suggested: “... NEETs in Greece are a newly found and rather unknown socially vulnerable group. The majority of the Greek population has never heard of the term NEET. Hence, the definition and characteristics of this socially vulnerable group remain unknown to the Greek society. Moreover, it is very common that the NEET population is

often confused with the total number of unemployed young people, while the (sometimes) “underlying assumption that NEETs are a homogeneous entity, is arguably, inaccurate”.
(http://thess.pde.sch.gr/jn/eu_progs/nnn/NNN_Need%20Analysis%20Report_GR2.pdf)

On the basis of what has been presented so far, the crucial issues that need to be considered are:

- **First:** Should “vulnerability of young people in the tourism sector” be interpreted and assessed in terms of how easy it may or may not be for a young person to get a temporary job in the specific sector’s labour market, only to lose it after a few months?
- **Second:** Should one distinguish between “being employed” and “becoming integrated” in the labour market?
- **Third:** How should the relation between “skills enhancement”, “registering and attending vocational training programmes” (“**more** programmes - **more** often”), “strengthening employability” and “becoming integrated in the tourism labour market”, be perceived?

And finally,

- **Fourth:** How may resulting challenges be effectively met?

2. EXISTING SUPPORT FOR YOUNG PEOPLE'S INTEGRATION IN THE TOURISM INDUSTRY IN GREECE

Key findings of Chapter 2:

- Promotion of VET for the tourism sector is considered to constitute top priority in all National and Regional Development Plans designed and implemented in Greece.
- Funding opportunities are intensively publicised, while the eligible organisations' response, the number of submitted Applications for funding and the approval rate of such Applications are quite high.
- Parallel to ad hoc training programmes' implementation, there is an entire tourism related training "system", structured at various levels.
- This multilevel "system" structure and the training programmes' design and implementation do not contribute to overall efficiency! Structural and organizational aspects impact on the "system's" effectiveness in mitigating young persons' employment vulnerability.
- Getting a job in a tourism enterprise during "peak activity" seasons may be relatively easy but discontinuities in employment do not contribute to sustainable integration in the labour market. This may be achieved in parallel to the sector's efforts to develop tourism patterns associated with enterprises operating during longer periods during the year and retention of their employees.
- This will also encourage, both employers and employees, to "invest" in "skills-strengthening" and "skills-diversification" processes, benefiting overall competitiveness, at personal, enterprise and sectoral level.
- In the last section of the Report, it was attempted to estimate and present a number of "baseline outcome indicators". It is argued that the estimation techniques to be used, the reliability of indicators estimated and their comparability over time or between different countries, is seriously constrained by the fact that available statistical data, national or international, are not, referring to detailed target groups as the indicators' definition would require. Estimates presented are tentative and provisional and may be revised, at a later stage.

2.1. Existing support measures to address the disadvantaged situation of young people in the tourism sector in Greece

Promotion of Vocational Education and Training for the tourism sector has for many years been considered to constitute top priority in all Development Plans designed and implemented in Greece. Such Plans (National and/or Regional) are, generally speaking, accessible to all types of organisations (public and private) operating in the specific sector – i.e. individual providers of training, tourism enterprises – with Employers' Associations and Certified training providers accounting for the largest share of resources allocated to such programmes. Funding opportunities are intensively publicised, while the eligible organisations' response, the number of submitted Applications for funding and the approval

rate of such Applications are quite high. Summaries of a number of such projects - regarded as “Good Practices” - are presented in a forthcoming NESET Report (*“Good practices and sustainable youth employment/entrepreneurship in the tourism industry National Reports”*). It should also be mentioned that “development of tourism-related skills” and “facilitation of young persons’ integration in the labour market” are typically among such programmers’ objectives.

Parallel to ad hoc training programmes’ implementation, there is an entire tourism related training “system”, structured at various levels (Initial Training, 2ndary and post 2ndary education, Technical schools, Higher Education). It is operated, in various forms, by various types of organisations (i.e. The Ministry of Education, the Ministry of Tourism, the Labour Force Employment Organisation - OAED, Employers’ Associations, Private Providers etc.). This multilevel “system” structure, the fact that theoretical training is not always accompanied by apprenticeships and the content of frequently overlapping training offered at different levels, do not contribute to overall efficiency! Furthermore, the fact that demand for trained personnel is closely linked to the “seasonal pattern” of tourism activity, results to: (a) discouragement of young persons to register in training programmes leading to seasonal only – and usually low-paid – employment, (b) demand for temporary personnel is mainly determined by tourism enterprises’ need to cover seasonal activity fluctuations, (c) lack of incentives to innovate in training content and tools, by incorporating subjects leading to development of skills associated with non-traditional types of tourism (e.g. Tourism Marketing specialists, Convention Tourism etc.).

All these structural and organizational aspects impact on the “system’s” effectiveness in mitigating young persons’ employment vulnerability. Getting a job in a tourism enterprise during “peak activity” seasons may be relatively easy, at least for those seeking temporary employment. Frequent interruptions, however, in their employment status does not contribute to their sustainable integration in the labour market. It is argued that this may only be achieved in parallel to the sector’s efforts to develop tourism patterns associated with enterprises operating during longer periods during the year and retention of their employees. This will also encourage, both employers and employees, to “invest” in “skills-strengthening” and “skills-diversification” processes, benefiting overall competitiveness, at personal, enterprise and sectoral level.

2.2. NESET baseline outcome indicators in Greece – Values and interpretation

In this last section of the Report, it will be attempted to estimate and present a number of so-called “baseline outcome indicators”, which are meant to present the situation of NEETs and young adults’ in the tourism sector, but also to provide a reference for assessing future changes (improvements or deteriorations).

Despite the objective just mentioned, it should be stressed that the estimation techniques that could be used and, as a result, the reliability of indicators to be estimated and their comparability over time or between different countries, is seriously constrained by the fact that available statistical data, national or international, are not, as a rule, referring to detailed target groups as the indicators’ definition would require. It would therefore be necessary to resort to various types of approximations. Despite these unavoidable compromises, the least that the reported estimators could achieve, is that they could allow some over-time comparability and, therefore, an assessment of changes, provided of course that one is able to maintain, in the future, the same approximation techniques used for the baseline period.

From the total number of nine indicators shown on the following Table, we were, at this stage, able to come up with a reasonably meaningful estimate only for one (1.1 Number of NEETs/target group engaged in active job search).

As the relevant footnote indicates, this was achieved by combining information available in various sources and by making assumptions which, although seemingly reasonable, they nevertheless contain strong element of subjectiveness. For these reasons, the estimate presented is, at this stage, regarded as **tentative and provisional** and may be revised, at a later stage, in line with a harmonised approach agreed and adopted for the entire NESET partnership. At the same time, it will then be attempted to produce estimates for as many as possible of the remaining baseline indicators shown on the Table.

Table 1. NESET baseline outcome indicators – Greece. Tentative and Provisional estimates

<i>Outcome name</i>	<i>Indicators</i>	<i>Unit of measurement</i>	<i>Baseline value</i>	<i>Baseline year</i>
1. Improved employment situation of NEETs/target group	1.1 Number of NEETs/target group engaged in active job search	Number	8,000	2016-2017
	1.2 Number of NEETs/target group in the process of starting their own businesses	Number	n.a.	
2. Increased participation in education and training of former NEETs/target group	2.1 Number of former NEETs/target group enrolled in education and training, including work-based learning	Number	n.a.	
	2.2 Number of former NEETs/target group enrolled in apprenticeships and/or mobility scheme	Number	n.a.	
3. Innovative approaches on lowering youth unemployment have been developed or adopted	3.1 Number of new approaches, methods and practices developed, piloted or adopted	Number of single approaches/ methods/ practices	n.a.	
	3.2 Number of new services targeting young unemployed established, strengthened or adopted	Number of single services	n.a.	
	3.3 Number of beneficiaries of services provided	Number	n.a.	
4. Increased transnational cooperation on labour market issues	4.1 Number of eligible entities from the Donor States taking part in transnational cooperation projects	Number	n.a.	
	4.2 Number of eligible entities from EU Member States taking part in transnational cooperation projects	Number	n.a.	

NOTES ON INDICATOR 1.1.:

1. The number of NEETs/target group engaged in active job search shown, corresponds to persons in the 25-29 years' age group.

2. Statistical, Sources and Hypotheses used: (a) Young people 25-29 yrs old and NEETs rate, as percentage of age bracket population (33.5%) (Source: <https://tradingeconomics.com/greece/labor-force-participation-rate> and Eurostat (online data code: edat_lfse_18), (b) Rate of people seeking work (% of labour force): 3% (Source: https://ec.europa.eu/eurostat/statistics-explained/images/e/e2/Unemployment_and_supplements) and ILO for corresponding Global Rate (20%).

CONCLUDING REMARKS

The Concluding remarks accompanying the material presented in this Report, are the following:

- The Tourism sector has historically been one of paramount importance for Greece's economy. It accounts for a significant share of GDP and is a major employer, for both skilled and unskilled labour force. Because of the geographical dispersion of tourism enterprises, it also contributes to most regions' economies, thus contributing to mitigation of socioeconomic regional disparities.
- In recent periods of widespread economic crisis, the sector has performed considerably better than the rest of the economy and its activity reached recently record levels. It should however be also mentioned that, to a large extent, the sector's performance is the result of external demand.
- The structural feature which continues to characterise tourism activity in Greece is its pronounced seasonal pattern, with a large part of this activity concentrated in a relatively short part of the year (3-4 months). Successive programmes aiming at changing this, have not been sufficiently successful. This has serious implications on (a) the structure of the sector's demand for labour, (b) the not adequately diversified tourism offers and, as a result, (c) the weakening of enterprises and prospective tourism employees' incentives to invest in skills development programmes.
- Public and private sector initiated training programmes are many and resources absorption is substantial. Their design and overall structure are not however considered to be sufficiently effective, as they mostly perpetuate long established patterns of promoting basic skills, instead of skills that would be required by more modern types of tourism, in which Greece could claim a competitive advantage.

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