

ESSA-SPORT

Improving the Supply of Skills to the Sector

NATIONAL REPORT

**Analysis of labour market
realities and challenges in
the sport and physical
activity sector**



Italy

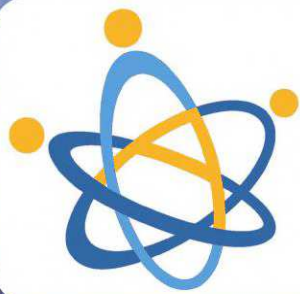
September 2019

TABLE OF CONTENTS

TABLE OF CONTENTS	2
1. THE ESSA-SPORT PROJECT AND BACKGROUND TO THE NATIONAL REPORT	4
2. NATIONAL KEY FACTS AND OVERALL DATA ON THE LABOUR MARKET	8
3. THE NATIONAL SPORT AND PHYSICAL ACTIVITY SECTOR.....	12
4. SPORT LABOUR MARKET STATISTICS.....	20
5. NATIONAL EDUCATION AND TRAINING SYSTEM	25
6. NATIONAL SPORT EDUCATION AND TRAINING SYSTEM	36
7. FINDINGS FROM THE EMPLOYER SURVEY.....	40
8. REPORT ON NATIONAL CONSULTATIONS	47
9. NATIONAL CONCLUSIONS	49
10. NATIONAL ACTION PLAN AND RECOMMENDATIONS	52
BIBLIOGRAPHY.....	55



This national report has been produced by the *University of Cassino and Southern Lazio (UNICAS)* who are a full partner and national coordinator in the ESSA-Sport project, using the methodology and structure provided by the coordinator EOSE.



ESSA-SPORT

Improving the Supply of Skills to the Sector

1

THE ESSA-SPORT PROJECT AND BACKGROUND TO THE NATIONAL REPORT

1. THE ESSA-SPORT PROJECT AND BACKGROUND TO THE NATIONAL REPORT

a) The ESSA-Sport Project

The aim of the ESSA-Sport project, funded by the European Commission under the Erasmus+ programme, was to establish a European Sector Skills Alliance covering the full breadth of the sport and physical activity sector across the European Union. The project was a direct response to the identified needs and challenges of the sport and physical activity sector.

The 3-year project, which began in October 2016, aimed to create a knowledge base and plan for action within the sector on the key issues of skills and workforce development which are central to helping the sector grow, to equip those working or volunteering with the right skills and to enable the sector to fulfil its potential as a social, health and economic driver. The overall ambition was to create an evidential basis for change and improvement, to create a major consultation on skills and to build a lasting consultation network at national and European level to take forward the conclusions and recommendations made in national and European Reports.




The project has identified skill needs and future priorities based on national and European level research and consultation activities.

The consortium, composed of 20 national coordinators and 5 European networks, is proud to have generated new knowledge and data as well as consultation activities at all levels to support policy and priority actions in the sport and physical activity sector.

a) The National Report

This National Report presents the main findings collated and analysed through the ESSA-Sport project at the national level.

Each nation in Europe has its own specificities, realities and challenges in terms of employment and skills in sport and the aims of the national report are:

-  to describe the national sport and education systems
-  to present new knowledge gathered for the sector in terms of employment and skills
-  to propose concrete conclusions and recommendations/ priority actions for implementation at the national level.

b) The sport and education system

The first step of the overall process was for all national coordinators to conduct a series of desk research activities using a common methodology.

Firstly, in Section 2 of this report, there is a presentation of key political, geographical, economic and population factors and characteristics of the national labour market.

Section 3 presents the characteristics, evolution and future perspective of the national sport and physical activity sector/system.

The overall national education and training system is presented in Section 5 whereas the way it is specifically organised in the sport and physical activity sector is presented in Section 6.

c) Sport Labour Market Statistics

Section 4 of the national report focuses on the work carried out by national coordinators and main findings obtained in an attempt to collate available data and statistics on the sport and physical activity labour market in all EU Member States.

Indeed, to make an impact on the sector and allow it to unlock its potential to improve people's lives, it is necessary to have a precise idea of the size and characteristics of the current labour market, and information about changes and tendencies. This information has been missing for many years since the last (partial) attempt to get a European map of employment for the sector took place in 2004 (Vocasport project, EOSE 2004).

The aim of the current initiative was to fill a knowledge gap by undertaking wide research activities at both European and national levels to identify the scale and scope of employment in the emerging and growing sport and physical activity sector.

NACE is the statistical classification of economic activities in the European Community, while ISCO is the International Standard Classification of Occupations. The ESSA-Sport consortium has been successful in collecting the most relevant NACE and ISCO data related to the sport sector, gathered from National Statistics Offices and the European body Eurostat. This data on the size and characteristics of the sport labour market at the national level is presented in section 4.

d) European Employer Skills Survey

Following the desk research and collection of available statistics for the sport labour market, the focus was then to design and launch the first ever European Employer Skills Survey for the sport and physical activity sector. The objective was to consult the widest variety of employers from the sector and collate data on the labour market, skills needs, gaps and shortages, future tendencies/perspectives, realities and difficulties to recruit and retain staff and volunteers.

In the context of a dynamic and complex labour market, gathering information on current and future skill needs can support better matching of education, training and employment.

In recent years, better understanding of labour market needs and skills matching have featured prominently on the policy agenda of many countries, driven by both rapid technological advances and global competition. Skills matching can also help reduce unemployment, particularly among young people. It helps to build a better life for individuals by improving employability, social mobility and inclusion.

The ambition through the design and launch of the first ever European Employer Skills Survey for the sport and physical activity sector was to identify and analyse the growing and changing labour market, to build an up to date picture of employment, and to identify the skill needs and future priorities based on national and EU level research – building a skills map for the sector.

The main results and key information from the European Employer Skills Survey at the national level are presented in Section 7 of this report.

e) Consultations and conclusions

Once all of the employment and skills data had been gathered from sources of labour market statistics and the Employer Skills Survey conducted, the aim in each country was then to discuss and consult on the data with relevant national stakeholders, through meetings, round-tables, one-to-one discussions etc. A summary report on consultation activities implemented at the national level is presented in Section 8.

Finally, it was the aim of the ESSA-Sport project to implement a bottom-up approach and present national findings and conclusions from the entire project and all activities including desk research, data collection and consultation.

The development of recommendations and actions for the sector to tackle the identified challenges will ensure the legacy of the ESSA-Sport project as the sector builds on the data collected for sustained reforms to improve skills of paid staff and volunteers and meet the potential of the sport and physical activity sector. National conclusions and recommendations are presented in Sections 9 and 10 of this report.



ESSA-SPORT

Improving the Supply of Skills to the Sector

2

NATIONAL KEY FACTS AND OVERALL LABOUR MARKET

2. NATIONAL KEY FACTS AND OVERALL DATA ON THE LABOUR MARKET

Presentation of the key political, geographical, economic and population factors relating to your country and characteristics of the labour market

a) National key facts and data

Capital:	Rome
Official EU language(s):	Italian
EU member country:	since 1 January 1958
Currency:	euro. Euro area member since 1 January 1999
Schengen:	Schengen area member since 26 October 1997

The Italian Republic is a European country consisting of a peninsula delimited by the Italian Alps and surrounded by several islands. Located in the middle of the Mediterranean sea and traversed along its length by the Apennines. The country covers an area of **301,340 km²** (116,350 sq mi) and shares openland borders with France, Slovenia, Austria, Switzerland and the enclaved microstates of Vatican City and San Marino. With around **60 million inhabitants**, Italy is the fourth-most populous member state of the European Union.

Known for its rich cultural history, Italy has been continuously the birthplace of influential and successful artists, writers, philosophers, musicians, film-makers, sportspeople, scientists, engineers, and inventors. As a reflection of its cultural wealth, Italy is home to 54 World Heritage Sites, the most in the world, and is the fifth-most visited country.

Italy has a parliamentary government based on a mixed proportional and majoritarian voting system. The parliament is perfectly bicameral: the two houses, the Chamber of Deputies that meets in Palazzo Montecitorio, and the Senate of the Republic that meets in Palazzo Madama, have the same powers. The Prime Minister, officially President of the Council of Ministers (*Presidente del Consiglio dei Ministri*), is Italy's head of government. The Prime Minister and the cabinet are appointed by the President of the Republic of Italy and must pass a vote of confidence in Parliament to come into office. To remain the Prime Minister has to pass also eventual further votes of confidence or no confidence in Parliament.

Italy is the third-largest economy in the euro zone, but its exceptionally high public debt and structural impediments to growth have rendered it vulnerable to scrutiny by financial markets. Public debt has increased steadily since 2007, reaching 131% of GDP in 2017. Investor concerns about Italy and the broader euro-zone crisis eased in 2013, bringing down Italy's borrowing costs on sovereign government debt from euro-era records. The government still faces pressure from investors and European partners to sustain its efforts to address Italy's longstanding structural economic problems, including labor market inefficiencies, a sluggish judicial system, and a weak banking sector. Italy's economy returned to modest growth in late 2014 for the first time since 2011. In 2015-16, Italy's economy grew at about 1% each year, and in 2017 growth accelerated to 1.5% of GDP. In 2017, overall unemployment was 11.4%, but youth unemployment remained high at 37.1%.

Table A. The economy is projected to recover gradually

Annual % change, unless otherwise indicated

	2018	2019	2020
Gross domestic product	0.8	-0.2	0.5
Private consumption	0.6	0.5	0.5
Gross fixed capital formation	3.2	-0.2	1.1
Exports	1.4	2.7	2.3
Imports	1.8	2.1	2.7
Unemployment rate (%)	10.6	12.0	12.1
Consumer price index	1.2	0.9	0.8
Fiscal balance (% GDP)	-2.1	-2.5	-3.0
Public debt (gross, % of GDP)	132	134	135
Current account (% of GDP)	2.6	2.7	2.4

Source: OECD *Economic Outlook 104* database, including more recent information.

Table 1 Total Population 2010-2016, disaggregation by Gender and Age

	TOTAL POPULATION	BY GENDER (%)		BY AGE (%)				
		Female	Male	0-14	15-24	25-54	55-64	65+
2016	60665551	48.6	51.4	13.6	9.7	41.7	12.8	22.1
2015	60795612	48.5	51.5	13.8	9.8	42.0	12.6	21.9
2014	60782668	48.5	51.5	13.9	9.8	42.4	12.5	21.4
2013	59685227	48.4	51.6	14	9.9	42.4	12.5	21.2
2012	59394207	51.6	48.4	14	10	42.8	12.5	20.9
2011	60626442	51.5	48.5	14.1	10	43.1	12.4	20.2
2010	60340328	51.5	48.5	14	10.1	43.4	12.2	20.1
Please indicate the source		Italian Institute of Statistics, Census. Data cross checked with http://www.tuttitalia.it						

b) Characteristics of the overall labour market

The most important sectors of Italy's economy in 2016 were wholesale and retail trade, transport, accommodation and food services (20.9 %), industry (19.3 %) and public administration, defence, education, human health and social work activities (16.9 %). Intra-EU trade accounts for 56% of Italy's exports (Germany 13%, France 11% and United Kingdom and Spain 5 % each), while outside the EU 9% go to the United States and 5% to Switzerland. In terms of imports, 61% come from EU Member States (Germany 16%, France 9% and the Netherlands 6%), while outside the EU 7% come from China and 4% from the United States. Italy has a diversified industrial economy, which is divided into a developed industrial north, dominated by private companies, and a less-developed, welfare-dependent, agricultural south, with high unemployment. The Italian economy is driven in large part by the manufacture of high-quality consumer goods produced by small and medium-sized enterprises, many of them family owned.

Italy's labour market segmentation had been increasing since the late 1990s. The Treu Package (1997) and the Biagi Law (2003) relaxed the discipline for standard temporary contracts and introduced new forms of "atypical" non-permanent contracts (e.g., agency work) while maintaining existing rules on permanent contracts. Also as a result of these reforms, employment grew strongly until the 2008 crisis and then again in 2014, but more than half of the new jobs were temporary (1.4m over 2.7m additional jobs created from 1998Q1 to 2015Q3). The share of temporary employment in the total number of employees increased from less than 8% in 1998 to nearly 15% in 2015Q3. The percentage was slightly above the EU28 average in 2016Q4, albeit the EU aggregate hides great variation across EU countries. In line with the theoretical predictions, the two-tier labour market reforms had a transitory honeymoon effect on total employment (Boeri and Garibaldi, 2007). Italy also has a sizable underground economy, which by some estimates accounts for as much as 15% of GDP. These activities are most common within the agriculture, construction, and service sectors. Italy has moved slowly on implementing needed structural reforms, such as reducing graft, overhauling costly entitlement programs, and increasing employment opportunities for young workers, particularly women.

The labour market is changing rapidly in Italy. Despite widespread anxiety about job destruction driven by technological change and globalisation, a sharp decline in overall employment is unlikely. While certain jobs may disappear (14% are at high risk of automation in the OECD), others will emerge, and employment has been growing overall. However, transitions will not be easy. There are concerns about the quality of some of the emerging new jobs and, without immediate action, labour market disparities may grow, as certain groups of workers face greater risks than others.



ESSA-SPORT

Improving the Supply of Skills to the Sector

3

THE NATIONAL SPORT AND PHYSICAL ACTIVITY SECTOR

3. THE NATIONAL SPORT AND PHYSICAL ACTIVITY SECTOR

Presentation of the characteristics, evolution and future perspective of the national sport and physical activity sector/system

Compared to other European countries, the configuration of the Italian sports system is significantly different. This is principally due to the fact that, until recently, the systems gave to the Italian Olympic Committee (henceforth, CONI) sweeping responsibility over the entire sports system, de facto attributing to the organisation not only the functions elsewhere exercised by the Ministry of Sport but also those specifically belonging to specialised agencies.

In order to understand the origins of this anomaly, we will illustrate the historical framework within which it has developed. Our socio-diachronic analysis will consist of: a chronological sequence of six periods, a different organizing concept as a definition of the sporting system for each period, the mention of the main facts, measures and occurrences in the sport organization policies, the citation of the main political and sports events, and the sports participation data provided by the Italian National Statistical Institute (henceforth, ISTAT).

a) The first period: 1914-1945

The description of the first period begins highlighting the peculiarity of the system originated as a consequence of a series of contingent events starting from the establishment of CONI in 1914, which have since consolidated into the present system (Marani Toro, Marani Toro, 1977). In fact, some sports Federations already existed before 1914 as the governing bodies of specific Olympic sports and felt disempowered by the creation of CONI. The contrast was terminated with the advent of Mussolini, head of the fascist government, in 1922. Although the Italian dictator did not initially look favourably on recreational sport associations, considering them as belonging to the «circle of opponents» (Ministry of Internal Affairs, Circular n° 11570 of 18th May 1923), he soon realised that sports activities could serve his agenda for social control well. During the Ventennio – the twenty-year period Mussolini was in power – sport came to be gradually utilised as a means to control the “body of the nation” through a widespread network of activities and events that involved large segments of the population. In addition, physical activity, namely gymnastics, once again emerged as an instrument to forge good soldiers and, more in general, to impose discipline on the individuals who upheld the values that the regime was enforcing. A clear example was the submission of the School Physical Education to the Fascist Party: PE teachers were, in fact, directly trained in a specific Academy and employed by the party, and not by the State, as those of the other subjects: «the teacher, in fact, is maintained as protagonist of the body Fascist revolution; through the Academy, Physical Education had to become the basic element of the formation of out-and-out apostle of Fascist education» (Motti, Rossi Caponeri, 1996: 74). To this aim, it was crucial that the activities of sporting associations were centralised and put under the direct control of the fascist government. CONI was singled out as the organisation through which that control could be carried out (Barbarito, 1937) not least because of its representative role at the international level, which made it an extraordinary tool for propaganda. The double victory in the FIFA World Cup in 1934 and 1938 and the fourth place in the 1936 Berlin Olympic Medal Table confirmed the efficacy of that strategy. In other words, sport took up a central role in the Italian society.

Drawing on Porro’s (1996) description of the “sport for everyone” fascist policy, our organizing concept for the period 1914-1945 depicts the sporting system as a means of authoritarian modernisation. In this way, though, the governing body of sport was turned into an apparatus of the regime through which the government could maintain a direct control over all the activities carried out by sporting associations and,

broadly, over the entire population. From a political standpoint, at macro level, the dynamics between the sports actors of the period were crystallised. There was absolutely no manoeuvring space among political parties as a single and compact coalition intervened in defining the policies that were to be implemented. The coalition, naturally, hinged around the value system and authority endorsed by the regime.

b) The second period: 1945-1960

With the fall of the fascist regime and the end of World War II, the political and government apparatus collapsed, ushering wholesale change and innovation at the political level. With the entrance of the second period sport remained substantially impervious to the dynamics of change. In fact, CONI continued to be firmly in place at the helm and with a focus on high-level competitions (Provvisionato, 1986). Thus, CONI acted as the de facto Ministry for Sport inasmuch as it was the body in charge of promoting sport activities at all levels and of supervising the sports movement throughout the nation.

The newly established Italian Republic thus witnessed the development of a sports system that on paper had a pyramid and rather inflexible structure. But notwithstanding the system's organisational rigidity, the sports movement had regained the dynamism it had lost during the Ventennio. Democracy gave new impetus to dialectics. A newly created subject principally voiced the dissatisfaction: the organisations for the promotion of sport for all (later recognized as Enti di Promozione Sportiva, henceforth EPS, in 1979). Set up as subjects external to the CONI system, these had first developed between the '40s and '50s around strongly ideological organisations, openly declaring their affiliation to the political parties. EPS were thus considered as the "armed wing" of political organisations whose task was to intercept citizen-voters in their free time and to promote a sports activity whose social function was in line with parties' ideals. It can safely be claimed that the underlying rationale, our second organizing concept, at that time was to consider the sporting system as a political arena.

Although the links the EPS had with political parties weakened over the time, they continued to maintain a characteristic distinction with respect to the CONI system, shying away from the high-competitive approach to sports. The development of EPS did indeed contribute significantly to make the system more dynamic, fostering an often harsh debate between old and new actors who all vied for space and influence in the sports politics of the time (Di Monte, Giuntini, Maiorella, 2008) outlined a sports system that was clearly divided in two fronts: an official sports front constituted by CONI and National Sport Federations (henceforth FSN), linked to the Olympic values and informed by the paradigm of competitive sport, and a collateral front made up of non-Olympic Federations and EPS whose action, animated by the paradigm of sport considered as a means for social intervention, combined or clashed with the official front. And it was this very dialectics between the two coalitions that shook the Italian sports system, questioning for the first time the hegemony of CONI and the efficacy of an approach – as the EPS coalition remarked insistently – too biased towards competitive sport and thus incapable of intercepting the new requirements emerging in society. However, the organization of the successful Rome Olympics in 1960 confirmed the leading role of CONI and inaugurated, thanks to the TV broadcasting, the era of sport as global phenomenon contributing at the setting of the following development. In fact, as argued by Maguire, the development of sport as global phenomenon and so its pervasiveness in the society, is closely linked to the emergence of a global media communication (Maguire, 1999).

Physical Education became a mandatory subject in all the secondary schools in force of the Law 88/1958. Furthermore, as additional proof of the social interest for the sport, ISTAT developed its first statistic survey about the sector. Data collected showed that only the 2,6% of Italians were practicing sport with 4,9% of men and just 0,5% of women. Regardless the limits of the methodology adopted in the collection, it can be safely maintained that sport was still considered as a practice belonging to a small élite.

c) The third period: 1961-1982

The two decades following the Italian Editions of the Winter (1956) and Summer (1960) Olympic Games did indeed bring about profound changes to the sports movement that, inevitably, was not immune to the social and political climate that shook society at that time. The sports system emerged as a mass and counter culture (the third organizing concept) into which the new pressing demands for emotions, well-being and leisure could be satisfied. On the other hand, in a period characterised by extensive protests, when the very foundations of society as a whole were being seriously challenged, the sports movement came inevitably under violent attack as well. Those years saw the publication of the pamphlet in which J. M. Le Brohm (1978) labelled sports as a key factor in the social conflicts that were flaring during the 1968 Protests. EPS rode the wave of discontent and gave new impetus to their political action by demanding that sport be acknowledged as an inalienable core value. Sport, they claimed, was a right that had been unjustly denied and which had to be regained for all as a tool to contrast the paradigm of all-out competitiveness. The 1968, as well as the dialectics within the Italian sports movement, left deep marks in Italian sports. While some success was recorded in the action aimed at spreading the concept of sports as a right of citizenship, with an increasing number of citizens practising sports, the hegemony of competitive sport as well as the stifling presence of the Olympic movement showed no sign of abating.

The not well-examined aspect we would like to emphasize here concerns the change occurred in the methods of delivering Physical Education classes and the widening of the concept of sport strictly connected with the change in the body discourse. The '70s witnessed an epistemological turn leading to the formation of new pedagogical sensitivities influenced by French psychomotricity and by Far Eastern holistic disciplines: the traditional performance-oriented practices were joined by perception-oriented activities like baby swimming, yoga, physical activity for elderly people as well as for disabled. This radical change of mentality mirrored broader important evolutions in Italian's society and notably in the gradually increasing recognition of women, whose claim for their right of self-determination led to the legalisation of divorce (Law 194/1970) and abortion (Law 898/1978). These factors were part of the process that led to the increase of the participation in sport. Therefore, in 1982 the percentage of those regularly practicing sport in free time was the 15,4% of the population with the women practice rate at the 9,5% and a gap of around 7% between the most active area, the North-East (18,7%), and the South (11,3%) (ISTAT, 2002).

d) The fourth period: 1983-1995

Between 1980 and 1995 there was the resurgence of a sports system tightly connected to the economic paradigm (fourth organising concept: sports system as an economic system). The Olympic Games formula was, in fact, gaining an ever firmer foothold while a television schedule driven by sporting events, significantly contributed to increasing the economic value and appeal of competitive sports. CONI and FSNs received new impetus thanks to the increased economic power deriving from the greater income from the Totocalcio, the football pools. Moreover, the economic approach was boosted by the victory of Italian football team in the 1982 FIFA World Cup, by the organization of the 1990 edition of the FIFA World Cup and by several other relevant achievements in many sports disciplines. In this light, it proved to be very difficult for the EPS – which had been officially recognised and were now part of CONI – to sustain an alternative to showbiz sports due also to the economic disparity between the parties involved. It cannot, however, be denied that the enormous resources now available provided a strong impulse to the development of the national sports movement.

In the 90s the betting diminished drastically, bringing dramatically down the resources CONI (and the sport system in general) could rely on. Lower income from betting meant that CONI was no longer able to

support sports at grassroots level to the detriment of the activities carried out by sports associations. As a consequence, the needed sweeping reforms within the sports system (Coccia et al., 2004) brought about profound changes. First and foremost, CONI lost its financial autonomy and new organisations came into the scene (e.g. CONI Servizi SpA) to broaden the playing field and manage sport in a more marketable way. However, regardless the crisis, the growth of sport participation went hand in hand with the growth of the third sector favouring those sport associations more engaged with the spread of social enterprises and less conditioned by CONI's funds: in 1995, the percentage of Italians regularly and occasionally practicing was 26,6% (35% men, 18,6% women) and the gap between Northeast (32,5%) and South (19,2%) and Islands (18,8%) had increased at around 13% (ISTAT, 2002).

e) The fifth period: 1996-2001

In the second part of the Nineties, the reaction against the corruption scandals (known as Tangentopoli) which devastated the Italian political system led to a season of greater interest for the social issues. The three governments of that period posed a greater attention to societal aspects opening the phase of the welfare policies. Sport was not acknowledged as part of the new strategy since the beginning but, for example, selected sport organizations were recognized as social promotion bodies (Law 383/2000) (Borgogni, 2009). In fact, those policies, including that ruling the non-profit organization of social utilities, ONLUS (Law 328/2000) were also the result of the growth of the third sector that about tripled the turnover and employed in that decade (Barbetta, 2000). It is worth noting that the physical activity was for the first time mentioned in the health National Plan 1998-2000. Moreover, the establishment of the Faculties of Sport Sciences (Legislative Decree, 178/98), which gave academic status to the degree in PE, completed the frame of legislative actions aiming at governing and appraising the sport sector and to highlight this period as the Establishment of sport as welfare system (our fifth organizing concept). In 2001, the percentage of Italians regularly and occasionally practicing sport was the 29,7% showing a reduction of the difference between men (34,3%) and women (23,3%) and the stabilization of the gap at around 13% between North East (36,3%), on the one hand, and South (23,2%) and Islands (23,0%), on the other (ISTAT, 2005).

f) The sixth period: 2001-2013

After the reform of the Title V, a part of the Constitution aiming at the subsidization of policies (2001), the sport affairs have been progressively transferred to the Regions and local authorities, which have received assignments in terms of the promotion of sport and recreational activities as well as a responsibility for the management and development of sport facilities. The rationale behind this decision is to insert sport - broadly intended as including the domain of play, body culture and all kind of movement expressions - in the sphere of people and community services, by recognising participation as a right that must be equally available among all segments of the population. However, as we will maintain below, this process in absence of a State oversight, has been highlighting the already existing relevant differences between Northern and Southern Italy.

In 2006, the percentage of Italians regularly and occasionally practicing sport was the 30,2% with a relevant difference between men (36,9%) and women (23,9%) and the gap between Northeast (36,5%) and South (23,3%) remaining at 13%. The 61,5% declared to practice in indoor sport facilities (81,8% women, 47,6% men) and the 43,3% (56,5% men, 24,1% women) outdoor (ISTAT, 2007). The same survey revealed the alarming phenomenon of the decrease of people who were doing some kind of physical activity outside institutionalized/formalized sports from 35,3% in 1995 to 28,4% and, in parallel, the growth of inactive people from 37,8% in 1995 to 41,0%; the 40,2% of the inactive expressed the lack of

time as main motivation. In the age group 10-24, the 15,8% (19,2% women, 12,6% men) suspended the practice of sport having as main motivation the lack of time (38%) or because school commitments (23,1%). In 2005, inactive disabled people were the 84,5% versus 47,1% of non-disabled with a thought-provoking situation in the group age 6-44 - 41,9% disabled, 58,8 non-disabled (ISTAT, 2006). As further data, it is worth noting that in 2003 there was one sport facility every 264 inhabitants - 354 Northeast, 150 South and Islands - (CNEL, 2005). The sport clubs enrolled to CONI in 2007 were around 66.000; the impact of the sport sector on the GDP was around 3%; the voluntary work figures showed a mean of 10 volunteers per club providing five hours of job per week (CENSIS, 2008).

In such a kind of context, the recent years witnessed two periods in which the State ruled sport matters with the establishment, for the first time in the Italian history, of the Ministry of Sport in the experience of the Prodi government (2006-2008) and, limited to few months during the Letta government (2013 onward). In particular, the 2006-2008 government endeavoured to bring about a reform of sport, aimed to define and favour “citizenship sport” over competitive sport failed owing to the strong opposition of CONI and, later, the fall of the government.

The most recent synthetic survey shows in 2012 a slight increase of the people practicing (31,1%) including both those who practice regularly (21,9%) and occasionally (9,2%). The gap between men (37,7%) and women (24,9%) is stable and the inactivity rate slightly decreasing (39,2%). The gap in people practicing between Northeast (38,6%) and South (21,7%) display an alarming increase up to 17% with the South also showing a 52,2% of inactive people. The differences in participation based on the level of instruction are also relevant: in 2012, in fact, rates of inactivity for people with a primary education (50,2%) is more than double compared to those with a University degree (23,3%) and is even more accentuated in the age range 25-44 (65,8% vs. 20,0%) (ISTAT, 2013).

Thus, over the past 15-20 years we have witnessed to the season of the progressive acknowledgment of sports system in the welfare system (sixth organising concept) characterised by a boom of sports-based projects developed within the sphere of social intervention (Madella, 2006) and by requests made to the sports sector with high social contents. These trends have consolidated also because international actors are increasingly seeing sport as having a strong social potential. In this light, a significant boost was given by the United Nations (2003), whose declaration no. 58/5 declaration has officially recognised the role of sports in fostering peace, and the European Commission, whose White Paper on sport (2007) has highlighted its social value. These statements were received enthusiastically by the Italian sport for all associations because, through the relevance given to the social role of sport, they recognized the real acknowledgment of citizenship sport in public policies. Moreover, the awareness of the advantages for health produced by the physical activity has been increased in health preventive services. However, due to the fact that Regions rule the health services, this is one of the aspects that have broadened the differences in sport participation and inactivity among Italian areas.

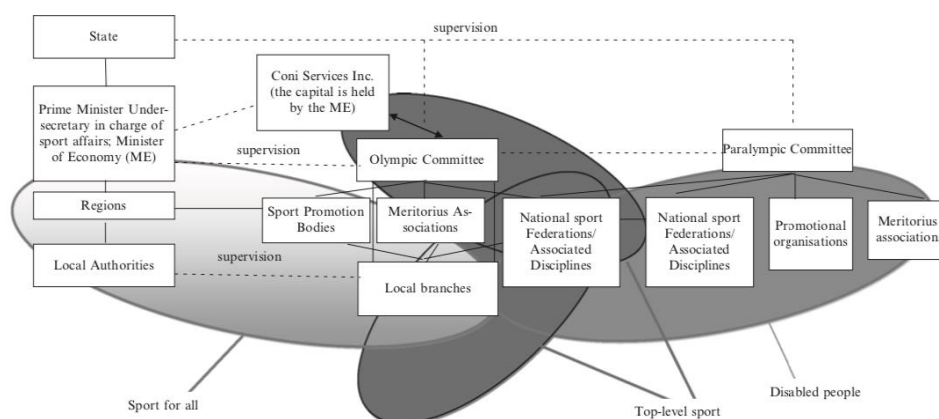
g) The system today: subsidiarity, adequacy and participation

For what concerns the sport sector, Italy currently has no national health monitoring and surveillance system for physical activity. The country has adopted national recommendations, using the cut-off points for adults reaching the recommended physical activity levels as defined by the United States Centers for Disease Control and Prevention (CDC) and the American College of Sports Medicine (ACSM). The national recommendations address youth (children and adolescents) (2) and older adults. According to national data for the years 2010—2013 from the survey by the Italian Ministry of Health’s Behavioural Risk Factor Surveillance System (Progressi delle Aziende Sanitarie per la Salute in Italia (PASSI)) — conducted by the

National Centre for Epidemiology, Surveillance, and Health Promotion (3) — 36% of Italian adults (aged 30–60 years) and 24% of older adults (aged 60+ years) meet the recommended physical activity levels

Nowadays we are witnessing to an intense phase of crisis in the Italian political system, that is anyhow driving towards a growing, even if not linear, interest to sport issues. The main divergences concern the bodies and the organizations in charge of the process. With the direct involvement of Regions and Local Authorities the principle of subsidiarity is clearly taken into account. Considering participation in sport as a right for everyone, that must be addressed effectively, and given their proximity with the territory, they are regarded to be more efficient and adequate in the definition and implementation of strategies that are better aligned to the needs of the populations. Yet it is perhaps premature to assess, on the basis of concrete data, the efficacy and the impact of the governance based on the above-described organisational structure on aspects such as the rate of sport practice. However, it can be noted that the decentralization of policies concerning sport and health has been leading towards an increase of the already existing and relevant differences among more and less developed Regions and macro areas in terms of participation. In fact, the gap between Northeast and South (and Islands) concerning those who are active (practicing sport regularly or occasionally and doing some physical activity) has increased from the 22,7% in 2001 and the 26,6% in 2012. The variance, in terms of Regional data, assumes an even more worrisome figure: the shocking percentage of 42,2% in the Region of Campania goes, in fact, with the 77,0% in Veneto and the 84,6% in Trentino Alto Adige Autonomous Region.

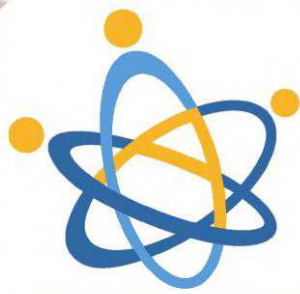
In terms of budget allocated the range is even more evident with Regions like Lazio and Veneto that in 2008 allocated more than € 20 millions to the sport system and Regions such as Marche and Calabria that assigned less than €1 millions in the same year (Censis, 2008). As general information, it is worth noting that the mean per person is € 5.37; minimum value is € 0.49 (Calabria), the maximum is € 25.69 (Trentino Alto Adige) and the standard deviation is 6.7. Of course, as already argued above, rate of sport participation is influenced by many variables but differences in terms of cultures, attitudes, strategies adopted, and actions implemented by each Region must be regarded as determinants with a high level of influence. Thus, considering the relationship between budget allocated and rate of participation it is quite evident that, with exceptions of the Regions like Emilia Romagna, Lombardia, Toscana, in which the sport participation rate was high also before the subsidization of the policies (2001), Regions with an active population tend to devote a higher per capita budget to support the sport system. Drawing a conclusion in term of sport governance, a dual governance can be envisioned in the next future, with CONI in one side and the State along with Regions and Local Authorities in the other side that share responsibilities within roles and assignments that have been partly defined.



In 2008, CENSIS (Centro Studi Investimenti Sociali, foundation commissioned by the State with a focus on socio-economic issues) carried out an investigation with a sample of 11,000 sport clubs with the aim of identifying and describing, from a statistical point of view, some of the most interesting features of the organisations operating in the Italian sport system. Given the significant size of the sample, it can be safely maintained that evidence collected can be generalised with a robust level of confidence and used to draw a general picture of some of the most interesting characteristics of the sport clubs. Broadly, sport clubs in Italy tend to be small, informal organisations with 65 members enrolled on average. They are largely basic associations without legal status (87 %) and with a short-term strategising based on informal governance arrangements and, generally speaking, a low resource allocation. Strategies are, above all, defined spontaneously and closely tied to processes of local learning and action on the ground.

Italy is subdivided into 21 regions (Regioni) that have a direct influence on the policy and strategy concerning sport (and other related sectors such as health). In this light, the most problematic aspect regarding the participation in sport activities and, more in general, the opportunity to be physical active concerns the actual remarkable regional differences within the country (Digennaro et al., 2016). In particular, Southern regions have the highest rate of inactive people: Campania, for instance, in 2012 registered a 57.8 % of inactive inhabitants; on the contrary regions such as Veneto and Trentino Alto Adige, situated in the North-East, shows the 77.0% and the 84.6% of active people respectively, percentage that are aligned with the level of participation of the Scandinavian Countries. Notable difference can be also detected in the regional financial policy. In 2008, regions like Lazio and Veneto allocated more than € 20 millions to the sport system. Conversely, regions such as Marche and Calabria assigned less than €1 million in the same year (CENSIS, 2008). Nationally, the average budget per person allocated by the regions to support the sport system is € 5.37. Again, the gap is eloquent: Calabria allocated a budget of € 0.49 per person; Trentino Alto Adige allocated € 25.69 (Borgogni, Digennaro & Mazzoli, 2018).

Censis Servizi in 2008 conducted also an analysis of the economic value of volunteering based on a sample of 11,000 non-profit sport organisations; data showed that, on average, every organisation can count on the assistance of 10-12 volunteers, who provide voluntary work for 5 hrs/week. Considering an estimated total number of 95,000 non-profit sport organisations operating in Italy in 2008, the contribution of voluntary work could be valued around 3.4 billion/year (based on 39 working weeks/year and a hourly salary of 15 €/h) (CENSIS, 2008). . A less recent study (Nomisma, 1999) estimated that in 1999 the volume of voluntary service offered to non-profit sports organizations was equal to 190 million hours. If these working hours were rewarded 15 €/h, the economic contribution of volunteers in sport in 1999 could be valued approximately € 2.85 billion (GHK, 2010).



ESSA-SPORT

Improving the Supply of Skills to the Sector

4

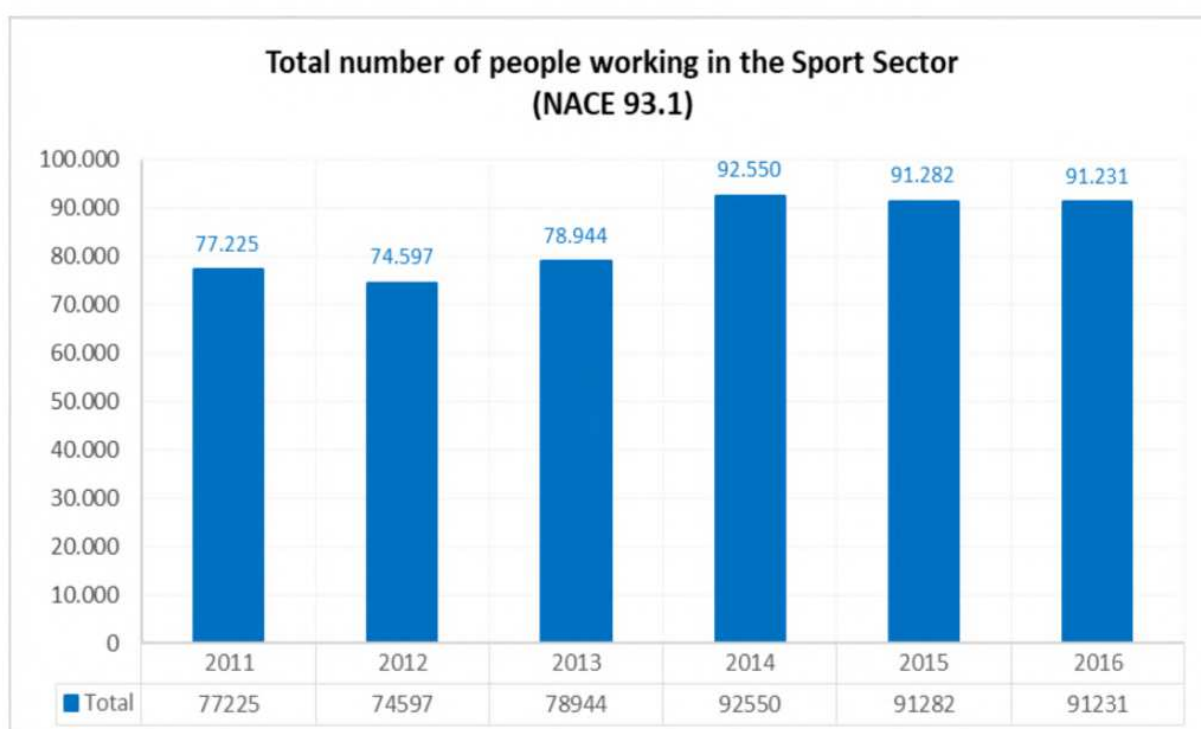
SPORT LABOUR MARKET STATISTICS

4. SPORT LABOUR MARKET STATISTICS

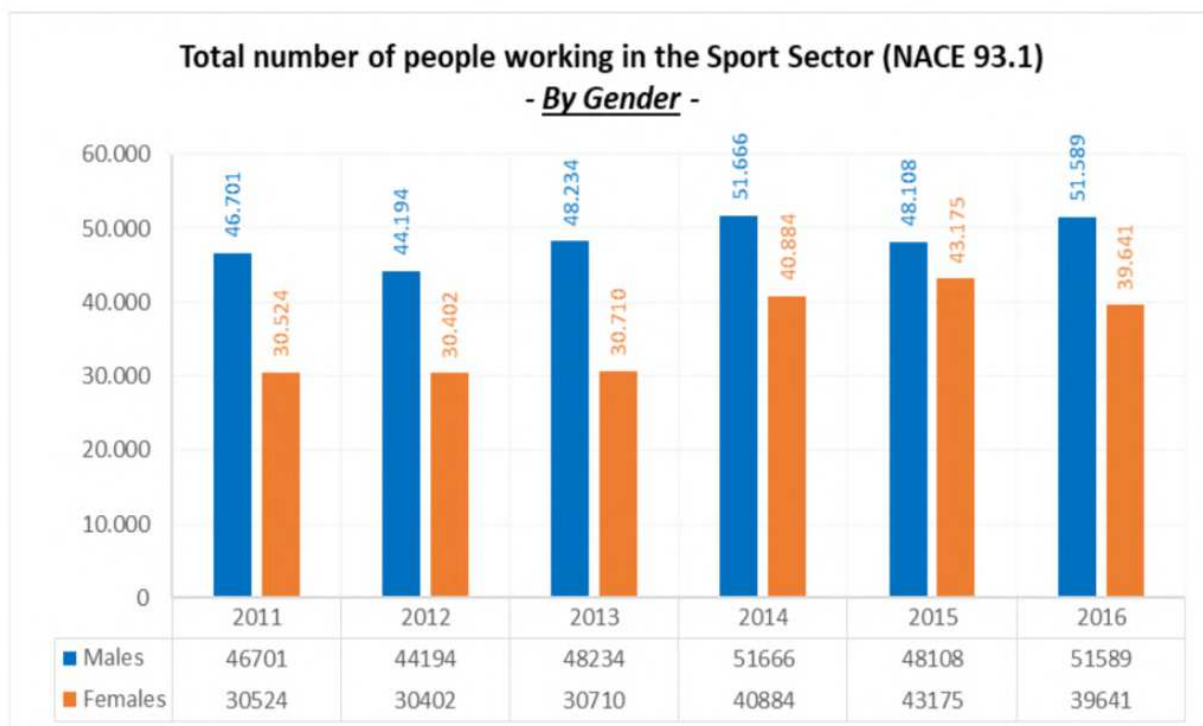
Analysis of the national sport and physical activity labour market based on analysis of available national statistics from the National Statistics Office and Eurostat.

The Italian National Statistics Office (ISTAT) offered a valuable support for the analysis of the labour sport market. It was possible to get access to the micro-data concerning the Labour Force Survey implemented in Italy in the period 2011-2016. The availability of this data offered the possibility to investigate, in details, the characteristic of the sport labour market in Italy. Likewise, it was also possible to make a comparison among the data available from ISTAT and the information provided by EUROSTAT. Some discrepancies can be noted among the statistics provided by EUROSTAT in their period report and the elaboration made on the micro-data offered by ISTAT. In fact, based on the data provided by EUROSTAT, the total workforce is 119.429 (2016); the number is lower if compared with analysis of the microdata available from ISTAT that show a total workforce equal to 138662. The difference is mostly due to the fact that through the microdata available from ISTAT is possible to include the second job.

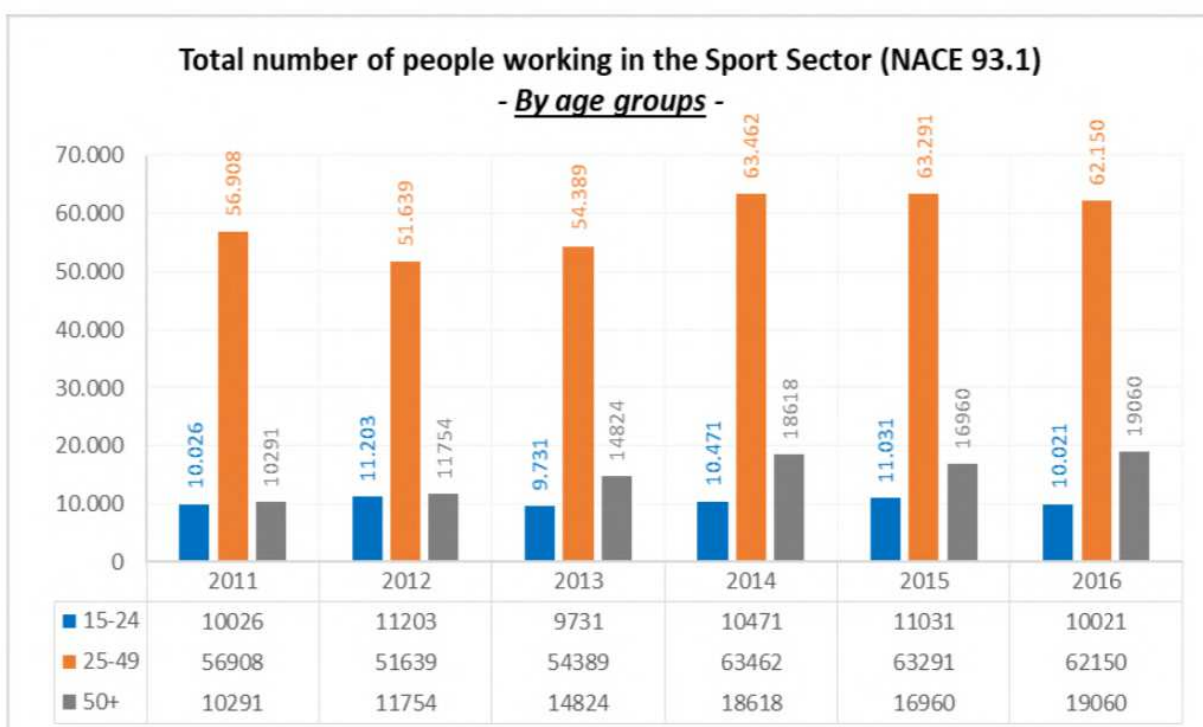
Below, the most important statistics concerning the Sport Labour Market are reported.



Between the years 2013 and 2014 the sector faced a positive trend: the overall number of people employed in the sector from 78944 rose to 92550. In the following years there was a little decline but, in general, it can be maintained that the occupations in the sector remain stable.



As it can be noted from the disaggregation per gender, the decline in the years 2014-2016 is mostly linked with female occupation. The participation of the women in the sport labour market still remain one of the most urgent problem In Italy.



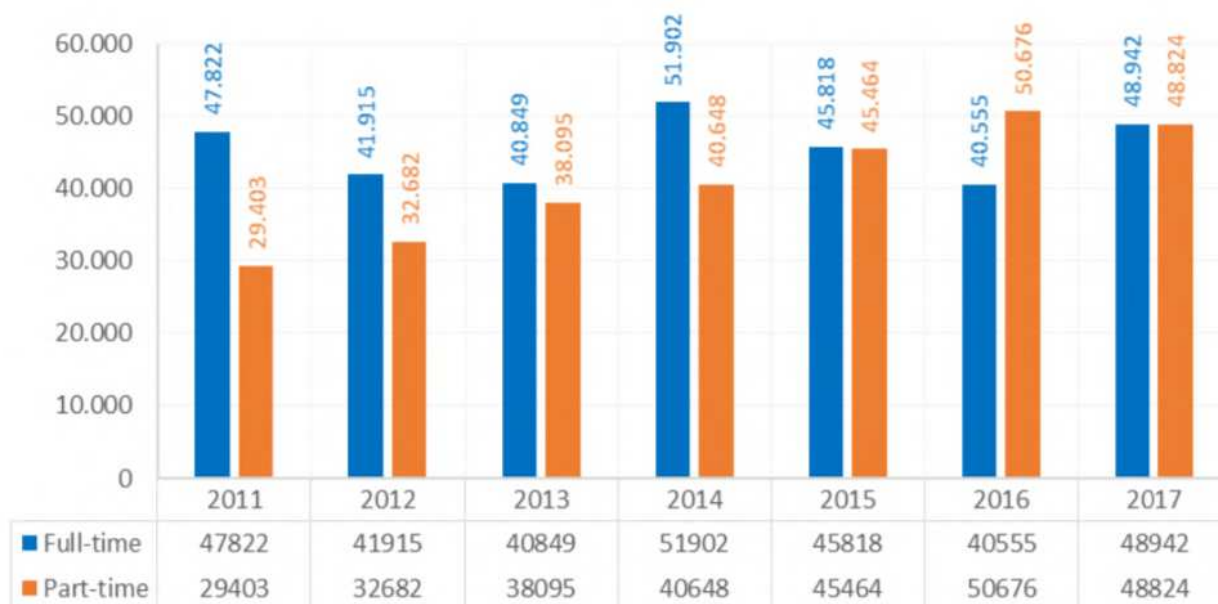
The distribution per age groups does not show any particular differences if compared with the overall numbers concerning the European Union.

Total number of people working in the Sport Sector (NACE 93.1) - By education level -



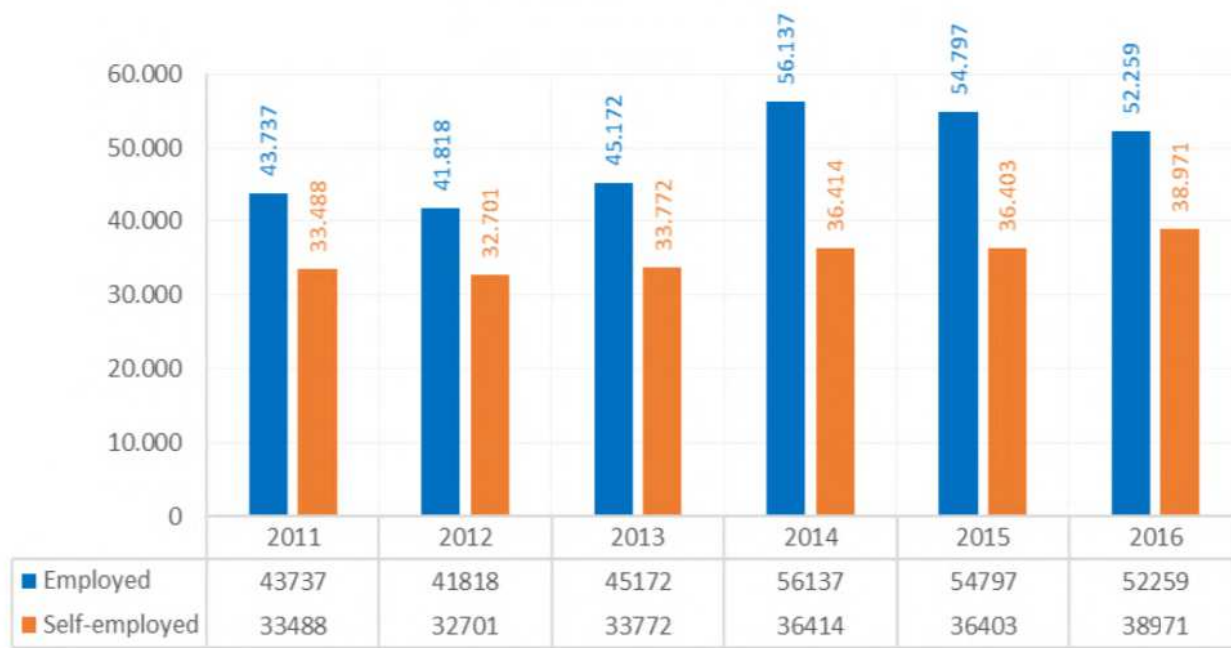
The same can be said for the disaggregation per level of education.

Total number of people working in the Sport Sector (NACE 93.1) - By type of contract -



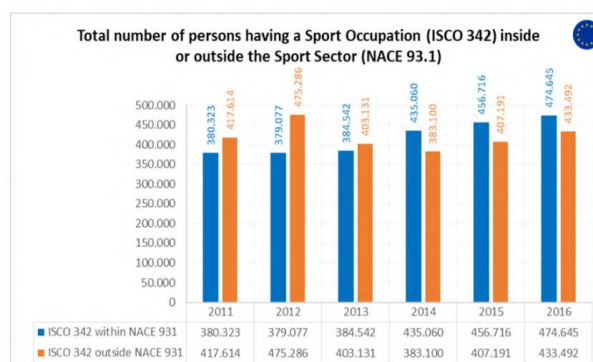
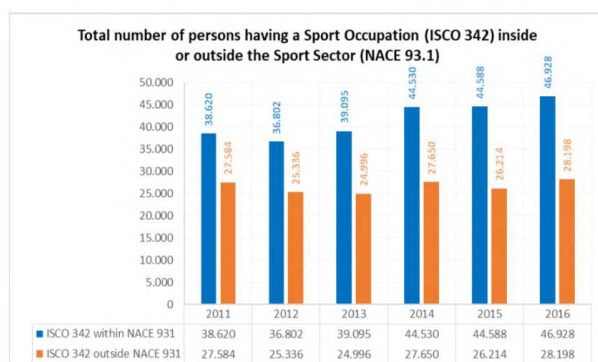
Part-time contracts, in 2016, represented the 50% of available contracts in the sector. This is a common form of contract adopted in most of the cases by the small-medium size sport organisations in Italy.

Total number of people working in the Sport Sector (NACE 93.1) - By professional status -

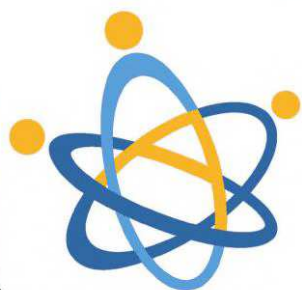


One feature of the Italian system is the large presence of self-employees that represent almost the 40% of the total.

It is worth noting now to have a close look at the figure concerning the people having a sport occupation (ISCO342) within sport organisations (NACE 93.1) and those having an occupation with non-sport organisations. The comparison of with the data concerning the EU-28 shows significant difference between Italy and the rest of Europe:



The presence of people having a sport occupation working with non-sport organisation seems to be limited if compared with the rest of Europe. This is clearly an area that requires attention in terms of policy for the promotion of the employability in the sport sector. This is a clear evidence of the fact that the employees that have a sport occupation are more required by organisation that operate in the sport sector. Outside the sport sector the attractiveness of the sport occupation seems to be still weak.

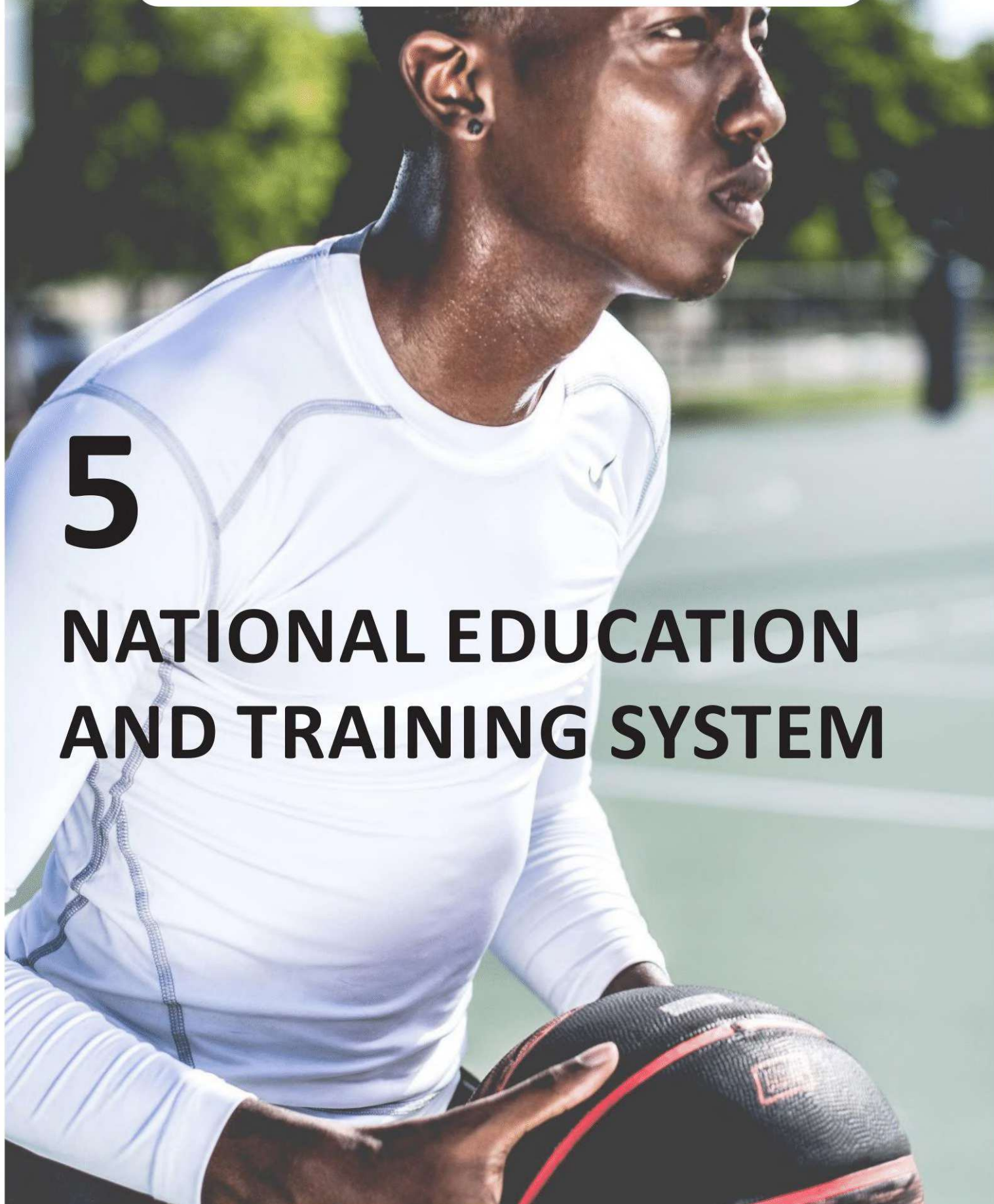


ESSA-SPORT

Improving the Supply of Skills to the Sector

5

NATIONAL EDUCATION AND TRAINING SYSTEM



5. NATIONAL EDUCATION AND TRAINING SYSTEM

Description of the national education and training system, its relationship with EU policy and initiatives.

General information

Regardless of nationality, education in Italy is compulsory from 6 to 16 years of age, and is divided into five stages: kindergarten (scuola dell'infanzia), primary school (scuola primaria or scuola elementare), lower secondary school (scuola secondaria di primo grado or scuola media), upper secondary school (scuola secondaria di secondo grado or scuola superiore).

Asilo (Kindergarten)

From the age of three to the age of six, children are sent to nursery school. This is non-compulsory, but most Italian families do send their kids 'all'asilo'. Children are looked after by two teachers per class, they play, start socialising and learn to recognize letters and numbers.

Scuola Primaria (Primary School)

Also known as 'scuola elementare', primary school lasts five years. The educational curriculum is the same for all students who are given a basic education in Italian, English, mathematics, natural sciences, history, geography, social studies, physical education, visual and musical arts.

There are three main teachers per class, plus an English language teacher who works with children across several classes.

Scuola secondaria (Secondary school)

Secondary education in Italy lasts 8 years and is divided into two phases: Scuola secondaria di primo grado (Lower secondary school), also broadly known as Scuola media, which corresponds to the Middle School grades, and Scuola secondaria di secondo grado (Upper secondary school), also broadly known as Scuola superiore or less formally as Le Superiori, which corresponds to the high-school level.




The scuola secondaria di primo grado follows primary school and lasts three years (roughly from age 11 to 14). The scuola secondaria di secondo grado lasts five years (roughly from age 14 to 19). There are three types of scuola secondaria di secondo grado:

Liceo (lyceum) - the education received in a Liceo is mostly theoretical, with a specialization in a field of studies, for example humanities, science, or art; less attention is devoted to technical-practical education. Currently, most of the curricula have a similar structure and some subjects in common (such as Italian literature, history and mathematics), while some subjects are peculiar to a particular type of course (for example ancient Greek in the Liceo Classico, or scenography in the Liceo Artistico).

Istituto tecnico - offering both a theoretical education and a specialization in a particular field of studies (for example economy, humanities, administration, law, technology, tourism.)




Istituto professionale - this refers to vocational schools preparing people for specific trades, crafts and careers. Some schools offer a diploma after 3 years instead of 5.

The following types of institution offer higher education in Italy:



-  universities (polytechnics included)
-  High level Arts and Music Education institutions (Alta formazione artistica e musicale - Afam)
-  Higher technical institutes (Its)

Universities are autonomous bodies; they adopt their own statutes, establishing their own governing bodies (such as the rector, senate, and board of management) as well as their teaching and research structures.

Universities issue the following qualifications, corresponding to the Bologna Process structure (cycles):

-  Laurea, corresponding to a first-cycle qualification, issued at the end of a three-year course of study (180 credits - CFU);
-  Laurea specialistica/magistrale, corresponding to a second-cycle qualification, issued at the end of a two-year course of study (120 credits - CFU) or to a 5-6-year single course (300-360 credits - CFU);
-  Dottorato di ricerca, corresponding to a third-cycle qualification.

In addition, universities may organise courses leading to the following qualifications:

-  Master universitario di primo livello (first-level University master). Courses are addressed to holders of a laurea and lead to a second-cycle qualification outside the Bachelor and Master structure.
-  Diploma di specializzazione (Specialisation diploma) and Master universitario di secondo livello (Second-level university master). Courses are addressed to holders of a laurea specialistica/magistrale and lead to a third-cycle qualification outside the Bachelor and Master structure.

The Afam institutions are the following: Academies of Fine Arts, the National Academy of Drama, Higher institutes for Artistic Industries (ISIA), Conservatoires, the National Dance Academy and officially recognised music institutes. Afam institutions have legal status and statutory, teaching, scientific, administrative, financial and accounting autonomy.

All qualifications are described in the NQF. Qualifications issued by universities and Afam institutions are also described in the Italian qualification framework of Higher education (QTI).

Each university or Afam institution establishes the organisation of the academic year. In general, the academic year starts on the 1st of November and ends on the 31st of October of the following year. In general, it is organised in two semesters.

Higher technical institutes (ITs) are highly specialised technical schools established to meet the demand of new and high level competences coming from the labour world, in particular from the technical and technological sectors.

ITs offer short-cycle non-university higher education, which is part of the education system since 2011/2012. Courses are accessible to holders of an upper secondary education qualification. In general, courses last 4 semesters and lead to the qualification of 'Higher technician' (Diploma di tecnico superiore).

Besides universities, Afam institutions and ITs, also other specialised institutions offer tertiary education in specific fields. In general, access to courses requires an upper secondary education qualification and an entrance examination. The number of posts available is limited and fixed annually. In some cases, also a previous relevant training is required. These institutes issue qualifications recognised within the education system and refer to national authorities other than the Ministry of education, university and research, therefore, the following articles do not describe the offer into details. Among the specialised institutions offering tertiary education there are: Scuola nazionale di cinema (National School of Cinema), Scuole di archivistica, paleografia e diplomatica (Schools for the archive systems, palaeography and diplomatics), Military academies (Air Academy of Pozzuoli, Revenue Guard Academy, Military Naval Academy of Livorno, Military Academy of the army of Modena), Istituti superiori di scienze religiose (Higher Institutes of Religious Sciences), the Foundation for the preservation and restoration of books.



Types of Higher Education Institutions

Universities (polytechnics included) and equivalent institutions, High-level arts and music education institutions (Afam) and Higher technical institutes (ITSs) are higher education institutions that issue first, second and third-cycle qualifications. ITSs only offer short first cycle courses.



A list of all institutions is available on the website of the Ministry of education, university and research (Miur). In addition, Miur has launched the portal universitaly.it that, beside the list of all institutions, provides all necessary information to access higher education in Italy.

University Education

University education is provided by 96 university institutes:






-  67 state universities (of which 9 are higher schools, or institutes, called 'special system higher schools');
-  29 non-state universities (of which 11 are online universities).

Finally, the following institutes issue qualifications equivalent to those issued by universities:

-  Higher schools for language mediators (Scuole superiori per mediatori linguistici, SSML) offering three-year courses and issuing qualifications equivalent to the laurea (first-cycle degree) on language mediation sciences released by universities;
-  Specialisation institutes for psychotherapists, issuing qualifications equal to the Specialisation diploma (third-cycle qualification) issued by Italian universities in the broader field of psychology.
-  Other institutes offering 5-year single-cycle courses leading to a qualification equivalent to a second-cycle qualification. Among them: the Higher institute for the conservation and restoration (Istituto superiore per la conservazione e il restauro) in Rome, the School of the Gemstone Factory (Scuola dell'Opificio delle pietre dure) in Florence, with its branch in Ravenna at the School of Restoration of the Mosaic (Scuola di restauro del mosaico), the Higher school at the Central institute for the pathology of books (Istituto centrale per la patologia del libro) in Rome. These institutes fall within the responsibility of the Ministry for arts and culture instead of the Ministry of education.

Higher technical institutes (ITS)

ITSs are specific types of foundations (half a way between associations and private foundations). The minimum organisational standards requirements foresee that ITSs should involve:

-  a vocational/technical upper secondary school, either State-funded or paritaria, situated in the same province of the foundation, which has the role of reference body and that issues the relevant qualification;
-  a training institution which has been accredited by the Region for the purpose of higher level training and situated in the same province of the foundation;
-  an enterprise belonging to the same productive branch of the ITS;
-  a university department or any other body belonging to the technological/scientific research system;
-  a local authority (municipality, province, extended urban area, etc).

The offer is available nationwide. At present, there are 63 ITSs.

First Cycle Programmes

First-cycle programmes are provided by universities, by High-level arts and music education (Afam) institutes and by Higher technical institutes (ITS).

Universities and Afam institutions offer first-cycle 3-year programmes corresponding to 180 Ects credits (CFU/CFA).

The study courses offered by universities and Afam institutes are designed to provide students with an adequate mastery of methods, a general scientific knowledge and artistic techniques, as well as the acquisition of professional competences in a specific study field.

At the end of the relevant three-year programme, university students are awarded a laurea degree, whereas Afam students are awarded a Diploma accademico di primo livello (first-level academic degree).

Higher technical institutes (Istituti tecnici superiori - ITS) offer short-cycle non-university tertiary education. Programmes have a duration of 4 semesters (1 800-2 000 hours).

Programmes at ITSs have the purpose of training high level technician with strong competences in new technological sectors that are strategic for the economic development and competitiveness of the country.

Programmes lead to the obtainment of a Diploma as Higher technician (Diploma di tecnico superiore).

Bachelor

Branches of Study

University Education

According to the National qualifications framework Bachelor university programmes (3-year courses corresponding to 180 credits - CFU) lead to the qualification called laurea.

Bachelor university programmes are organised in the sanitary, scientific, social and classical study areas.

Bachelor programmes do not include studies in medicine and surgery, pharmacy, veterinary science and dentistry studies, law, primary teacher education and architecture. In fact programmes in these fields of studies are organised in single-cycle courses (6 or 5 years, corresponding to 300-360 credits). These courses lead directly to a second cycle qualification (single-cycle laurea magistrale).

Each study area is made up of so called 'laurea classes'. One 'class' groups together more courses with the same core qualifying objectives and the same core activities established at national level for each class (e.g. the laurea course 'Labour consultant' and the laurea course 'Italian and European law', belong to the same laurea class (L-14) 'Juridical services sciences', included in the social area).

Classes, with the relevant core objectives and minimum amount of credits required, are established at national level for all universities. At present, laurea classes are 43. A complete list of laurea classes is available on a national database constantly updated.

Universities autonomously activate courses and regulate their organisation (course title, objectives, curriculum and relevant study activities, credits, final assessment procedures) in their own regulations.

Therefore, it is not possible to provide an in-depth picture of programmes and contents of each course.

Teaching regulations of study courses, establish the list of teachings; specific training objectives and credits; curriculum and requirements for the presentation of the individual study plans; provisions concerning any compulsory attendance.

The curriculum is the whole of the training activities (teaching courses, seminars, practical work and laboratory, didactical activities in small groups, tutoring, guidance, apprenticeship, projects, thesis, individual study activities and self-learning) the students has to carry out to obtain the qualification.

The knowledge of a language of the European Union is required to obtain the final qualification.

The official teaching language is Italian. However, many institutions offer both activities (seminars, conferences) and study courses or single subject courses in a foreign language (mainly English).

Teaching Methods

Universities and High level arts and music education (Afam) institutions, in their own regulations, should establish procedures to carry out teaching activities, in the respect of teaching freedom as well as of teachers' and students' rights and duties.

Teachers freely choose their own teaching methods. They can receive just some not mandatory indications. The use of new technologies is more and more widespread, as well as seminars, working groups, etc.

Progression of Students

Students are expected to obtain the credits foreseen in the study plan for each academic year, upon passing the scheduled exams. Students who do not pass the scheduled exams cannot attend courses foreseen for the following academic year.

In order to graduate, students are required to have passed all the exams foreseen by their study plan. If they have not, students are expected to fulfil their duty within the terms established by regulations of each institution.

Students holding a university or Afam first-cycle qualification, have access to the second-cycle programmes.

At present, teaching regulations of each institution lay down procedures and criteria to be followed when students ask to switch from one course to another within the same or different university, or from a university to an Afam institution and vice versa. Regulations can provide for monitoring the acquired credits in order to check if the students' knowledge is not obsolete. As for the switch from one course to another or from one university to another, teaching regulations must guarantee the recognition of the possible highest number of credits obtained by the student. In the case of switch within the same class of studies, the recognition of credits must not be lower than 50%. The non-recognition of credits must be adequately motivated.

Certification

University and Afam students, who have completed a three-year programme, have been assigned the corresponding 180 CFU/CFA and have successfully passed the final test, are awarded a laurea or a Diploma accademico di primo livello (First level academic diploma) respectively.

The university rector and the Afam institution director, who represent the university and the Afam institution, are responsible for the qualifications issue. University titles have academic value and do not qualify to work freelance in one of the regulated professions; instead, they give access to the qualifying State exam required to enrol in the relevant register.

University and Afam institutions, in their teaching regulations, establish methods and procedures to issue both the certification and the Diploma supplement, in compliance with the models adopted in the European countries, providing the main information on the curriculum followed by the student to obtain the certification concerned.

According to specific agreements, the institutions can release qualifications together with other Italian and foreign institutions of the same level, qualified to issue qualifications recognised in Italy according to the international and European community law (joint qualification).

Short-Cycle Higher Education

Branches of study

Higher Technical Institutes (ITS) offer highly qualifying courses in the following 6 technological areas: energy efficiency, sustainable mobility, new technologies in life, new technologies for the 'made in Italy', innovative technologies for arts and cultural activities - tourism, ICT.

Admission requirements

Anyone (adults included) holding an upper secondary education qualification, can enter to courses offered at the Higher Technical Institutes (ITS).

ITSs organise enrolment tests to assess candidates' basic technical and technological competences as well their knowledge of English, required to participate successfully in training activities offered. Assessment criteria are defined by each ITS.

In addition, candidates obtain a specific mark according to the final mark obtained at the end of the upper secondary school.

Curriculum

Courses at Higher Technical Institutes (ITS) last 4 semesters corresponding to 1 800/2 000 hours and, for specific branches, up to a maximum of 6 semesters. Courses have a modular organisation. The duration of each module varies.

Curricula foresee the acquisition of general basic competences, common to all technological areas, technical competences, common to all professional qualifications of each technological area and competences specific of each professional qualification. In particular, general basic competences refer to the following areas: languages, communications and public relations, science and technology, law and economics, organisation and management.

Courses include theoretical lessons and labs; 30% of the overall timetable should be destined to on-the-job training, (also abroad).

Teaching methods

The freedom of teaching is a principle established by the Constitution of the Italian Republic and, therefore, teachers are free to choose their own teaching methods.

In ITSs courses, 50% of teachers come from enterprises or from specific professions.

In general, 'learning by doing' is the most common teaching methods. It is also common the use of labs at research centres, universities and companies.

Moreover, courses foster the integration of common with technical-vocational competences, in problem solving, planning, administration and control of systems/services in the relevant area of studies. Some teachings are held in English.

Progression of students

In general, have a modular organisation. Therefore, students do not progress from one grade to the next one as they do in the school system.

The final certificate diploma di tecnico superiore (Diploma of Higher technician), delivered at the end of the whole course, upon passing the final exam, allows the access to public competitions and university courses, with the recognition of the credits obtained into CFU.

Certification

At the end of courses, upon passing the final exam, students receive the Diploma di tecnico superiore (Diploma of higher technician). The certificate should indicate the technological area and the relevant national qualification.

Certificates are issued by the upper secondary school, either technical or vocational, which is the reference institute of the ITS foundation.

The Diploma gives access to public competitions and to university courses with the recognition of credits obtained into CFU, as well as to the labour market.

Second Cycle Programmes

Second cycle programmes are provided by both universities and High level arts and music education (Afam) institutes.

Second cycle programmes can last either two years, corresponding to 120 Ects credits (CFU/CFA) or, in the case of single-cycle programmes, 5-6 years corresponding to 300-360 credits.

At the end of the relevant second cycle programme, university students obtain a laurea magistrale degree, whereas Afam students obtain a Diploma accademico di secondo livello (second level academic diploma).

The study courses offered by universities and Afam institutions are designed to provide students with advanced competencies for highly qualified activities in specific sectors as well as the acquisition of high-level professional competencies.

Branches of Study

University Education

According to the National qualifications framework for higher education, both two-years and single-cycle university second-cycle programmes, lead to a laurea magistrale degree.

Studies are organised in the following study areas: sanitary, scientific, social and classical area.

Each study area is made up of courses and of so called 'laurea magistrale classes'. One 'class' groups together more courses with the same core objectives and the same core activities established at national level for each class (e.g. the laurea magistrale course 'Visual arts' and the laurea magistrale course 'Historical heritage', belong to the same class (LM-89) 'History of arts', included in the classical area). Universities decide to activate or not the courses within the various classes; their decision will be taken in the respect of their academic history and tradition as well as according to the labour market requirements and international competition.

Classes, with the relevant core objectives and minimum amount of credits required, are established at national level for all universities. At present, laurea magistrale classes are 94. A complete list of classes is available on a national data base, regularly updated.






Studies in medicine and surgery, pharmacy, veterinary science and dentistry studies, law, primary teacher education and, only for a few courses, building engineering-architecture, have a single-cycle organisation (6 or 5 years, corresponding to 300-360 credits). These courses lead directly to a second cycle qualification (single-cycle laurea magistrale).

Universities autonomously activate courses and regulate their teaching organisation (course title, objectives, curriculum and relevant study activities, credits, final assessment procedures) in their own regulations.

High Level Arts and Music Education (Afam)

According to the National qualifications framework for higher education, second cycle Afam programmes, which correspond to 120 Ects credits (CFA), lead to a Diploma accademico di secondo livello (second level academic diploma).

Afam institutions offer highly qualified specialisations in:

-  visual arts (painting, sculpture, decoration, set designing photography, multimedia, new technologies for arts, film and TV set designing, preservation and restoration of modern and contemporary works of art)
-  drama (acting and direction)
-  dance (classic and contemporary dance, choreography)
-  music (all instruments, jazz and electronic music)
-  design (product design, communication, system and fashion design)

Admission Requirements

University Education

Central regulations establish the general requirements to access university courses.

Admission is restricted for single-cycle courses in medicine and surgery, pharmacy, veterinary science and dentistry studies, primary teacher education and architecture; admission is also restricted for courses in health professions or for courses for which study plans foresee practical training and the use of laboratories. The selection of courses with limited admission takes places in Italian. In case of medicine and surgery courses, which teaching language is English, the selection for the admission is held in English

Access to courses requires a laurea (first cycle qualification), or another equivalent qualification obtained abroad. To access single-cycle programmes an upper secondary school leaving certificate, or another equivalent qualification obtained abroad, is required. Each university, in its own regulations, establish specific admission criteria including the possession of certain curricular requirements and the verification of each student's preparation. All credits obtained in the previous cycle (180 CFU) will be recognised if the second cycle course is fully consistent with the contents of the completed three-year degree course; otherwise, the students will be enrolled with a 'debt' (debito formativo).

Single institutions decide on the acknowledgement of qualifications obtained abroad for the admission to courses, in coherence with European Union directives and regulations as well as with international agreements in force.

Certification

University students, who have completed a second cycle programme, have been assigned the corresponding 120 CFU credits (or 300-360 for single-cycle programmes) and have successfully passed the final test, obtain a laurea magistrale. Under the same circumstances, Afam students obtain a Diploma accademico di secondo livello (Second level academic diploma). The university rector and the Afam institution director, who represent the university and the Afam institution, are responsible for the qualifications issue. University titles have academic value and do not qualify to work freelance in one of the regulated professions; instead, they give access to the qualifying State exam required to enrol in the relevant register. University and Afam institutions, in their teaching regulations, establish methods and procedures to issue both the certification and the Diploma supplement, in compliance with the models adopted in the European countries, providing the main information on the curriculum followed by the student to obtain the certification concerned. According to specific agreements, the institutions can release qualifications together with other Italian and foreign institutions of the same level, qualified to

issue qualifications recognised in Italy according to the international and European community law (joint qualification).

Third Cycle (PhD) Programmes

Both universities and High level arts and music education (Afam) institutes organise third-cycle programmes, lasting a minimum of 3 years. Courses aim at providing the competencies required to carry out highly qualified research activities. University third-cycle programmes lead to a Dottorato (PhD), while Afam programmes lead to a Diploma accademico di formazione alla ricerca (research academic diploma). Beside the above-mentioned programmes, universities and Afam institutions also offer further courses, leading to qualifications falling outside the Bachelor and Master structure. Organisation of Doctoral Studies Doctoral studies are offered in all areas and sectors of study and research. Courses, as well as institutions hosting the courses, should have the accreditation from the Ministry of education, university and research (Miur), upon advice National agency for the evaluation of the university and research system (Anvur). Universities and any Italian institution of advanced training and research can submit for accreditation. Accredited institutions establish, in their own regulations, the access requirements to courses, methods to obtain the final qualification, learning objectives and programmes, length of courses, fees, the number of fellowships available, methods for awarding grants and their amount. Courses can also be organised through consortia and agreements with other public and/or private, Italian or foreign universities and research institutes (international doctorate) and with enterprises involved in research and development (industrial doctorate). However, qualifications are always issued by university institutions. High level arts and music education institutions (Afam) offer third-cycle courses called equivalent to university PhDs. Courses are organised in all areas and sectors of high level arts, music and dance education. Afam institutions can offer third-cycle courses also through consortia and agreements with other Afam institutions, universities and other public or private, Italian or foreign institutions. Both university and Afam third-cycle courses have a minimum length of 3 years.

Admission Requirements

Access to third-cycle programmes at both universities and Afam institutions requires passing a public competition. To access the public competition for university third-cycle programmes, a second-cycle qualification (laurea magistrale), or other equivalent qualification obtained abroad, is required. Access to the competition is open also to those who, at the date of the competition, do not have the qualification required. However, in case of positive outcome, they should get the qualification within the 31st October subsequent to the competition. The call should be in both Italian and English and be published on the website of the institution offering the doctoral course, on the ministry of education website and on Euraxess. Moreover, the call should indicate the number of available posts, access requirements, assessment criteria, tests (written and/or oral), grants available and costs for future PhD students.

Access the public competition at Afam requires a second-cycle qualification, attained at an Italian or foreign university or Afam institution. The call for the selection should be published on the Official Journal, and the Miur should be informed. The call should indicate the number of available posts, tests, the number of grants available and their amount.

Status of Doctoral Students/Candidates

Doctoral students have the status of university full time students with and exclusive engagement with the institution. During doctoral studies, students can carry out tutoring and, within the limit of 40 hours/year, teaching activities. In case a student is also a civil servant, he/she has the right to unpaid leave for the official duration of the course (e.g. if the course has an official duration of three years and the student needs one more year to finish his/her studies, the fourth year is not covered by the leave). Female

students have the right to maternity leave. Students receive yearly grants renewable upon fulfilment of all activities foreseen in the study plan of the previous year. Grants have a minimum amount established nationwide through Ministerial Decree. The amount can be increased to cover additional costs for research activities to be carried out abroad. Grants covers also social security costs.

Italy has faced the challenge of integrating different levels of lifelong learning systems into a coherent national qualification system. The context for designing and awarding qualifications is complex: it is governed by multiple legislative acts under different regional and national authorities. The comprehensive NQF adopted in January 2018 represents the main tool for the description and classification of qualifications awarded within the national and regional system and for referencing Italian qualifications to the EQF (https://www.cedefop.europa.eu/files/italy_-_european_inventory_on_nqf_2018.pdf) .

Inspired by the principles of the EQF, the objectives of the Italian national framework include (Italian Government, 2018): (a) to improve access, transparency and permeability of the qualifications system; (b) to promote the currency of qualifications at national and European level, including in terms of geographical and professional mobility; to promote the centrality of the person and the value of individual experiences, including through validation and certification of competences acquired in non-formal and informal contexts, and those acquired through work-based learning; to contribute to the quality of education and competences acquired by individuals for personal, civic, social and professional growth .

The Ministry of Education, University and Research is responsible for qualifications awarded in general and higher education, while the regions and the Autonomous Provinces of Trento and Bolzano are responsible for VET qualifications. The Ministry of Education, University and Research and the Ministry of Labour and Social Policies have been leading developments in EQF-related processes, in agreement with the regions, autonomous provinces and social partners, as laid down in several agreements. In January 2018 a comprehensive Italian NQF was adopted through an inter-ministerial decree. The decree regulates the procedures and criteria for allocating qualifications to NQF levels, a process coordinated by the National Agency for Active Labour Policies (ANPAL) and carried out in cooperation with the National Institute of Public Policies Analysis (INAPP), which acts as an independent evaluator for levelling and referencing



ESSA-SPORT

Improving the Supply of Skills to the Sector

6

NATIONAL SPORT EDUCATION AND TRAINING SYSTEM



6. NATIONAL SPORT EDUCATION AND TRAINING SYSTEM

Presentation of the education and training systems as well as the supply/training provision for sport and physical activity.

Two hours of PE per week are compulsory in Italian primary and secondary schools. Active transport to school is encouraged, using the PIEDIBUS scheme. This “walking bus” allows students to travel to school on foot, accompanied by adult volunteers, in an organized fashion. It primarily serves to replace private cars as a means of travelling to school, but it can also replace public transport and school buses. The PIEDIBUS has a set route, regular “stops”, conductors (just like on a standard bus), a route leader and other escorts, and the way is marked by warning signs for motorized vehicles. It is designed primarily for use by schoolchildren who are too young to walk to school independently. The scheme is run by the municipalities, local health authorities, schools and parents’ associations (usually in cooperation).

Already in the primary school, the children can join physical education and introductory sports activities that are free and elective. They are supported through the funding for the widening of educational offerings. In the secondary school, sports activities are well structured and are supported through the special funding from the Ministry of Education and the Regional School Offices for the widening of educational offerings, allowing students to train and prepare for competitions in the various sports selected. This is done through the teachers of physical education assigned to the school or involving teachers of other schools. Forms of sport integration are organised for disabled students (Eid, Lovecchio, Bussetti, 2012).

Italy uses the international cut-off point for children and adolescents reaching the recommended physical activity levels, as endorsed in WHO’s *Global recommendations on physical activity for health* (2010) (5). The national data from 2010–2013, collating together the data for children and adolescents, show that 43% of children and adolescents (6–17 years) meet the WHO recommended physical activity levels (see Table below), with more boys (46%) being physically active than girls (44%).

%	CHILDREN AND ADOLESCENTS (6-17 YEARS)
MALES	46
FEMALES	44
BOTH SEXES	43

Source: Ministry of Health PASSI, 2013 (3).




Both for sport and sport related occupations the access to the profession is not regulated by law, with the exception of skiing instructors, mountain guides and few other operators (law 91/81). In order to operate as a coach in a club belonging to the sport movement or in a Federation, a qualification from a National Federation is generally required. Therefore, excluding the internal training path of each Nsf, there are not specific procedures for certifying qualifications and skills in connection with the public system of general education and vocational training.

In the 80's and 90's the Italian National Sport Federations and CONI (the Italian National Olympic Committee) which governs them, achieved significant successes in terms both of top competitive performance and general sport participation. The Italian Sport System has been therefore considered for a long time as one of the most effective in the world. With the support of an excellent financial situation, this was mainly the result of the skilled action of a large number of coaches whose effectiveness was more the outcome of practical experience, rather than the result of training and specific education. Currently the conditions of success of this model have been weakened, if not totally neutralized, so that an increasing consensus is rising on the need to re-engineer its basic elements, including the training system for coaches.

As a consequence of the changes in the environment of sport organizations (i.e., growing commercialization, privatization, marked organizational competition), it is clear that, to enhance the quality of the actions of the National Governing Bodies in sport, as is the case of the Federations, a new conception of the training of human resources must be worked out, particularly if we consider the explosion of the academic and private vocational training opportunities in the sector.

For these reasons CONI delivered in May 2001, for the first time in Italy, a National Training Framework for Sports Coaches (Piano Nazionale di Formazione dei Quadri Sportivi). This Framework was based on the previous experience of the NSFs and "CONI-Scuola dello Sport", in the domain of training sport coaches, which in the past has produced not only courses but also some innovative and

fruitful research, experimentation, documentation and training initiatives, which nevertheless were not fully generalized in all the Federations. So this System represented the effort to harmonize education and training systems in the NSF, and the way to solve some problems, such as:

-  Differences between the ET System of the National Federations (in quality and volume of education, number of levels, ecc.)
-  Differences in the general (sport science) and specific (sport knowledge) ratio
-  Differences in the theory / practice ratio

Old teaching methods The National Training Framework sets up for the first time a general model for all the NSF in Italy and an intentional relationship to the most popular and advanced European framework in the sector, which has been worked out in the last years by ENSSEE (European Network for Sport Sciences Employment and Education). It was a five levels model, built up coherently with the general European framework for vocational training. The first four levels were managed within the NSF-CONI system; the fifth organized and certified independently at the academic level. Even if there is no European official regulation concerning such domain, the European Union has strongly sustained the convergence of the training system at the national level, in order to give a real support to the freedom of circulation for professionals in this sector. In spite of this apparently restricted goal, the impact on the general training for volunteers coaches' has been significant in Italy, but in the years some other changes created the need to update the National Training Framework. So, after some actions carried out from CONI, whose timescale is described in the fig.1, in the year 2009 was delivered, from CONI, the ITALIAN QUALIFICATION FRAMEWORK FOR SPORT COACHES (Sistema Nazionale di Qualifiche per tecnici Sportivi- S.Na.Q.).

There are multiple training providers active in the field. The role of the Regions is increasing since they have by law the competency for vocational training, with an increase of training programs and regulations at the regional level. 37 Universities are also active in the field, delivering bachelor's degrees in sport science and master degrees in sport management, adapted physical education and sport coaching, normally with limited impact on the labour market. Private bodies, including professional associations are also active in the training market (e.g. diving, sailing, golf, etc.).

In order to operate as a PE teacher a University master's degree is required, plus one year of teaching training (3+2+1). Physical Education teachers generally gained also have additional competences by attending short training courses provided by the sports organisations and National Federations. It must be highlighted that the procedures to get access to a role in the school are, at the moment, under revision.



ESSA-SPORT

Improving the Supply of Skills to the Sector

7

FINDINGS FROM THE EMPLOYER SKILLS SURVEY

7. FINDINGS FROM THE EMPLOYER SURVEY

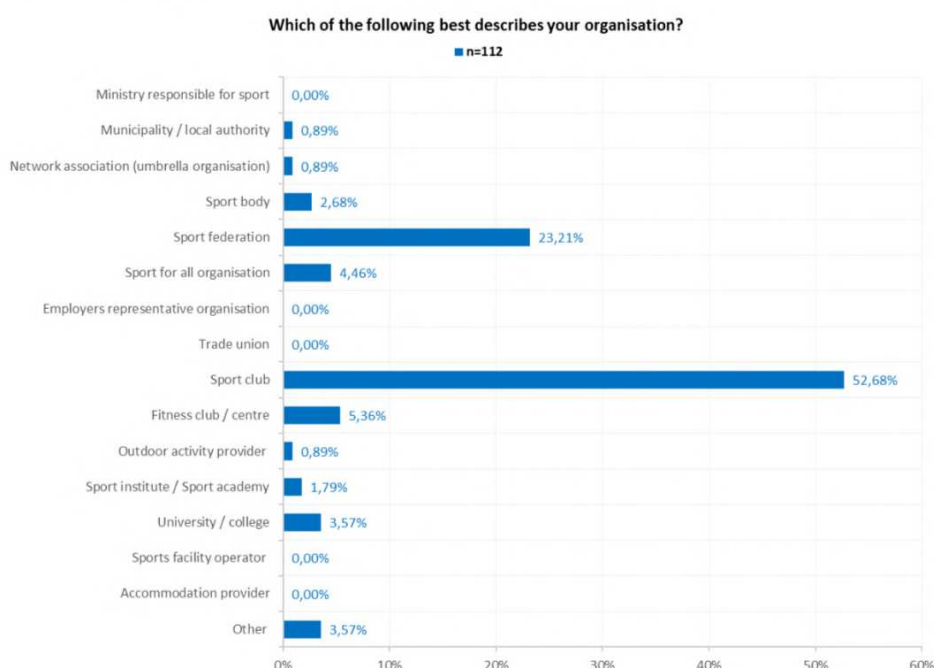
Analysis of the national results from the online employers' survey on skills needs in the sport and physical activity sector (e.g. skill needs, gaps and shortages, tendencies, perspectives)

The collection of the data at national level was conducted through a double approach. Firstly, in accordance with the overall research strategy, a call for participant was disseminated through a database of 2000 sport organisations operating in Italy. Secondly, direct contacts were established with sport organisations that were eligible as respondents.

The 112 respondent organisations represent a valuable purposive sample that gives an interesting insight about the tendencies and the perspectives of the sport employment market in Italy.

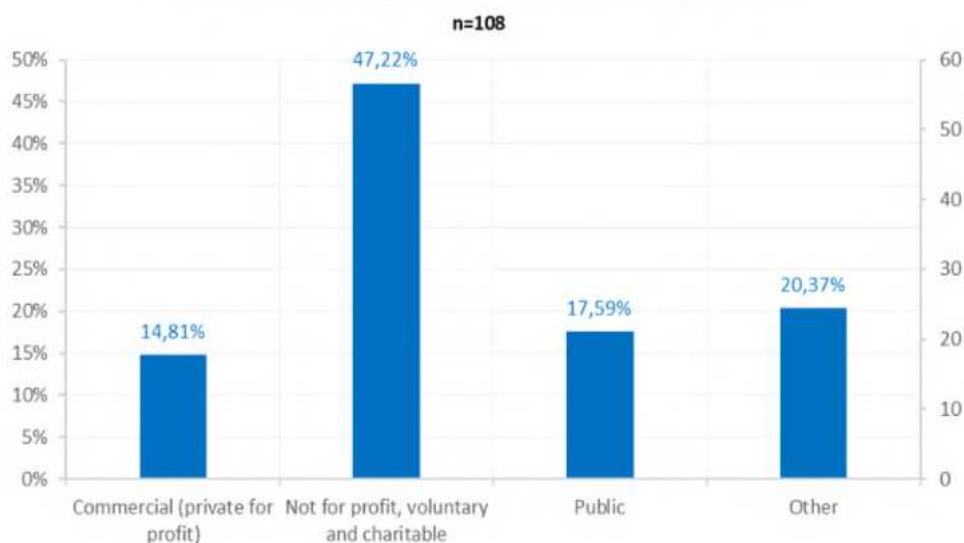
Below, some of the most interesting data derived from the employer survey are reported in detail.

a) Type of organisations

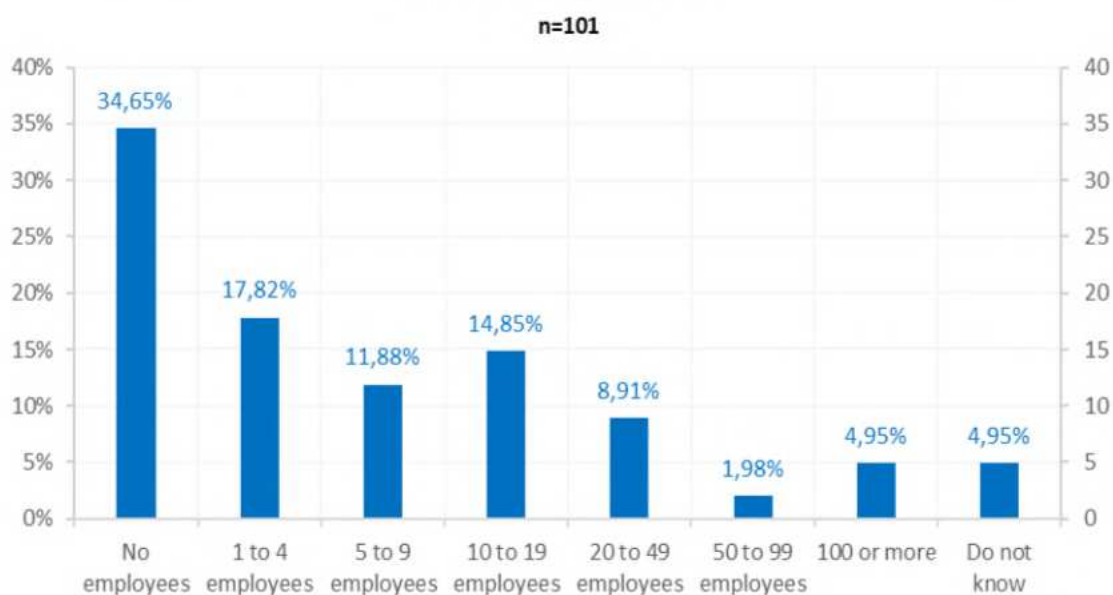


The configuration of the sample is bounded with the approach adopted for the collection of the data. UNICAS research group had direct contact with sport clubs and Federation that were invited to complete the questionnaire. In addition, UNICAS sent out a call to a vast number of organisations operating in the sport sector.

Which of these categories best describes your organisation?



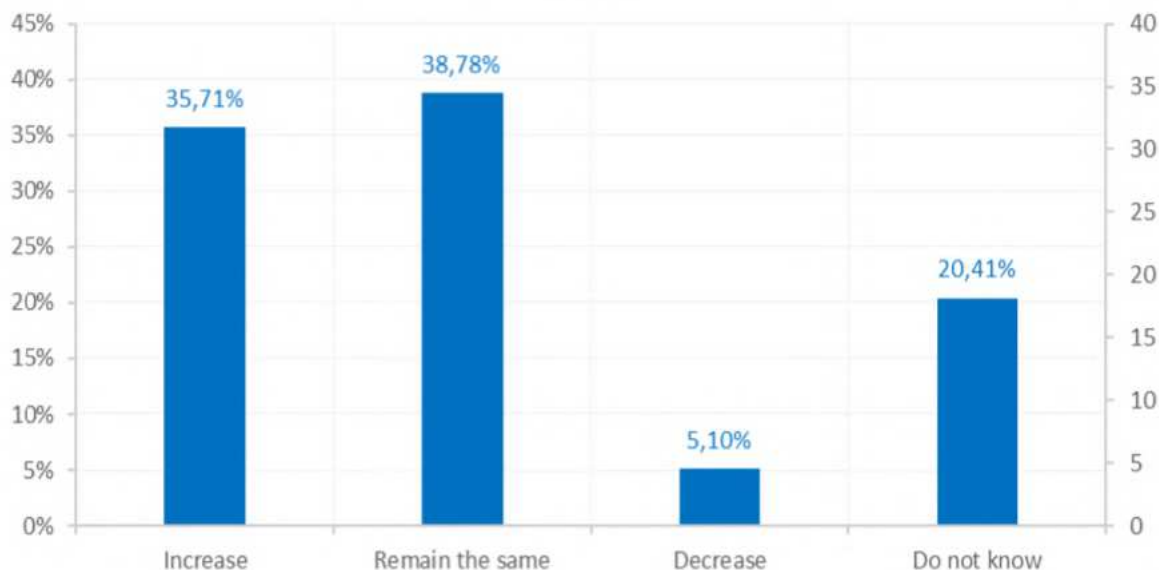
Approximately how many paid employees work in your organisation on average in a typical year?



Respondent organisations reported their opinions about the tendencies concerning the workforce in the next two years. Only the 5% of the organisations believe that there will be a decrease in the number of people of their staff. On the contrary, the majority maintained that it will remain the same (38%) or it will increase (35%).

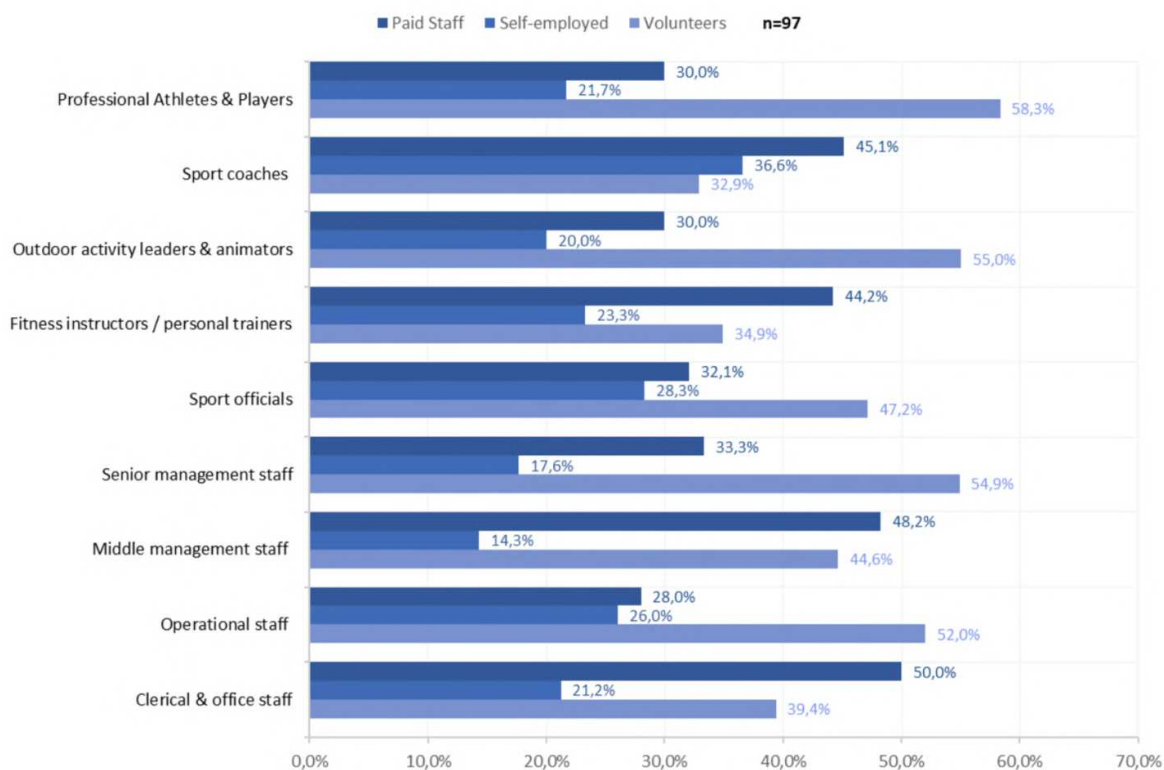
How do you think the size of the workforce in your organisation will tend to change over the next 2 years?

n=98



Volunteers still represent the backbone of sport organisation (see graph below). They are engaged in different roles across a wide range of tasks.

Which of these occupations are engaged in your organisation? Breakdown by type of contract



It is now worth noting the data concerning the weakest skills for each occupation. The two most selected are reported for each occupation:

Sport coach: organise activities and events; Ability to work with people with disability;

Outdoor activity leader: provide appropriate feedback; ICT skills;

Fitness instructor: understand participant needs; use of technology; marketing and selling skills;

Sport official: use of technology; apply the rule and the law of the sport;

Senior management staff: leading change; strategic thinking; business development skills;

Middle management staff: leading change; strategic thinking;

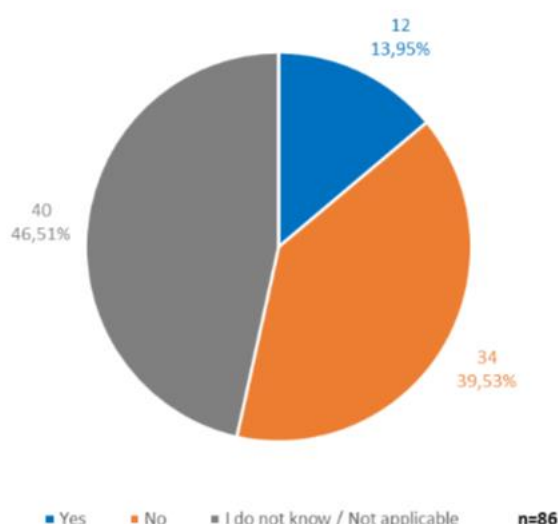
Operational staff: use of technology; communication skills; team working skills;

Office staff/receptionist: communication skills; problem solving skills.

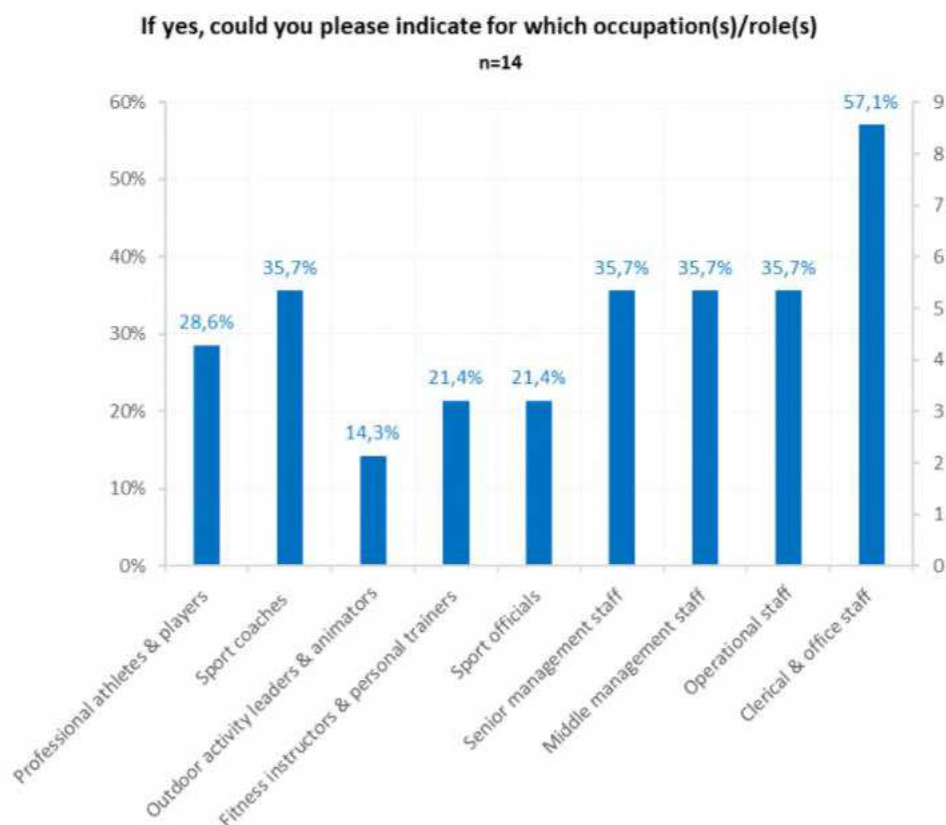
The recruitment of the staff does not represent a difficulty for the organisations (n=86) that completed the section of the questionnaire "Recruitment of the paid staff and volunteers".

b) Difficulties recruiting paid staff

When you recruit paid staff do you have vacancies that are difficult to fill?



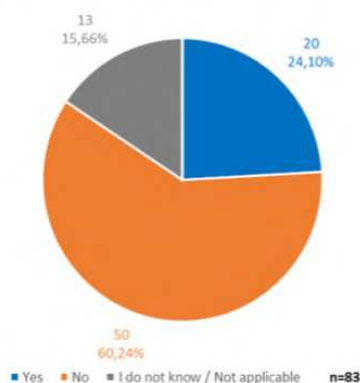
For what concerns the competences and the skills of the volunteers, the 74 respondent organisations that declared to have them as part of their staff, the opinion about the quality of the performance offered is relation to what is required to perform is high. Regarding the sport coaches and the sport officials the skills are rated at the level 5 in more that the 35% of the cases.



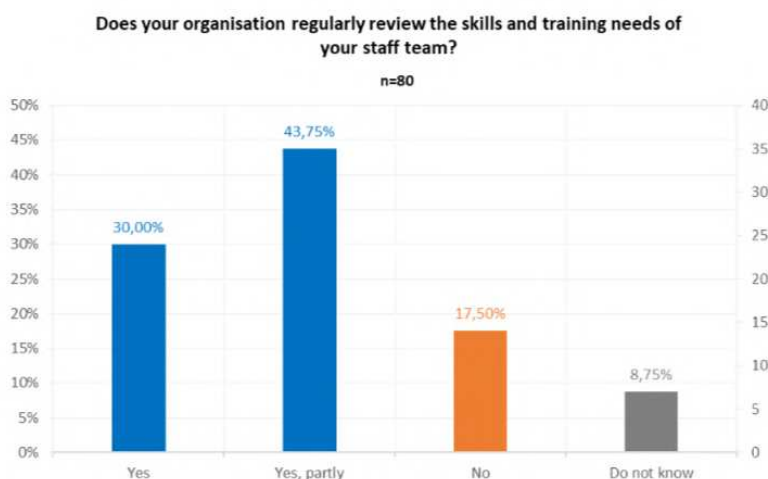
The engagement of the volunteers does not represent a particular problem. The contribute of the volunteers is still today the backbone of many sport organisations in Italy.

e) Engaging volunteers

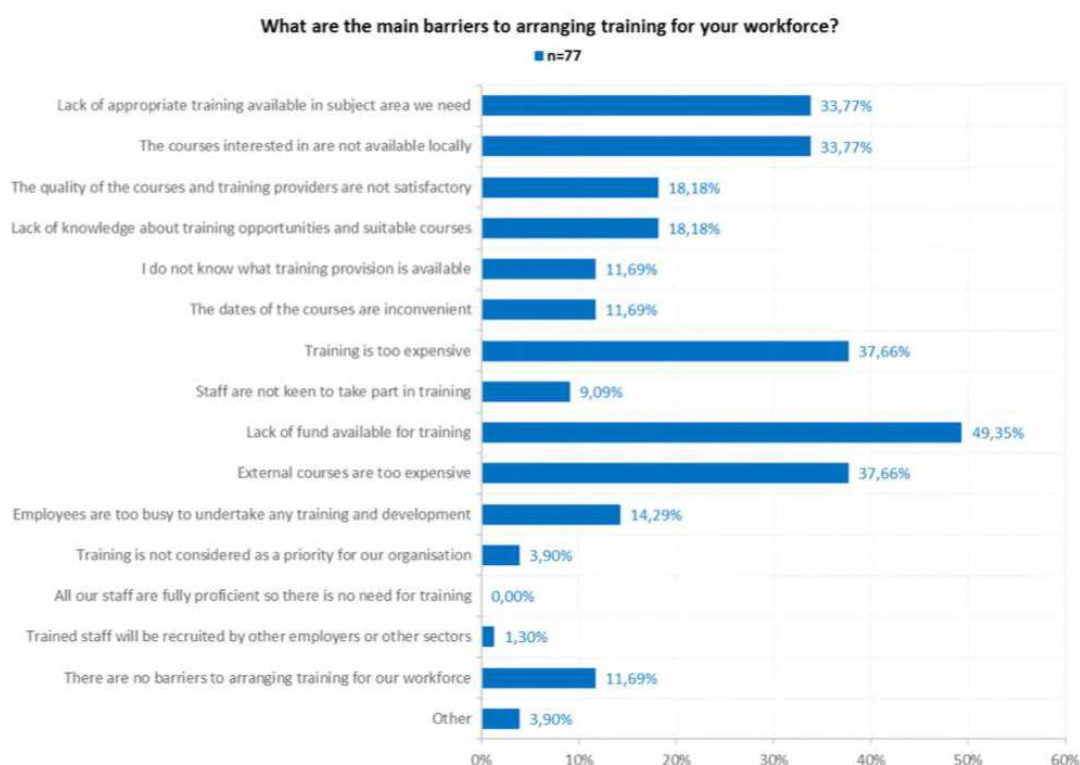
Does your organisation have any particular problem in engaging volunteers?

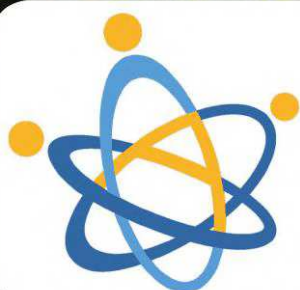


The respondent organisations seem to pay the due attention to workforce development and training. Only a small part of them (n=12) does not regularly review the skills and the training need of the staff.



However, the lack of funds still represents one of the main barriers to arranging training for the workforce.





ESSA-SPORT

Improving the Supply of Skills to the Sector





8

REPORT ON NATIONAL CONSULTATIONS

8. REPORT ON NATIONAL CONSULTATIONS



Presentation of the activities of consultation carried out in your country, the main items discussed and overall feedback received from national stakeholders.

The first phase of the national consultation saw the establishment of a group of national stakeholders coordinated by the University of Cassino and Southern Lazio UNICAS. For the engagement of the members of the groups the UNICAS research group activated its national, cross-sectorial network of organisations, both private and public, that have a role in the policy and the activities concerning the sport sector in Italy. Through bilateral contacts and informal/formal meeting the UNICAS research group selected 15 organisations on the basis of the following criteria:

-  willingness to offer regular contribute to the activities of the consultation group;
-  expertise in the field of sport in Italy and in Europe;
-  sufficient time to participate in all the meetings;
-  a balance among private and public organisations and good representativeness of a large number of sub-sectors.

After the bilateral talks, the UNICAS research group sent to the potential candidate an official invitation to better clarify contents and goals of the planning process and to invite participants to the scheduled meetings.

There were organised 3 meetings in total:

-  1 skype conference (16/01/2019)
-  2 round table meetings (05/02/2019; 30/04/2019).

Below is reported the list of the organisations that take part in the consultation:

-  Regional National Olympic Committee;
-  Regional Golf Federation;
-  Italian Union of Sport for All;
-  Italian Federation of Fitness and Aerobics;
-  FCA - Cassino;
-  Frosinone Calcio;
-  University Sport Federations;
-  Sporting Club;
-  Regional Volleyball Federation;
-  Italian Federation of Referees;
-  Municipality of Cassino;

In the first phase, the national consultation group offered the a valuable contribute for the dissemination of the employer survey at national level. After the conclusion of the collection of the data, the group was also required to offer a contribute to the analysis and the interpretation of the main statistics produced during the implementation of the ESSA-sport. In particular, the national consultation group informed the development of the recommendations that are fully described below.



ESSA-SPORT
Improving the Supply of Skills to the Sector



9

**NATIONAL
CONCLUSIONS**

9. NATIONAL CONCLUSIONS

Presentation of key findings and conclusions for your country from the entire ESSA-Sport project

In Italy, the sport sector creates about the 1.6 per cent of the Gross Domestic Product (CONI, 2012), which includes three per cent of the satellite activities (BNL, 2013). The private sector plays a crucial role with an economic contribution that can be estimated in 53.2 billion euros (CONI, 2012). A rather similar figure is reported by a European study conducted by the Austrian Institute for Sports Economics (SpEA, 2012). In this study sport represented 0.76 per cent of the Italian Gross Value Added and provided employment to 239,881 people, relative to the Vilnius' narrow definition of sport (i.e., all products and services that are necessary as inputs for producing sport as an output). These figures rise to 1.21 per cent and 329,860 people respectively when sport activities and services are defined according to the Vilnius' broad definition of sport (i.e., all product and services that have a direct or indirect relation to sport without being necessary to do sport) (SpEA, 2012). Sport is, thus, an important sector for the Italian economy. It also represents an important opportunity for the creation of thousands of jobs.

With some exceptions, sport organisations in Italy tend to have a small size configuration and a limited number of employees. A standard model of the organisation size determination (see e.g. Lucas, 1978) suggests that the reason for organisation being small is that their managers have low entrepreneurial ability. This model can be used to partially explain the Italian situation: an efficient training and education system focussing specifically on the managerial area was in fact not developed until the mid-1990's. However, other factors can also be considered: the fragmentation of the system is certainly an element that influences directly the size of the organisations. The fitness sector for example, is typified by a large number of small and medium organisations that provide their services to a limited number of customers (Madella & Digennaro, 2009). We believe that the crisis of the sport system during the 1990's, followed by the economic recession in 2008-2013, have forced organisations to reduce their sizes to survive with limited resources.

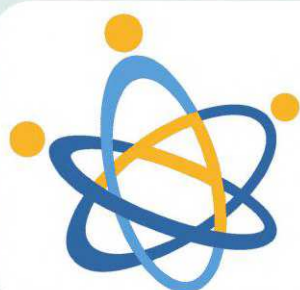
In the last decades, Italians have changed their relationship with sport and physical activity. The numbers of sports practitioners have indeed increased considerably in all age groups, in both genders and in all regions. From 2013 to 2016 (+ 4.2 points), 2 million and 519 thousand Italians approached the sporting practice. Overall, the active population in Italy is composed of 35 million 593 thousand individuals who perform one or more sports or some physical activity in their free time (Istat 2017). In specific, a long-term tendency to participate more in sport seems to emerge: in 1982 the share of participants aged over 6 was only 15.4 percent. This increase affects both men and women and, although in a differentiated manner, all age groups. Nevertheless, the number of sedentary citizens remains very high over time: after a decrease between 2006 and 2010 (from 42.0 % to 38.8 %), since 2010 the share of inactivity is stable at around 39 percent. According to ISTAT (2017), in 2015 there were 20, 2 million people aged over 3 practising one or more sports (34.3 % of the population) in their spare time, of which 24.4 percent with continuity and 9.8 percent occasionally. On the other hand, the 26.5 percent of the population, while not practicing a sport, carry out physical activities such as walking, swimming, cycling or others (15.64 million). The inactive people are 23,05 million (39.1 % of the population).

The attitudes to participate in sport are not homogeneous across the different regions of the country. This is also due to a different availability of organized structures, habits, and cultures. In the North-East there is the highest rate of people practising sport (40.4 %), followed by the North-West (39.5 %) and the Centre (35.3 %). In the South and in the Islands the rate of sport participation is 26.2 percent. The participation in sport is the highest for the group age 11-14 (70.3 %, of which 61 % regularly and 9.3 % occasionally) and tends to decrease with the age.

In 2016, the total number of people employed under the ISCO code 3 423 (Fitness and Recreation Instructors and Programme Leaders) were 57 667 (8 602 as second occupation). Over 100,000 employees are estimated working in almost 35,000 businesses linked to the entire sport sector. From 2008 to 2015, the number of employees in the sport sector increased by four percent in the sector of services, which also includes gym and fitness activities. In 2013 the Italian sport industry achieved an added value estimated at 4,5 billion euros and a total turnover of 14 billion (ISTAT, 2017).

The current skills policy about many sport occupations is centred on the need to drive up qualification obtainment and make the system more employer-led. More and more individuals with a university degree in sport sciences work in the sector. However, they also have a refinement of their skills and knowledge through vocational training (VT) provided by private training providers. In the drive to make the workforce skills adaptable to the changes of the sectors, the VT system is more 'demand-led' with the view to more actively engage individuals in developing and deploying skills to meet business priorities in the fitness industry. In this light, many major employers allocate significant resources to developing staff at the outset of their employment in order to deliver against the expectations of their membership base (Digennaro & Borgogni, 2017). During the last ten years many regions in Italy have adopted a specific law on sport that are partially reshaping the sport labour market.

The weakness of the sector is represented by the high proportion of part-time employment. Still a high rate of people is employed on a casual or part-time basis. The sector sees also a consistent proportion of the workforce falling into the black economy as also explained by the difference between official data and unofficial inferences. The State has acted to contrast this issue by introducing forms of job contracts giving special benefits to a part of the sport occupations (coaches falls entirely outside the scope of taxations with annual salary up to 10,000 euros).



ESSA-SPORT

Improving the Supply of Skills to the Sector

10

**NATIONAL ACTION PLAN
AND
RECOMMENDATIONS**

10. NATIONAL ACTION PLAN AND RECOMMENDATIONS

National Action Plan highlighting recommendations and priority actions for your country.

The following recommendations were agreed during the last meeting of the national consultation group coordinated by UNICAS. They were further refined by UNICAS in connection with the analysis of the data that were conducted in May 2019. However, a final validation was implemented through an on-line consultation with the national stakeholder group.

It was agreed by the group to write the recommendations in a narrative way with the view to make them more understandable for a large audience. Thus, a full description of the agreed recommendations is reported below.

a) Gender gap

In the near future (3-5 years) there is the need to increase and strengthen the female occupation in the sector. Female workforce in sport is underdeveloped if compared with the other European country. The employment of the women must be facilitated (through specific aid from the State and the Regions, for instance) with the view to reduce the gender gap and stimulate a further growth of the sector.

b) Employability with non-sport organisations

Support the employability of the people having a sport occupation with non-sport organisations must be a priority. It is clear from the statistics and the trends that people with a sport occupation are more and more required to work with non-sport organisations. This is due to the tremendous change the sport sector is facing in terms of services provided, use of new technologies, use of sport in the society, etc. etc. In the light of this, the role and the function of those people having a sport occupation must be made more attractive also for those organisations that do not operate, directly, in the sport sector. This will be possible with, among the other things, a reinforcement of their skills and competence and a close collaboration between the training providers and the employers.

c) Funds for the training of the sport workforce

There is the need to locate more funds (both private and public) for supporting the training of the workforce and the improvement of the skills and the competences of the employees that already work in the sector. There is, in fact, the need to foster their capacity to respond to the multifaced requests that is emerging from the sector (e.g. new customers' needs, new technologies, etc.) and from those organisations whose main business is not sport.

d) Enhance the quality of the work

Many occupations in the sport sector are fragile and volatile. There is the need to reduce the rate of involuntary part-time job, especially for women, through policies at national and regional level that stimulate the employability in this important sector. This can be achieved by redirecting the funds that the State (and the Region) invests in sectors that can be efficiently addressed by sport organisations. This is the case, for instance, of the health sector in which sport organisation can contribute with a cost-effective approach to enhance the level of well-being among the population.

e) Facilitate the turn-over

It cannot be denied that in labour sport market there are sector in which the turn-over is naturally high. This is factual in the fitness sector or in the mountain and skiing sector just to list a few. In this light the Government is require defining forms of protection and support that facilitate the change from one position to another especially when this switch is not immediate, and the employee is at risk.

f) Harmonisation of the regional laws in Sport

All the Regions in Italy have today a law in sport that, among the other things, influence the sport labour market. In many Regions, for instance, it is today compulsory for a fitness club to have a manager with a sport science degree; this is not happing for some other Regions. Several other discrepancies can be noted, beside this. Thus, there is the need to reach a harmonisation in order to avoid big difference across the Regions.

g) Face the challenges confronting for the sport organisations

The workforce of the sport organisation must be equipped to react to the challenges confronting the sport organisations (Digennaro et al. 2016). The first challenge for sports organisations is that funding bodies are increasingly seeking a convincing case for financial support and clearer evidence that investment has impacted on wider community objectives and successful elite performance. The second challenge is that sports organisations have to respond to changes in legislation and the risk of litigation as their operating environment shifts increasingly from amateur arrangements to professional management. The third challenge is that sports organisations increasingly operate in a competitive and commercial landscape that requires more businesslike practices and quicker decision making.

h) Tackling increased complexity by strengthening the governance of skills systems

This can be only achieved through a all-encompassing strategy that sees the collaboration of all the stakeholders – training providers, Universities, employers, etc. – that operate in partnership with the view to: Promote coordination, cooperation and collaboration across the whole of sector and between the sport sector and the other sectors (health, education, etc.); engage training providers and universities throughout the policy cycle with the aim to build integrated training and education systems; Aligning and coordinating financing arrangements.











ESSA-SPORT

Improving the Supply of Skills to the Sector

BIBLIOGRAPHY



BIBLIOGRAPHY

-  Borgogni A., Digennaro S., Mazzoli E (2017). ITALY: Dichotomies Between Professionalism vs. Voluntarism and Commercialisation vs. Non-profit in the Sport Sector, in : Laine, Antti & Vehmas, Hanna (Eds.), *The Private Sport Sector in Europe- A Cross-National Comparative Perspective*, Switzerland: Springer International Publishing, 193-209.
-  Digennaro S., Borgogni, A. e Sterchele, D. (2016). Un analisis de la participacion deportiva en Italia desde el advocacy coalition framework. Ramon-Llopis-Goig (ed.), *Participacion deportiva en Europa, Politicas, Culturas Y Practicas*, 359-383, Barcellona: Oberta UOC Publishing.
-  Digennaro S., Lowther, M. & Borgogni, A. (2016). The SATSport framework for effective governance in grassroots sports organisations. *Public policy and administration*, 14(2):515-528
-  Digennaro S., Colella D., Morano M., Vannini E. e Borgogni A. (2012). Nuovi profili professionali per gli operatori sportivi [New Professional Profiles for Sport Operators]. *Educazione Fisica e Sport nella Scuola*, 223: 18-22.
-  European Commission (2017). *The Recent Reform of the Labour Market in Italy: A Review*
-  Infocamere, 2017. Retrieved from <https://www.infocamere.it/documents/10193/90282173/Benessere%2C+il+business+della+bellezza+sfida+la+crisi/6ad70836-592b-4f98-9ba6-663706f36f30?version=1.0>; last access 20 June 2018.
-  ISTAT (2017). *La pratica sportiva in Italia*, «I cittadini e il tempo libero» [The Sport Participation in Italy, «Citizens and Leisure Time» October 2017 (see: <http://www.istat.it/it/archivio/204663>; and <http://dati.istat.it/>).
-  OECD (2019). *OECD Economic Surveys Italy*
-  World Health Organisation (2018). ITALY - PHYSICAL ACTIVITY FACTSHEET
-  <https://internationalliving.com/countries/italy/the-economy-in-italy/>
-  Italian Minister of Education
-  http://cejsh.icm.edu.pl/cejsh/element/bwmeta1.element.desklight-fb6a23d3-fc17-43c4-a2f1-b0b77f20e787/c/4._Luca_Eid__Nicola_Lovecchio__Marco_Bussetti_s._37-41.pdf



www.essa-sport.eu

This project has been funded with support from the European Commission.
This national report reflects the views only of the author, and the Commission cannot be held responsible for any use which may be made of the information contained therein.

With the support of the
Erasmus+ Programme
of the European Union

