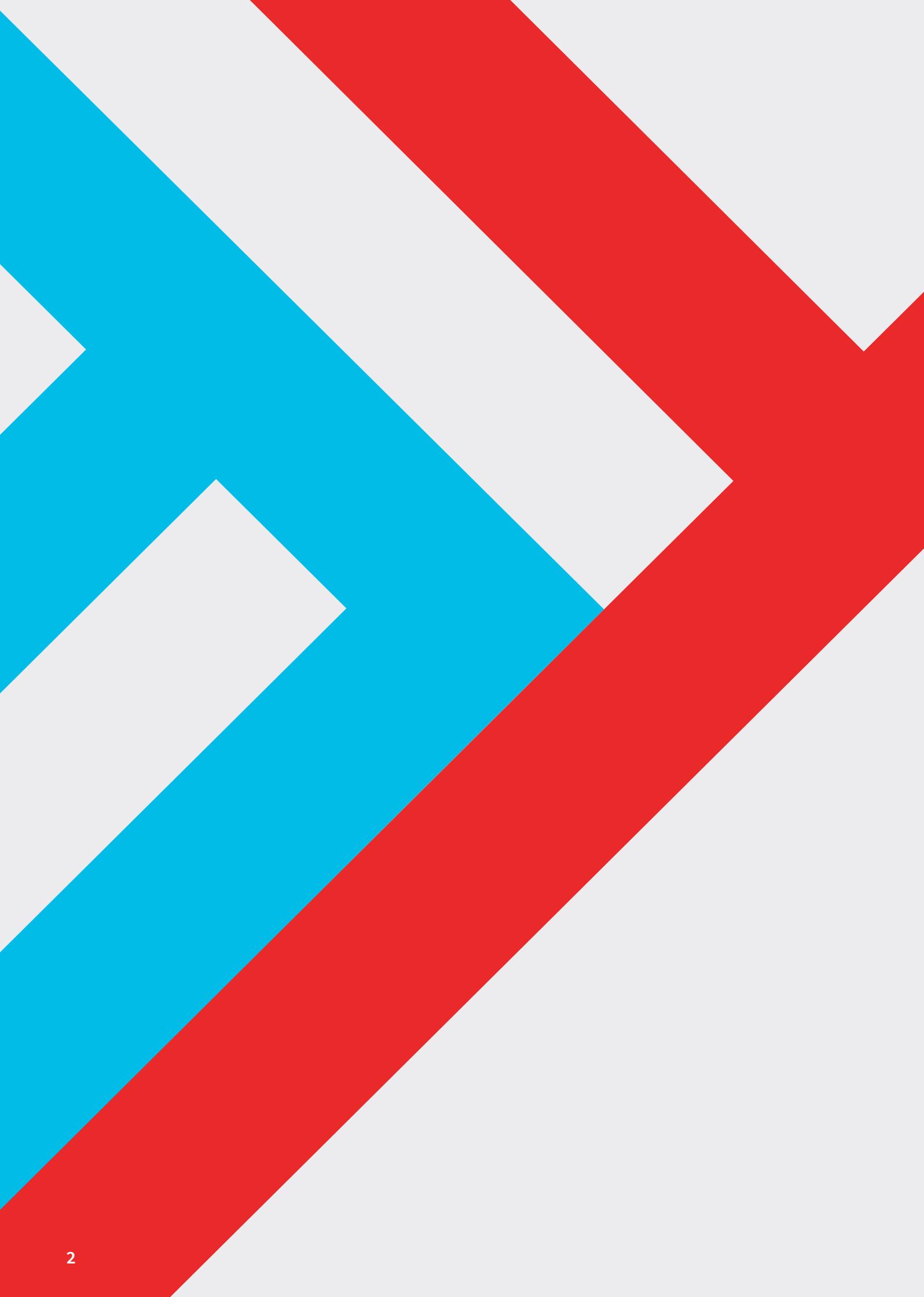


## **Cultural Skills Unit research summary**

Examining the cultural skills gaps and shortages  
in: Germany, Greece, Poland and Romania





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**‘...never has the European Union needed culture, in this root sense of the term, more than at the present time of deep crisis we face today. [Cultural activities] ... generate new ideas, innovation and social cohesion. That is why the European Commission believes that, even at these difficult times of budget constraints, Europe must not hesitate to invest in culture, a growth sector for new jobs, jobs with a future.’<sup>1</sup>**

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### **About this report**

This research was undertaken by the newly established Cultural Skills Unit at the British Council. It aims to contribute greater understanding of the skills gaps and shortages across the cultural sector in Germany, Greece, Poland and Romania.

Over the course of six weeks, 157 experts, including policy makers, British Council colleagues, and professionals working in education institutes, cultural institutions and independent organisations took part in semi-structured interviews.

To increase the validity of the study and to gain insight from a broader sample, an additional six focus groups were conducted and an online survey was completed by 291 cultural sector professionals across the four focus countries. Findings from this research will be used to inform the development of new programmes and products. It is important to note that the research was subject to limitations and uncertainties that are beyond our ability to control or estimate precisely.

Subsequently, the research was purposed with providing illustrative and informative insights into emerging skills gaps and shortages, but is not meant to be a fully comprehensive mapping of the cultural sector in each focus country. Neither the author nor the British Council assumes any responsibility for the accuracy, completeness or use of the findings.

### **Acknowledgements**

Sincere thanks are owed to all British Council staff who contributed their insight and expertise to this research. Without your tireless support and dedication, gaining access to such an extensive sample would have been impossible in such a short space of time. The British Council Cultural Skills Unit is also tremendously grateful to everyone who generously gave up their time to be consulted and to all those who kindly completed an online survey. Your contributions were invaluable in the writing of this report.

### **Author**

Magalie Rouschmeyer

## Foreword

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I warmly welcome the British Council's initiative to undertake this important research into cultural skills. The report is

extremely timely, as Europe continues to face high levels of unemployment. The cultural and creative sectors offer great potential to create jobs and growth in the four countries highlighted in the report (Germany, Greece, Poland, and Romania), as well as across the EU as a whole.

Our cultural and creative sectors account for up to 4.5 per cent of EU GDP and employ around eight million people. But, if the sectors are to expand, we need to address the skills gaps and shortages identified in the report – particularly the business and marketing skills which cultural professionals need in order to make the most of new technologies and financing models.

The European Commission has identified skills development as a top priority for cultural industries. In our strategy document *Promoting cultural and creative sectors for growth and jobs in the EU*, we call for stronger partnerships with employers, training providers and trade unions to deliver vocational training and continuing professional development. Our 2013 survey on access to finance found that a lack of business and

managerial skills in the cultural sector continues to dissuade banks from providing loans.

Business and managerial skills increasingly include creativity and the capacity to think outside the box. Cultural skills have much to offer in this context. Cultural awareness and expression are recognised as key competencies at EU level. I am convinced that creativity needs to be encouraged from an early age, preferably from kindergarten level. It has then to be continuously developed on a lifelong basis: employers and civil society should recognise this need and provide the necessary opportunities.

Informed by this report, and in partnership with organisations across the UK and in the European countries concerned, the British Council is well placed to help develop much-needed cultural skills. This is a great opportunity – which I hope will be seized – to open up new pathways into the cultural sector, increase learner mobility and create jobs and growth across the EU.



**Androulla Vassiliou**  
European Commissioner  
for Education, Culture,  
Multilingualism and Youth

## Foreword

Europe offers the perfect setting to undertake this research given its rich and diverse cultural tapestry, duly represented by each country examined in this report.

Given our long-term involvement in skills development globally and across the EU, it feels very timely for the British Council to be undertaking this exciting piece of research which will complement our existing skills agenda and also serve as new intelligence to further direct and drive the focus of our work.

Our aim is to realise a Europe where young people have the relevant skills they need to gain employment, meet business needs and build a vibrant, robust and sustainable cultural sector for the future. This report will act as a springboard from which we will initiate new opportunities to benefit generations of cultural practitioners across Europe and beyond.

The British Council's unique global position can offer the cultural sector access to UK sector-specific expertise, while simultaneously facilitating the promotion of multilateral cultural skills exchange via its extensive overseas network and audiences reach. To ensure longevity and the endurance of its programmes, the British Council cannot conduct activity alone; working in tandem with UK and regional partners adds value to the British Council's ability to succeed in its mission to build trust

and understanding between peoples of the world, and strengthen international cultural relations by engendering mutuality.



**Lowri Jones**  
Programme Manager,  
EU and Wider Europe,  
Cultural Skills Unit



**Silke Pillinger**  
Head of Arts,  
EU Region

Culture lies at the heart of the British Council's cultural relations mission to build links between people, institutions and countries around the world to engender mutuality, trust and understanding.

Culture is multifaceted; intrinsically creative, it celebrates both diversity and unity. It is also recognised for its instrumental value in contributing towards social cohesion and prosperity. This research provides us with vital information and evidence of what some of this cultural activity looks like. It allows us to fashion collaborative partnerships, strengthen our relationships in Europe and shape a positive course of action which will enable Europe's multifarious and unique culture and cultures to thrive.



**Simon T Dancey**  
Global Director, Cultural Skills Unit

## Introduction and contextual overview

Europe today faces a number of pressing challenges. Alongside the demographic change of an ageing population, Europe is experiencing a slow and fragile recovery from one of the worst global economic crises since the 1920s.<sup>2</sup> Eurostat estimates that in March 2014, there were 25.699 million people unemployed in the EU, equating to roughly 10.5 per cent of the active population.<sup>3</sup> The EU's youth unemployment rate for the same period stood at 22.8 per cent, with 34.2 per cent having been out of work for more than a year in 2013.<sup>4</sup>

Against this backdrop of high unemployment and slow economic growth, the cultural sector in Europe is increasingly being recognised as an engine that can fuel job creation, innovation, contribute towards social cohesion<sup>5</sup> and trigger spillover effects that benefit the wider economy.<sup>6</sup> Indeed, despite dramatic reductions in funding for culture across many countries, employment in Europe's cultural sector 'proved to be more resilient than in the EU economy as a whole'<sup>7</sup> in the three years leading up to 2011 (though growth rates varied between sub-sectors). To nourish the sector's growth and development, it is vital that the workforce is equipped with the necessary cultural skills to adapt to technological change and shifting labour market needs. At present, the research has identified that a number of skills gaps and shortages are holding the sector back from reaching its full potential.

Greater attention is being placed on continuing professional development and vocational education to address these training needs. Vocational education is considered an effective means of preventing skills mismatches between education and industry due to a strong attachment to the workplace.<sup>8</sup> In addition, traineeships, apprenticeships and internships can help ease young people's transition from school to work, as they offer an opportunity to gain insight into professional working life, gain practical experience and a chance to apply learning. Organisations must also make continued effort to provide their employees with training opportunities to ensure their skills remain updated and relevant.<sup>9</sup>

Working collaboratively with partners globally, the Cultural Skills Unit will develop new and exciting opportunities for individuals to enhance their skillset, equipping them with the necessary competencies to support the growth of the cultural sector. In addition, new initiatives will be developed aimed at improving the quality and quantity of pathways into the cultural sector for young people, helping generate new jobs and educational opportunities.



The UK is well placed to engage in this milieu as it has long benefited from a flourishing cultural sector. Recent government statistics reveal that the UK's creative industries are worth a tremendous £71.4 billion per year to the UK economy and accounted for 5.6 per cent of all UK jobs in 2012.<sup>10</sup> In addition, the UK is host to some of the world's most prestigious arts education institutes and cultural institutions. Drawing on

the UK's strength and expertise in this area, the Cultural Skills Unit aims to develop new programmes that will provide thousands of people worldwide with an opportunity to learn about, and experience, creativity and excellence from the UK. Through shared activity and mutuality, programmes will strengthen cultural relations and contribute towards mutual social, cultural and economic benefit.

## Germany

**While many countries are still feeling the effects of the recession, Germany is now the fourth-largest economy in the world<sup>11</sup> labelled an 'economic superstar' by scholars.<sup>12</sup>**

Having made a quick recovery from the economic crisis, the country demonstrated an impressive growth of three per cent in 2011.<sup>13</sup> Characterised by high levels of employment<sup>14</sup>, a strong demand for labour<sup>15</sup>, and diminishing levels of youth unemployment<sup>16</sup>, the German labour market has been heralded an 'anchor of stability'.<sup>17</sup>

Germany's strong vocational education system has been credited as one reason the country has been so successful at absorbing many of the shocks associated with the crisis.<sup>18</sup> A core component of vocational training within the dual system is the opportunity for young people to acquire practical insight into working life.<sup>19</sup> To minimise the occurrence of skills mismatches, the Federal Institute for Vocational Education and Training undertakes research and creates a platform for dialogue to help better adapt educational standards according to the needs of the labour market.<sup>20</sup> The success of these initiatives can be evidenced in the high employment rate of initial vocational education and training (IVET) graduates in Germany – figures which exceed EU averages.<sup>21</sup>

The cultural sector in Germany is vibrant and innovative, and plays a core role in the country's transformation towards a knowledge-based economy.<sup>22</sup> Cultural policy priorities include the protection and conservation of heritage (e.g. museums and monuments) and enabling large numbers of citizens to participate in cultural activities.<sup>23</sup> The cultural sector provides work for roughly one million people, generating over 60 billion euros value-added from products and services, representing approximately 2.6 per cent of GDP.<sup>24</sup> The sector is characterised by a high number of people working as self-employed or for micro-enterprises.<sup>25</sup> Some of the most important segments driving growth are software, gaming and design.<sup>26</sup>

Despite this positive outlook, a number of challenges prevail. Although there has been an increase in the number of educational programmes established for the cultural sector in recent years, demand for capacity building across the cultural sector remains high.<sup>27</sup> Many existing courses are observed to lack sufficient emphasis on important areas of business for



the cultural sector.<sup>28</sup> Subsequently, to gain a better understanding of individuals' education and training needs, research participants were asked to specify whether they observed any prevalent skills gaps.

Skills gaps commonly cited include management and leadership skills, closely followed by business and finance skills. In light of discussions around the privatisation of some institutions, greater emphasis is being placed on more effective arts management.<sup>29</sup> Reflecting this concern, interview respondents suggested that cultural sector professionals needed to develop greater competency in: developing a clear vision for cultural institutions, managing and building a successful

team, drawing on international best practice and identifying new sources of funding.

With regard to business and finance skills, participants reported a need for cultural enterprises to develop greater understanding of how to: earn money from their products and services, develop sustainable business strategies, and undertake better financial risk forecasting. Young people were observed to be most affected by a lack of relevant work experience and qualifications. Consequently, respondents cited a need to close the gap between theory and professional competencies required for work in a cultural institution.

## Greece

**Greece is a country flourishing with cultural identity and abundant with cultural heritage, including the world-famous citadel the Acropolis. As 'heirs to classical antiquity'<sup>30</sup>, the museum sector has been marked by tremendous growth with the aim of preserving and promoting the country's vast cultural heritage.<sup>31</sup>**

Both civil society and the cultural sector have benefited significantly from investments in infrastructure and services over the years, enabling more people to access culture.<sup>32</sup> Research respondents also emphasised a growth in the number of grassroots initiatives emerging across the cultural sector with a vibrant plethora of activity including project-based collaborations, networks of artists linking up and abandoned spaces used to exhibit work. Over the years a number of Greek cities have been selected as 'European Cultural Capitals'.

Between 2009 and 2010 the Greek economy was propelled into the start of what would become a protracted recession.<sup>33</sup> Austerity measures attached to international financial support<sup>34</sup> exacerbated the social cost of the crisis, leading to business closures, increased income inequality, and falling disposable household income.<sup>35</sup> The state budget allocation for culture has also been dramatically reduced since the start of the economic crisis, with reports estimating cuts of 74 per cent between 2009 and 2011.<sup>36</sup> With high levels of unemployment accompanying this period of deep economic crisis, Greece has begun

placing greater emphasis on upgrading the skills of the workforce.<sup>37</sup>

To gain a better understanding of individual education and training needs, research participants were asked to specify whether they observed any skills gaps across Greece's cultural sector. Findings indicate that professionals seek greater 'international exposure to best practice' in order to gain a stronger understanding of how cultural institutions are run overseas, what funding is available across the EU, and how to raise funds in a time of reduced state expenditure. Research participants also indicated that professionals needed to develop greater competency in building partnerships across the EU, to inspire new collaborations and to access valuable networks.

Skills gaps in 'business and finance' were also commonly cited, followed by a lack of 'marketing' and 'soft skills'. This is likely to reflect the need for cultural institutions to be more entrepreneurial in a time of austerity. In addition, it reflects a perceived growth in the number of independent initiatives. As the crisis forces organisations to merge and networks

of artists to link up, greater knowledge of business, finance and marketing becomes necessary to run a cultural institution or initiative as a successful enterprise.

The research also indicates a shortage of practical work opportunities and entry-into-the-sector initiatives for young people. Young people were also observed to lack international exposure to best practice, soft skills and technical/discipline-based knowledge.

In terms of skills shortages, research participants observed a shortage of technical personnel with the necessary skills to support the high quality production of performances, music and film. Many interviewees

attributed this skills shortage to an apparent lack of training facilities for technical professions across Greece. In addition, a shortage of cultural managers and curators was identified in the survey, though this finding did not emerge as strongly during qualitative interviews. Suggested explanations for these skills-shortages include: vacancies in state institutions which remain unfilled due to recruitment freezes; and an economic climate which requires new curators and arts managers to arrive equipped with competencies in marketing, business, finance, policy, digital etc. – something education institutes have not historically placed great emphasis on.

# Poland

**Poland is now the sixth most populous nation in the EU, characterised by a high percentage of young people<sup>38</sup> and tremendous economic growth in the past few decades.<sup>39</sup>**

Its economy has not been as severely affected by the financial crisis as other EU member states<sup>40</sup> and it was the only country in the EU demonstrating economic growth in 2009<sup>41</sup>, achieving a 12 per cent increase in GDP between 2008 and 2012.<sup>42</sup>

Poland's cultural sector is also perceived to be flourishing at a steady rate. The country boasts 13 cultural sites inscribed on the UNESCO world national heritage list. Kraków hosts over 100 festivals annually and is the first city in Central and Eastern Europe to have been awarded the title of European City of Culture.<sup>43</sup> The city of Warsaw has prioritised cultural sector development in its strategy Warsaw 2020, while the city of Łódź is home to the National Film School. Incubators are popping up in major cities, and a number of advocacy groups and associations have been established (for example, Performing Artists' Union, Filmmaker's Association), including the movement Citizens of Culture which campaigned for at least one per cent of the state budget to be allocated for culture.<sup>44</sup> The gaming sector is particularly strong in Poland, with numerous niche and large gaming studios established in many major cities.<sup>45</sup>

Despite this positive outlook, a number of challenges prevail.

Total employment across the cultural sector is perceived to be below average in comparison to the rest of Europe. There has also been a steady increase in the number of unemployed young people<sup>46</sup>, including the highly qualified. In a June 2014 review of the national reform programme, the European Commission acknowledged a disparity between skills supply and demand on the Polish labour market.<sup>47</sup> Indeed, the British Council's own research on skills gaps across the cultural sector also uncovered evidence of skills mismatches.

Cultural institutions in Poland are adapting to new market demands by employing staff with competencies in cultural management, promotion, advertising and finance.<sup>48</sup> To gain a better understanding of whether the labour market is equipped with these competencies, participants were asked whether the sector is affected by any skills gaps.

Findings indicate a shortage of business and finance skills, as professionals are observed to lack an understanding of relevant legislation (such as copyright); drafting business plans and funding proposals, conveying a creative idea using a business tone, new ways of generating income, financial management, how to approach funders, project planning



and reporting and drafting contracts (including licensing agreements).

Skills gaps in management, leadership and marketing were also cited. Here, respondents emphasised a need to better understand how to position yourself in the market, communicate your message effectively and draw in new audiences. The need for greater investment in community engagement and audience development was also suggested by many. According to research participants, young people are mostly affected by a lack of

international exposure to best practice, closely followed by a need to develop stronger business, finance and soft skills.

In terms of skills shortages, research participants observed a lack of arts managers, producers, art critics and lighting designers. Interviewees specified that arts managers lacked a strong vision for the sector, an international network and an understanding of new financing avenues.

## Romania

**Rich in valuable cultural heritage, the cultural sector is an area of growing importance for Romania, and has been labelled ‘one of the most dynamic sectors of the national economy’.<sup>49</sup>**

UNESCO estimates that the share of cultural employment in total employment stands roughly at 1.54 per cent<sup>50</sup>, while the creative industries were deemed to contribute 5.95 per cent to the national economy in 2009.<sup>51</sup>

From 2008–13, a national strategy sought to increase the quality of heritage sites through investment in preservation, training and management.<sup>52</sup> Film is another sector of noteworthy importance. With reports of growth in the quality and quantity of films produced, and a number of productions winning awards at prestigious international film festivals.<sup>53</sup> Interview respondents also suggested that the gaming sector is starting to gain traction with a number of international video game developers opening up production studios and small enterprises being established. The independent arts and cultural sector has also been flourishing in recent years.<sup>54</sup> In some regions, cultural NGOs are now perceived to be the most active players in the sector, implementing programmes that encourage greater citizen participation in cultural activities.<sup>55</sup>

Despite indications of positive growth, Romania’s cultural sector is confronting a number of challenges

stifling its rapid development. Numerous changes in political leadership have impacted on the effective management of cultural activities and policy. The onset of the economic crisis has meant diminished funding for culture<sup>56</sup>, leading to job losses, salary cuts<sup>57</sup> and the dismantling of a public cultural television channel.<sup>58</sup>

In June 2014, the European Commission advised policy makers in Romania to strengthen access to vocational education and training (VET), lifelong learning and apprenticeships, while better adapting the curriculum to meet labour market needs.<sup>59</sup> Echoing this recommendation, research respondents cited a shortage of formal work placements in the cultural sector where young people could acquire an accredited recognition-of-learning (e.g. diploma). Interviewees also suggested that the education system lacks sufficient technical and administrative training programmes for the cultural sector in areas of: curating, lighting design, sound engineering, stage management, arts management, business and finance.

To gain a better understanding of individual education and training needs, research participants were



asked to specify whether they observed any skills gaps across Romania's cultural sector. Findings indicate that professionals lack international exposure to best practice which would provide greater insight on how standards can be improved and how the sector can flourish under more effective management. A lack of soft skills was also commonly cited, followed by a need to develop cultural management and leadership skills. A need to grow competencies in audience development was also suggested in light of the fact that public spending on cultural goods is dwindling, with visitor numbers down at theatres, museums, concerts and exhibitions, as the public chooses less costly leisure activities.<sup>60</sup>

According to research participants, young people are mostly affected by a lack of international exposure to best practice, followed by a lack of relevant work experience and qualifications. In terms of skills shortages, research participants observed a lack of arts managers and a shortage of technical personnel across a number of disciplines, including sound engineers, editors, video game producers, directors, stage managers, 3D animators and set designers. The lack of VET and continuing professional development (CPD) training programmes in these fields was frequently used by interviewees to explain these skills shortages.

## Conclusion

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**The economic crisis has severely reduced levels of state funding for culture in a number of countries triggering job losses, pay cuts and recruitment freezes. In spite of these challenges, the cultural sector has proven to be one of the most dynamic segments of the economy.**

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With a growing number of independent initiatives, professionals are exploring new ways of generating income, managing activities and collaborating across borders and disciplines. This plethora of activity acts as a catalyst for economic growth via innovation, job creation and increasing the competitiveness and attractiveness of each nation in Europe.

While these are encouraging developments, the research undertaken for this report demonstrates that greater investment is needed to address a number of inhibiting cultural skills gaps and shortages. The following conclusions are drawn from a cross-cutting analysis of research findings and illustrate core areas of need that require greater consideration:

### **1. New pathways into work**

A core theme of the crisis in the EU has been high levels of youth unemployment. According to research participants, there remains a shortage of structured and accredited entry-level opportunities for young people across the cultural sector. More investment is needed to ease the school-to-work transition by helping young people build a network of valuable contacts, apply knowledge gained during their studies and achieve a competitive advantage on the labour market via the acquisition of new skills and professional experience.



## 2. Arts management

Arts management was frequently cited as a skills shortage by research participants. During this period of fragile economic growth, the budgets of many cultural institutions have been severely cut. As a consequence, arts managers are increasingly being relied upon to identify new funding avenues, develop a vision for their sector, outreach to new audiences, grow their network, have legal and business competencies, and apply learning from international best practice. Interview respondents frequently recommended a need to support arts managers with high-quality professional development opportunities in these areas.

## 3. Technical skills

Rapid technological development is changing the way that many cultural activities and products are created, performed and shared with audiences. Research participants advised that many individuals working across the cultural sector seek new opportunities to update their technical competencies.



The following fields of work were most frequently cited by interview respondents in this regard: technical roles for theatre and film (lighting, sound, stage management, make-up, directing, editing, scriptwriting); technical skills for the textile and garment industry; digitisation of cultural heritage and professional development for restorers, curators and heritage managers.

## 4. Short modular courses for professionals

With a growing number of independent initiatives across the cultural sector, coinciding with a need for cultural institutions to be more entrepreneurial in their approach; research participants identified skills gaps in the areas of: business, finance, marketing and audience development which need to be addressed.



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## **About the Cultural Skills Unit**

The Cultural Skills Unit will strengthen cultural relations through shared activity and mutuality by consolidating and developing the British Council's global cultural skills offer.

Together with our partners, we will realise the British Council's cultural relations objectives by building sustainable cultural skills programmes that will ensure the cultural industries are equipped with highly skilled workers, who can contribute to mutual economic and cultural benefit.

Our activities will benefit the institutions and individuals of the whole UK by providing opportunities to engage and prosper from this work by showcasing creative excellence from the UK.

Contact us at:  
[culturalskills@britishcouncil.org](mailto:culturalskills@britishcouncil.org)

## **About the British Council**

The British Council is the UK's international organisation for cultural relations and educational opportunities. We create international opportunities for the people of the UK and other countries and build trust between them worldwide.

Our 7,000 staff in more than 100 countries work with thousands of professionals and policy makers and millions of young people every year through English, arts, education and society programmes.

We are a UK charity governed by Royal Charter. All our work is in pursuit of our charitable purpose and creates prosperity and security for the UK and the countries we work in all around the world.

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