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**IME GSEVEE**

Small Enterprises Institute  
of GSEVEE



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**GSEVEE**

Hellenic Confederation  
of Professionals Craftsmen  
and Merchants



**live skills**

Image Sound & Performance

**Live Skills project: a research on trends and skills needs of the  
creative and cultural sector**

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Co-funded by the  
Erasmus+ Programme  
of the European Union

# Background

- In the European Union, **approximately 1.5 million** cultural and creative businesses have a turnover of around **650 billion euro** and employ more than **8 million workers**.
- **CCIs have positive effects** on GDP and employment, improve competitiveness and help local economies to attract more investments, new businesses and skilled labour.
- There is a growing consensus as to the important role of cultural and creative industries in **promoting smart, sustainable and inclusive growth** in European regions and cities.
- CCIs have proved to be **resilient to the crisis** with innovative solutions contributing to growth and jobs.
- However, recent research and policy reports highlight the **skills shortages** of the workforce in the cultural and creative sectors. These shortages are mostly on **transversal entrepreneurial and digital skills**.

# Hellenic Confederation of Professionals, Craftsmen & Merchants (GSEVEE)



Est. 1919

## GSEVEE

Hellenic Confederation  
of Professionals Craftsmen  
and Merchants

- Represents small and medium enterprises of the manufacturing and the services sector in Greece.
- Incorporates 90 federations, (59 local, 30 sectoral and 1 of pensioners)
- 1100 unions with 140.000 entrepreneurs registered



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## IME GSEVEE

Small Enterprises Institute  
of GSEVEE

Institute of GSEVEE

- carries out studies and surveys,
- Implements national and EU funded Projects



Est. 1995

## KEK GSEVEE

Vocational Training Centre  
of GSEVEE

Centre for Continuing Vocational Training of  
GSEVEE

- Certified educational, nationwide, centre
- 6 branches over Greece

# Rationale

The project will address the following specific needs and challenges:

1. AV & LP should become more entrepreneurial
2. Skills Diversification & Lifelong learning needs are not fully addressed
3. Digital shift and technological developments are changing the ways AV & LP works
4. VET education does not match industry needs

# AIM

The aim of Live Skills is to tackle skills gaps in the CCS and more specifically in AV and LP sectors by addressing market needs for:

- digital new technologies,
- arts management,
- entrepreneurship skills

and thus to enhance the relevance of the initial and continuous VET systems in four EU countries to sector-specific labour market demands.

This will be achieved through the design and piloting of three innovative curricula for two professions in the AV & LP sectors (but also adaptable to a broader range of roles in the sector), focusing on both transversal and profession-specific skills, with multiple modules

# Erasmus +

- The European Union's **Erasmus+** programme is a funding

## Key Action 1: Learning Mobility of Individuals

- Erasmus Mundus Joint Masters Degrees
- Large Scale European Voluntary Service Events

## Key Action 2: Cooperation for innovation and the exchange of good practices

- Capacity building in the field of youth
- Capacity Building in the field of higher education
- Knowledge alliances
- **Sector Skills alliances**

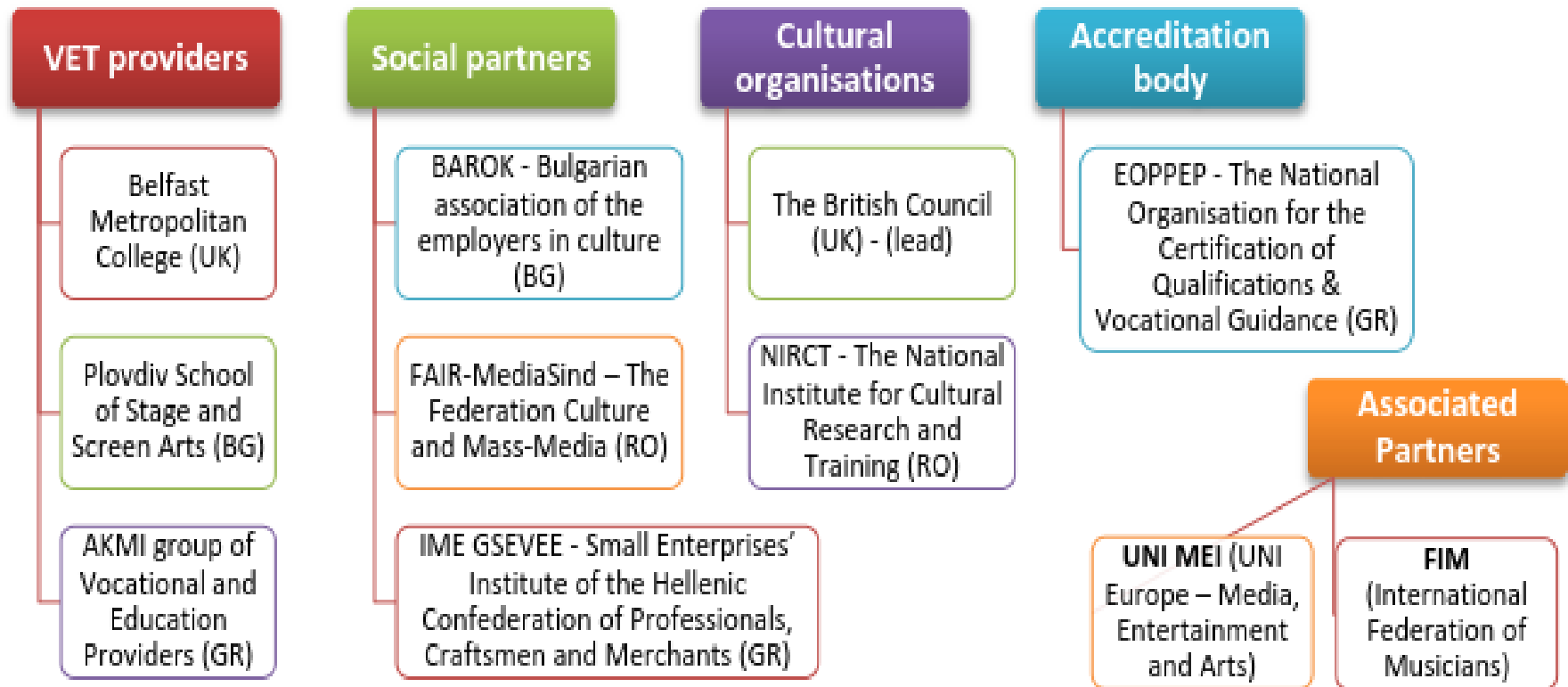
**Sector Skills Alliances aim at tackling skills gaps with regard to one or more occupational profiles in a specific sector.**

## Key Action 3: Support to policy reform

- Civil Society Cooperation: Youth
- Civil Society Cooperation: Education and Training
- Erasmus Charter for Higher Education
- National Authorities for Apprenticeships
- Initiatives for policy innovation
- European Policy Experimentations
- Forward-Looking Cooperation Project
- Social inclusion through education, training and youth
- Structured Dialogue Youth
- Comprehensive policy frameworks for continuing VET
- Support for small and medium sized enterprises engaging in apprenticeships
- KA3 – VET-Business Partnerships on Work-based learning and Apprenticeships
- Higher Education Reform Experts (HEREs)

# Consortium

Live Skills is a three year project, co-funded by the Erasmus+ programme and led by the British Council in collaboration with eight full partners across four countries (Bulgaria, Greece, Romania and the UK) and two European-wide associated partners:



	Tasks	Deliverables - WP2
<b>Live Skills Work Packages</b>	<b>2.1 Building a common methodological framework for State of the Art and scoping analysis</b>	<b>Harmonized framework for the scoping analysis</b> principles, aims and objectives <ul style="list-style-type: none"> <li>• analysis of the agreed methodology</li> <li>• research target groups</li> <li>• templates of questionnaires,</li> <li>• framework of interviews conduct,</li> <li>• number and criteria for case study selection and scoping</li> <li>• study expected outcomes</li> </ul>
<b>WP1 Project management</b>	<b>2.2 Initial skills mapping and identifying common trends</b>	
<b>WP2 Scoping Analysis &amp; State of the Art Review</b>		
<b>WP3 Core curricula design / Implementation</b>		<b>F2F interviews and focus groups with the National Stakeholder Committee x 4 countries</b> a set of minimum 3 in depth, semi-structured qualitative interviews <ul style="list-style-type: none"> <li>• 2 focus group discussions on the identification and interpretation of skills needs and competences in the targeted sectors will take place in each country between M5 and M6</li> </ul>
<b>WP4 Curricula Delivery / Implementation</b>	<b>2.3 Conducting countries specific validation of findings</b>	<b>On line workforce survey</b> <ul style="list-style-type: none"> <li>• online survey targeting specifically current and aspiring workforce of the sector will be conducted in each country</li> <li>• a minimum of 100 professionals working or aspiring to work (graduates including) in the AV&amp; LP sectors will be targeted.</li> </ul>
<b>WP5 Quality Assurance</b>		<b>Skills Chart</b> <ul style="list-style-type: none"> <li>• Skills Chart that will focus on interpreting identified and documenting trends and skills needs and formulating recommendations for improved professional training schemes in alignment to national and Europe an qualification frameworks in the participating countries.</li> </ul>
<b>WP6 Evaluation</b>	<b>2.4 Conducting pan European consultation</b>	<b>E- learning kit</b> <ul style="list-style-type: none"> <li>• a learning toolkit for policy makers, governmental agencies, businesses and employers in the AV &amp; LP sectors and education providers.</li> </ul>
<b>WP7 Dissemination and Communication</b>	<b>2.5 Analyzing the findings and making recommendations</b>	<b>Final report and recommendations</b> n electronic report including 4 country specific reports which will compile and analyse the findings that will have derived from the country specific interviews, focus groups and on line survey
<b>WP8 Exploitation and Sustainability</b>		



# Research method: Triangulation



# Basic figures on CCI

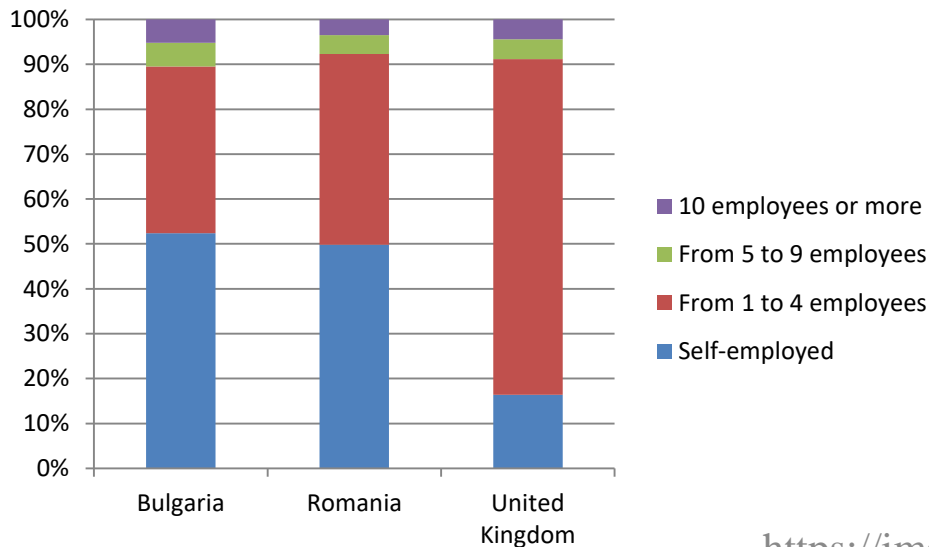
The crisis had a negative impact on employment in the sector for BG and Greece but not for RO and UK.

	Number of persons employed in the “Creative, arts and entertainment activities” sector, (in thousands)		
	2008	2015	2008/15 change
<b>Bulgaria</b>	14,9	12,2	-18,1%
<b>Greece</b>	12,6	9,6	-23,8%
<b>Romania</b>	14,9	16,9	13,4%
<b>United Kingdom</b>	163,2	205,7	26,0%
<b>Total</b>	206	244	18,9%

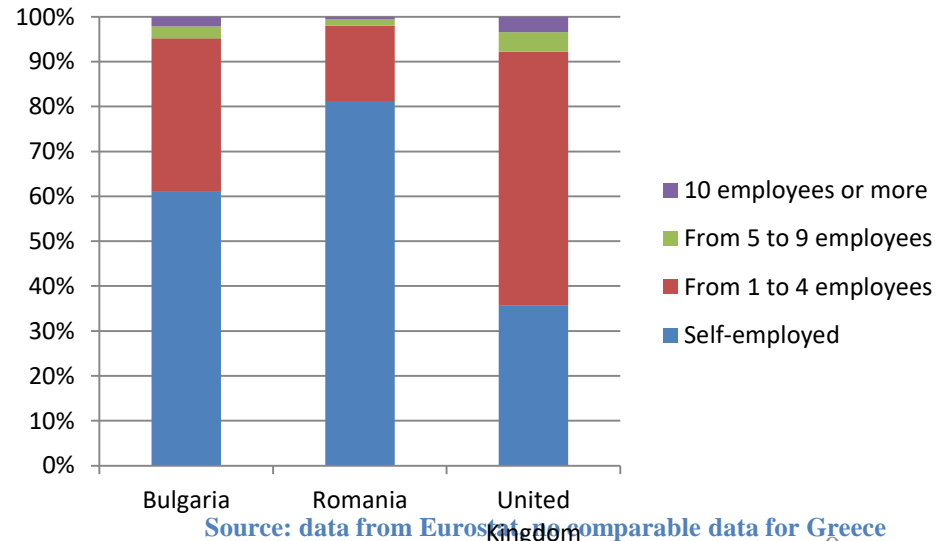
The majority of the enterprises in the sector comprises of micro and small enterprises, while more than half of the firms in Bulgaria and Romania are self-employed persons with no employees

Source: data from Eurostat,

Number of employees per firm for the AV sub sector



Number of employees per firm for the LP sub sector



Source: data from Eurostat, comparable data for Greece

# Major trends

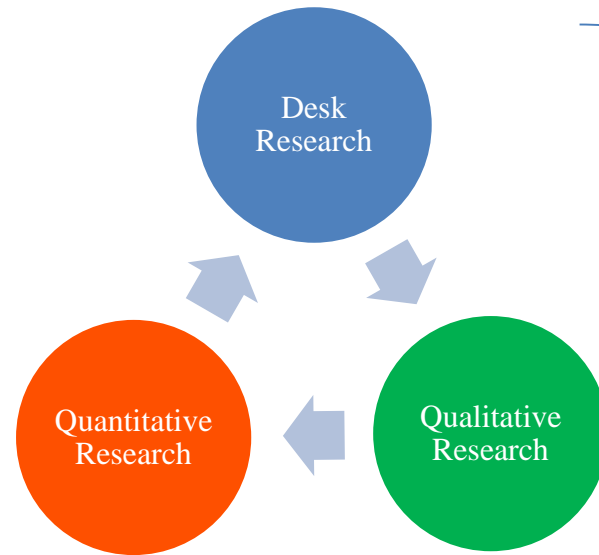
As a reaction to the crisis, there is an increase in the

- birth of new small enterprises and especially self-employed,
- alternative sources of funding such as crowdfunding,
- collaborative communities and spaces (in the form of creative hubs, incubators, labs, etc) also emerged

# Building a common methodological framework for State of the Art and scoping analysis

Aim: Develop a manual for the implementation the research

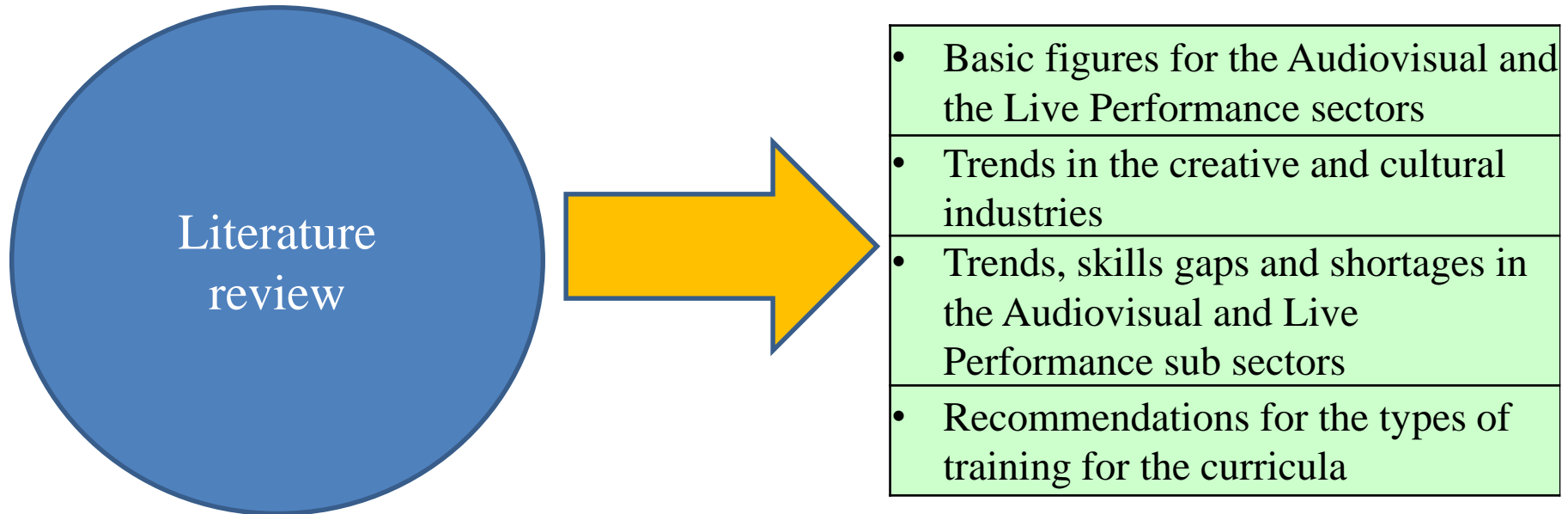
Manual for the partners



- Summary of WP2
- Research method
- Analysis of WP2 tasks
- Required Human Recourses
- Assignments per partner
- Instructions for the Interviews
- Instructions for the Focus Group
- Attendance sheet
- Interview Form
- Focus Groups' Form

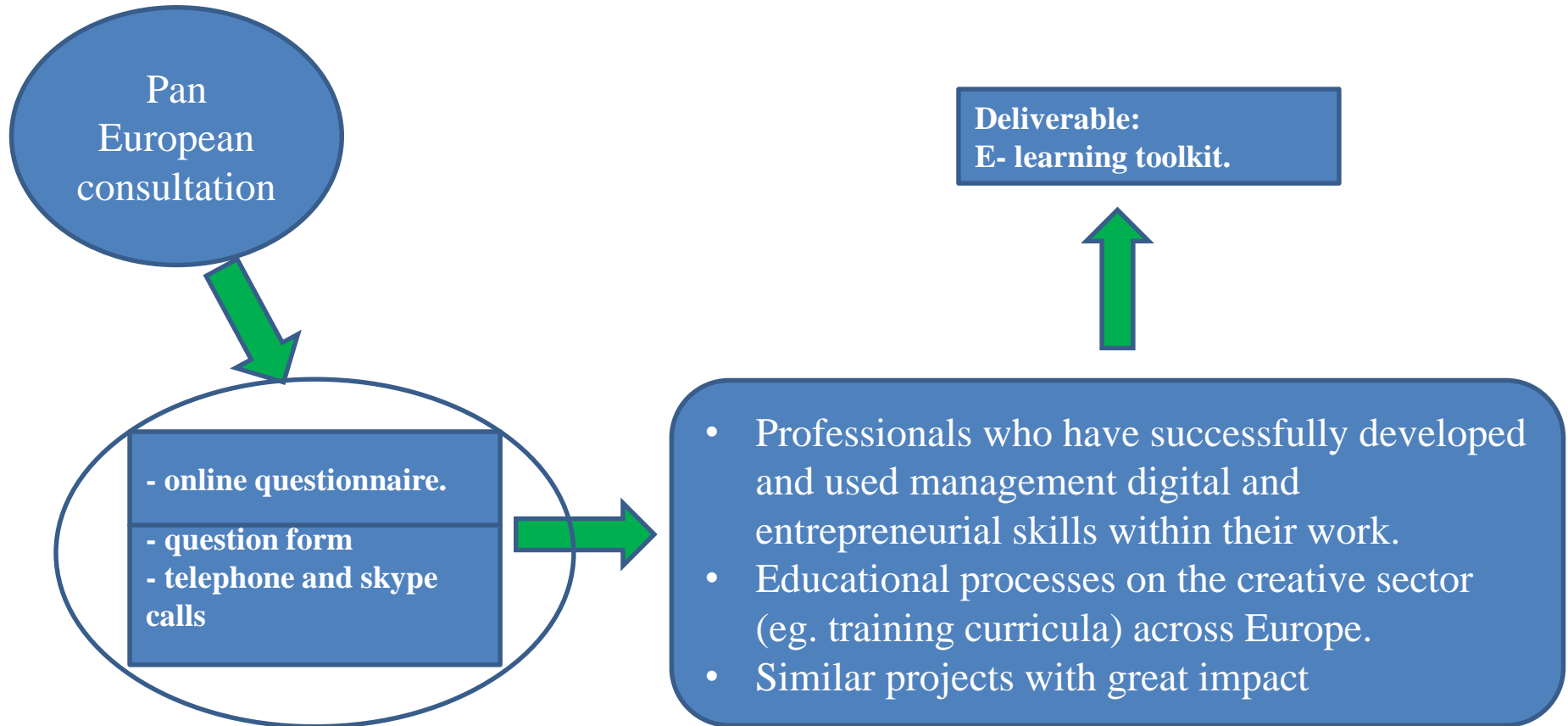
# Desk Research

Aim1: Review the basic literature around the new trends and skills needs of the AV and LP sub sectors



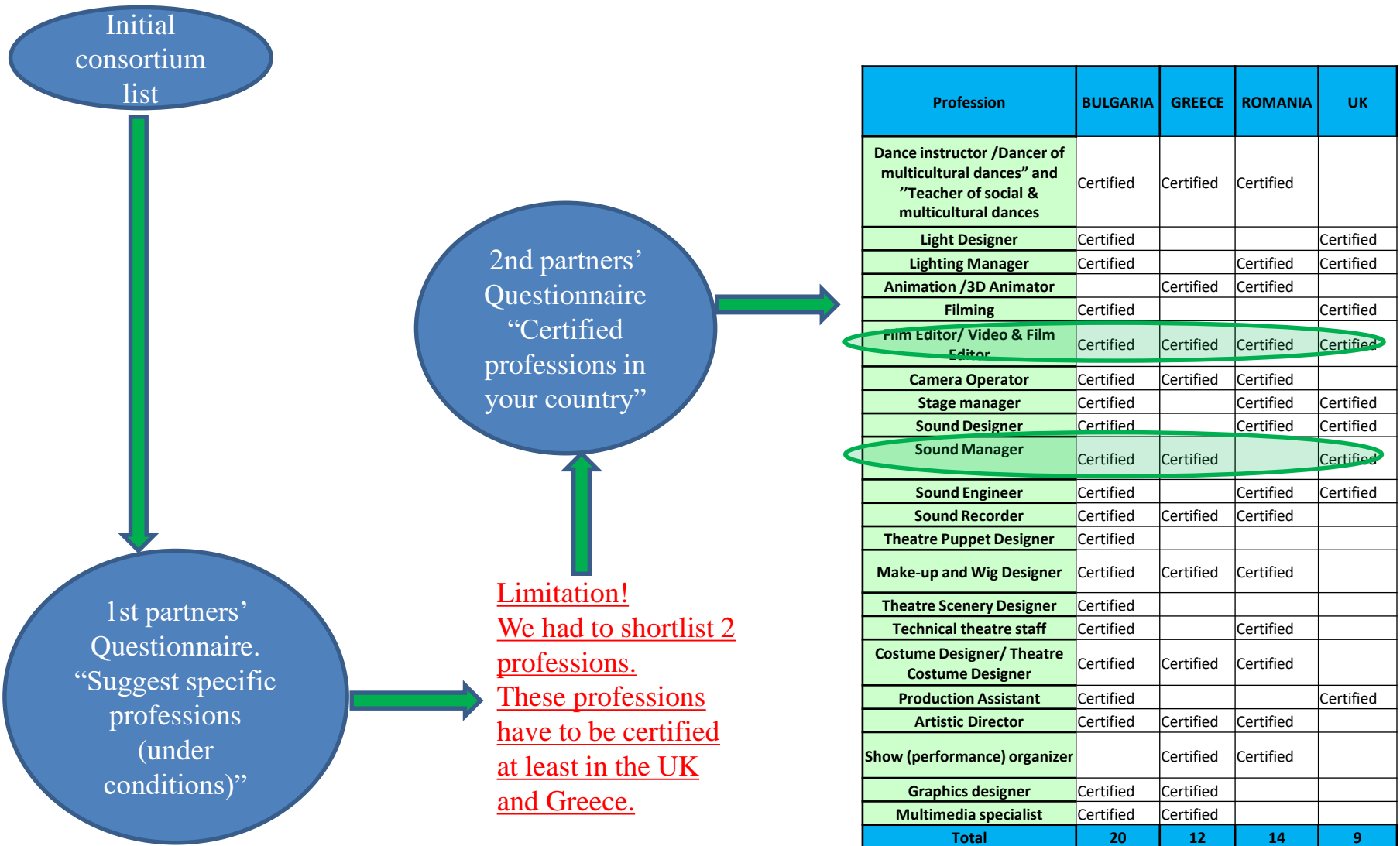
# pan-European consultation

Aim: Identification of best practices.



# Desk Research

Aim2 : Select specific professions for developing the curricula



# Qualitative research

Aim: Make a skills' need and country trends analysis

Set up National Stakeholders Committees in the 4 countries.

- organizations covering horizontally the sector or/ and Audio Visual and Live Performances sub-sectors (sector skills councils, ministries of culture etc).
- organisations and practitioners covering vertically the professions or professions' categories (unions, experienced practitioners etc.)

Implementation of focus groups and interviews in every country

4 Country reports.

- Trends in the country.
- Skills needs in the AV and LP sub sectors



# Quantitative research

Aim: Validate and weight our findings

Online Survey  
13.7.2017-31.12.2017

Disseminated by the partners and their networks to:

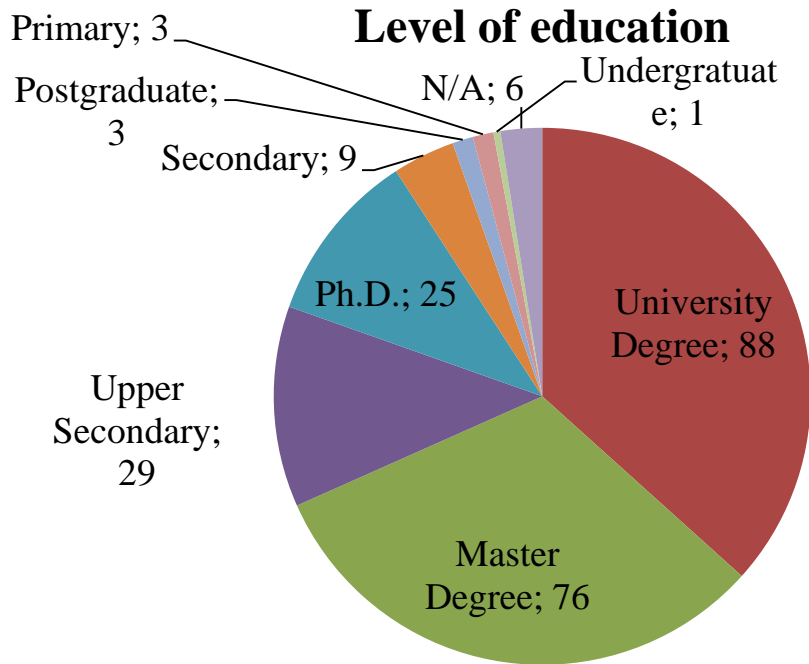
- practitioners of the sound management and film editing
- broader professional categories or related professions

- Collection of data (240 respondents)
- Comparison and validation with our previous findings

- Skills chart
- Final Report and recommendations



# Education



There is high concentration of respondents on the higher educational levels.

It is caused by respective high concentration of MScs and Ph.Ds in Bulgaria and Romania which is not reflected in the sample in Greece or the UK.

Most of the respondents had prior education relevant to their creative profession. Especially in Greece the rate was significantly higher compared to the other three countries.

Education relevant to their creative profession										
	Bulgaria		Greece		Romania		UK		Total	
<b>No</b>	18	33%	11	15%	18	24%	10	26%	57	24%
<b>Yes</b>	36	65%	62	85%	55	75%	28	74%	181	75%
<b>N/A</b>	1	2%		0%	1	1%		0%	2	1%
<b>Total</b>	55	100%	73	100%	74	100%	38	100%	240	100%

# Training

The most common method of prior training delivery are workshops, seminars or both.

E-learning as a sole method of delivery compiles a very low proportion in all the four countries.

In Bulgaria seminars are by far the most prevalent method unlike workshops.

Prior training for their creative profession in the form of:					
	BG	GR	RO	UK	Total
workshop	9%	23%	26%	18%	20%
seminar	24%	23%	12%	8%	18%
workshop+seminar	20%	16%	20%	5%	17%
workshop+seminar+e-learning	9%	14%	15%	24%	15%
N/A	9%	14%	8%	18%	12%
e-learning	7%	3%	7%	3%	5%
other	11%	4%	3%	0%	5%
e-learning+other	2%	0%	0%	13%	3%
workshop+e-learning	2%	0%	3%	5%	2%
seminar+ e-learning	4%	3%	0%	0%	2%
workshop+seminar+other	2%	0%	4%	0%	2%
workshop+seminar+e-learning+other	2%	0%	1%	0%	1%
seminar+ other	0%	0%	0%	3%	0%
workshop+e-learning+other	0%	0%	0%	3%	0%
workshop+other	0%	0%	1%	0%	0%
total	100%	100%	100%	100%	100%

# Income

The relative majority of respondents in Bulgaria, Greece and Romania get below 5.000€.



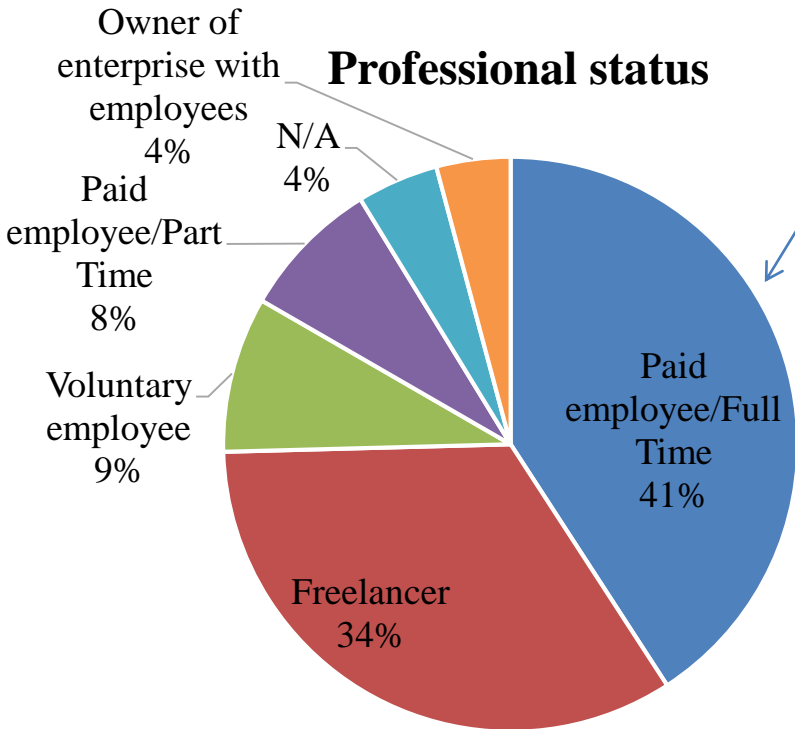
Gross annual earnings (BG, RO, GR)			
	BG	GR	RO
0€-5.000€	42%	48%	45%
5.001€-10.000€	25%	25%	1%
10.001€-15.000€	9%	15%	14%
15.001€-20.000€	7%	1%	3%
20.001€-25.000€	4%	1%	1%
50.001€-100.000€	2%	1%	26%
100.001€-above	2%	5%	5%
N/A	9%	3%	5%
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

Gross annual earnings UK)	
£0-£5,000	5%
£5,001-£10,000	13%
£10,001-£15,000	18%
£15,001-£20,000	21%
£20,001-£25,000	11%
£25,001€-£30,000	8%
£30,001€-£50,000	18%
£50,001€-£100,000€	3%
N/A	3%
<b>Total</b>	<b>100%</b>



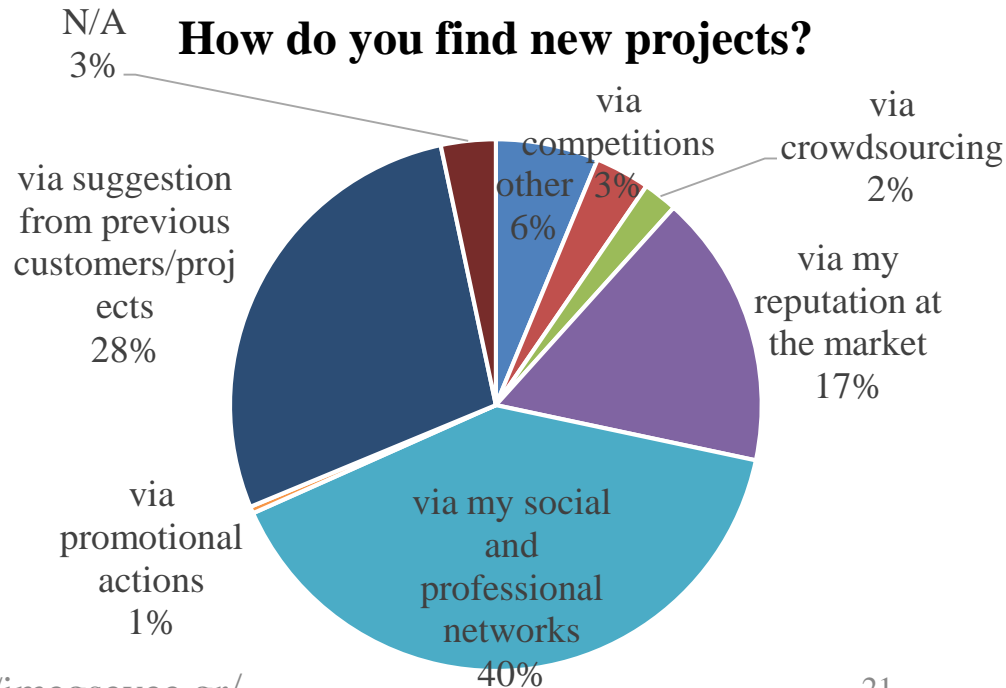
In the UK the allocation of earnings is more even. One fifth of the respondents declared that their earnings are £15,001-£20,000

# Professional status



- The relative majority are working as full time or part time paid employees or are working voluntarily. There are also a high proportion of freelancers and only a few enterprise owners.
- Their motivation for becoming freelancers is freedom of choice and the difficulty in finding a paid employee job on the sector is also a very popular response.

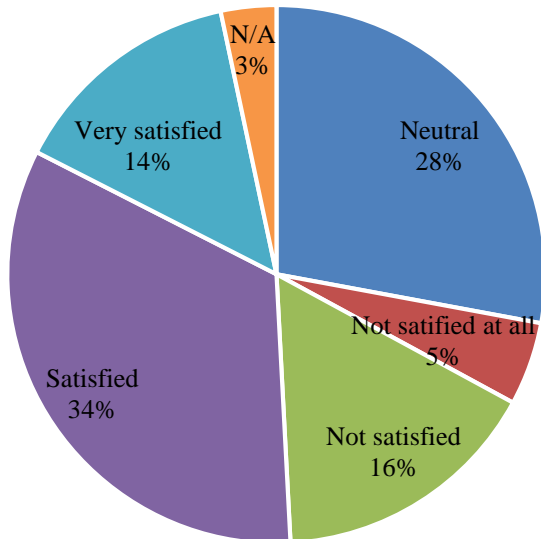
Most of the respondents find new jobs and projects through traditional channels such as their social and professional networks and through suggestions from previous customers.



# Level of satisfaction on respondents skills

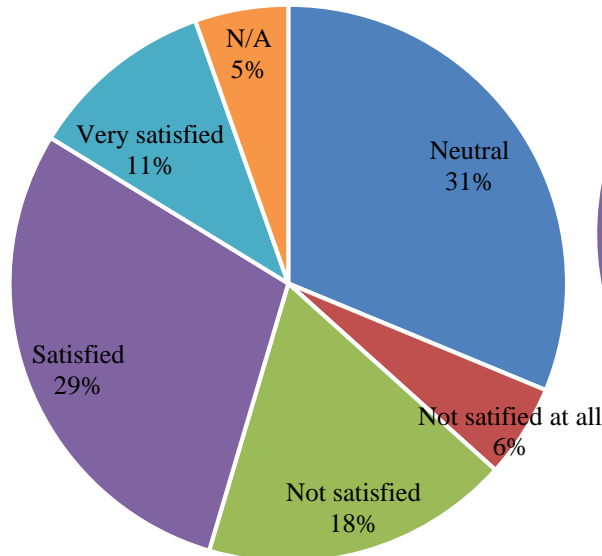
Their satisfaction with their level of skills in Arts management, is not very high since only half of them expressed satisfaction

**Arts management**



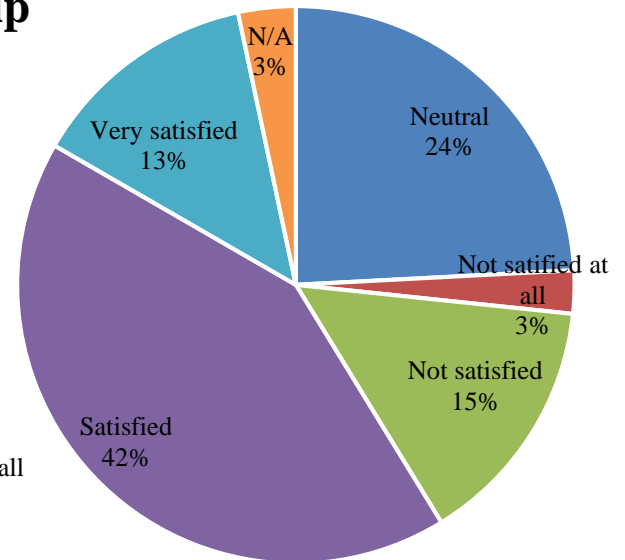
The situation is even worse with the level of skills in Cultural entrepreneurship, since less than half of the respondents stated satisfied

**Cultural entrepreneurship**



The situation is much better regarding the respondents' satisfaction with their level of skills in Digital and New Technologies

**Digital and new technologies**



# Skills to improve

The most «voted» skills

<b>Arts Management</b>	<b>Digital and new Technologies</b>	<b>Cultural Entrepreneurship</b>
Arts financial management	Understanding new technologies	Creativity and idea generation
Project management	Marketing and audience development	Working with others
Fund raising and grant writing	Digital art and design skills	Entrepreneurial vision
Presentation and communication skills	Social media	Spotting opportunities
International and inter-cultural arts management	Digital marketing	Crisis management

These skills «fed» the curricula that were developed in the next phases of the project.



# Conclusions

- The sector is rapidly being digitalized with the appearance of new technologies and is characterized by a diversity of sources of funding and business models.
- The workforce is predominantly young and has high levels of qualifications but the majority is underpaid and cannot be economically independent.
- Freelancers and business owners in the sector is usually imposed by the difficulty to find an employee position with satisfactory field work and compensation.
- Technicians are educated mostly theoretically. Skills are learned on the job rather than during training but there is a lack of formal work based learning programmes.
- Transformations in the sector impose the development of t-shaped skills of into three broad categories. Arts Management Skills, Digital and New Technologies Skills and Cultural Entrepreneurship Skills and our research has pointed specific skills into the above categories that are important.
- In some countries, private foundations and other stakeholders try to fill the gap of skills development but this is not enough in order to fill the gap of skills in the sector.
- There is less funding available for skills development for freelancers than employees.
- Regarding modes of delivery of the curricula, it seems that traditional face to face class lessons are still the most preferable mode of delivery.

# Recommendations

- Policy makers and decision makers should encourage the development of the relevant policy frameworks at Member State level
- There is also a clear need for increasing funding and developing further sustainable support structures and mechanisms
- More attention needs to be given to change both employers' and employees' perceptions on continuous professional development
- Give more attention to the role of Civil Society and social partners, as well as contribution to public consultations mechanisms
- Develop national strategies for the AV and LP industries to provide the strategic foundation for ongoing development of policies and plans
- An industry-education/training forum should be established to bring together the demand and supply sides of skills development in the AV and LP sectors.
- Acknowledging the digital shift, European and national policy makers should address the **digital gap between generations of young learners and more experienced professionals**, by prioritizing the up-skilling of experienced professionals and in parallel, by equipping young learners with digital & new technologies skills.

# Recommendations

- Current and future policies at the European and national levels in the AV and LP should give incentives to employers for committing to training programmes of young professionals.
- A detailed census should be undertaken across the industry in every country, similar to the work undertaken by Creative Skillset for the creative industries in the UK.
- Create an online pan European professional learning network for freelancers, paid employees and employers, where these groups will exchange information about new jobs, new technologies, and network each other.
- Collaborative schemes such as clusters should be boosted through the establishment of creative hubs and co working spaces in the CCI. For a collaborative scheme to be developed, apart from creating the needed facilities it is also equally important to have empowered facilitators who will coordinate the collaborative schemes and also provide support services to its members.

# Thank you!

<https://www.live-skills.eu/>

<https://imegsevee.gr/>

<http://www.gsevee.gr/>



Έτος Ίδρυσης 2006

**ΙΜΕ ΓΣΕΒΕΕ**

Ινστιτούτο Μικρών Επιχειρήσεων  
ΓΣΕΒΕΕ



Έτος Ίδρυσης 1919

**ΓΣΕΒΕΕ**

Γενική Συνομοσπονδία  
Επαγγελματιών Βιοτεχνών  
Εμπόρων Ελλάδας