

Cultural Skills Unit research summary

Examining the cultural skills gaps and shortages
in: Singapore, Hong Kong, Indonesia and Burma



‘Skills have become the global currency of the 21st century. Without proper investment in skills, people languish on the margins of society, technological progress does not translate into economic growth, and countries can no longer compete in an increasingly knowledge-based global society.’¹

About this report

In 2013, the British Council’s Cultural Skills Unit conducted a piece of research to acquire greater understanding of the skills gaps and shortages affecting the cultural sector in Singapore, Hong Kong, Indonesia and Burma. This summary paper provides an overview of key findings from this piece of work.

Over the course of nine weeks, 164 experts took part in semi-structured interviews including policy makers, British Council colleagues, and professionals working in education institutes, cultural institutions and independent organisations.

To increase the validity of the study and to gain insights from a broader sample, an additional six focus groups were conducted and an online survey was completed by 101 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.

Acknowledgements

The Cultural Skills Unit is grateful to all external partners, professionals and colleagues who generously gave up their time to contribute their insights and expertise to this research, including over 100 individuals who kindly completed an online survey. Your contributions were invaluable in the writing of this report.

Foreword

Courtesy of Lord Puttnam



As the Prime Minister's Trade Envoy for a number of countries in South East Asia, I've spent a fair amount of time

travelling to the region and observing the medium term growth prospects of many countries – particularly from the perspective of how trade, investment and exchange of knowledge can generate mutual socioeconomic benefit.

Many of these countries are rapidly growing their cultural industries – and I'm prepared to bet they'll be increasingly successful.

That's because the people living in that region are, individually and collectively, placing all of their bets on education, training and skills – most particularly so in these cultural industries. Greater insight into skills gaps and shortages enables a far more tailored approach to the growth of a country's cultural sector, and can help boost its potential comparative advantage.

This is brilliantly illustrated in this report.

We have no choice but to understand the implications for our own cultural industries, and their position in an increasingly globalised labour market; with all the uncertainties and possibilities that are likely to flow from it. This report and those that follow, lay the foundations in developing our understanding of the nature of those implications, and how we ourselves can begin to work more collaboratively.

A handwritten signature in black ink, appearing to be 'D. Puttnam'.

Lord Puttnam of Queensgate, CBE

Lord Puttnam of Queensgate, CBE, spent 30 years as an independent producer of award-winning films. His films have won ten Oscars, 25 Baftas and the Palme D'Or at Cannes. He was founding Chair of NESTA, chaired the National Film and Television School for ten years and is the chair of Atticus Education, an online education company.



Multiple face statue, Hindu temple, Singapore

Introduction and contextual overview

Over the last 20 years, the cultural industries have increasingly been recognised as a global economic success story.² In the ten years leading up to 2010, they saw an annual growth rate 'four times that of manufacturing in many OECD and developing countries'.³ The cultural sector is also increasingly being recognised as an area of activity which can help shape national identity, enhance community engagement, create new jobs, improve quality of life and provide an avenue for self-expression.

However, although the cultural sector is playing a core role in the development of numerous cities across the Asia Pacific region,⁴ many developing economies are yet to truly benefit from the full potential of their cultural industries.⁵ A key priority for these governments will be to effectively harness the abundance of creative activity taking place to support their development goals⁶ and to drive growth. In a highly competitive 21st century global market, a crucial component to supporting the growth of various industries within the cultural sector will be to ensure the workforce is equipped with the necessary skills and competencies.

Investment in skills can help reduce unemployment, poverty and enable greater social mobility.⁷ In fact, evidence suggests that adults with lower levels of skills are less active in community organisations, report poorer health and are more likely to be economically disadvantaged.⁸ 'Skills also influence civic and social behaviours in ways that can have significant impacts on democratic processes and business relationships'.⁹

By developing new and exciting opportunities for individuals to enhance their skillset, the Cultural Skills Unit aims to ensure professionals are equipped with the necessary competencies to support the growth of the cultural sector and to meet business needs. Working collaboratively with partners globally, 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, recently described as an economic 'powerhouse' by the UK government.¹⁰ 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 2012.¹¹ 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.



Simon T Dancey
Global Director, Cultural Skills Unit

Key findings

While there are evident contrasts in the socio-political and economic landscape of the focus countries included in this research, a number of commonalities can also be drawn. For example, an encouraging observation is that investment in human capital for the cultural sector is slowly becoming an important priority for many governments, or at the very least, an active interest has been demonstrated within this milieu.

This can be evidenced in the growing number of specialist arts education institutes and in various other initiatives such as (but not limited to) grants provided by the National Arts Council in Singapore to support the professional development of individuals and organisations. For example, grants can be used for apprenticeships, masterclasses, diploma courses and mentorship programmes.

The Government of the Hong Kong Special Administrative Region approved funding of HK\$150million

in 2013, to strengthen and enhance the availability of training and capacity building initiatives for its cultural sector workforce over the next five years.¹²

In Indonesia, an initiative supported by the country's Ministry of Tourism and Creative Economy has been to develop a Creative Campus which aims to equip individuals with new skills and practical work experience.¹³ And lastly, the Ministry of Culture in Burma has undertaken an early assessment of training needs for its museum and heritage-sector workforce and is working closely with international partners to develop the framework for a National Skills Development Authority.

While these are encouraging developments, the research identified a number of critical skills gaps and shortages prevalent within each of the focus countries. A summarised selection of these findings is now presented in this report.



Traditional Burmese dancers

Indonesia

Indonesia benefits from an abundance of creative talent. However, interview respondents reiterated that a lack of skills and competencies in certain areas is holding the sector back from fully flourishing.

In particular, this includes a need for greater investment in business and leadership skills. Approximately 90 per cent of Indonesian businesses are SMEs¹⁵ yet research findings suggest that while many people have the creative talent, they lack the necessary skills to write a realistic business plan, manage cash flow, draft a fundraising proposal and market their products. A successful business requires a competent workforce with the skills that will translate a creative idea into a marketable product.¹⁶ Hence interview respondents suggested the need to support this creative talent by equipping professionals with the necessary business, marketing, finance and legal competencies.

Research participants also articulated a need for initiatives that enable cultural sector professionals

and entrepreneurs to grow their network and develop partnerships to gain greater access to global and domestic markets.

Despite being one of the most active economies on Twitter, it is reported that only 75,000 of 17 million registered Indonesian SMEs have an online presence via a website.¹⁷ Interview respondents cited that greater investment is needed to strengthen the quality of web design and to generate greater understanding of the value added from mobile apps and websites.

Survey and interview data suggests that skills shortages are prevalent across the cultural sector, including a lack of qualified and specialist technical theatre professionals, a lack of arts managers and art critics.

Burma

After years of military rule, Burma held elections in 2010.¹⁸ Social and economic reforms have begun taking pace¹⁹ as the country transitions towards democracy. A number of positive developments are being introduced such as the Comprehensive Education Sector Review (CESR), the development of a National Skills Development Authority and independent initiatives by organisations eager to develop their own training schemes to support individuals wishing to pursue a career in the cultural sector.

One of Burma's greatest assets is its rich cultural heritage.²⁰ Fashioned over many years, there are numerous breath-taking natural heritage sites, a distinctive culture of handicrafts (e.g. lacquer ware in Bagan) and a passion for theatre.

However, the cultural sector suffered significantly under the military regime. It has been deprived of investment and activities have been constrained by years of censorship, international isolation and the imprisonment of practitioners making political art. The research identified widespread skills-gaps and shortages. Absent and rundown cultural infrastructure, limited job prospects, an expertise-deficiency, a lack of international exposure, and minimal training and education provision are just some of the challenges affecting the sector.

Consequently substantial investment is needed to nurture human capital particularly around discipline-based knowledge and technical skills. The government has articulated an interest in developing the skills of its museum and heritage sector workers, including developing individual's competencies in cultural heritage management for conservation and tourism purposes, as outlined in the Myanmar: Tourism Master Plan 2013–2020.²¹ Numerous research respondents cited an interest in developing the necessary knowledge and competencies to archive cultural material and historical data, while developing initiatives to make this material accessible to the wider population. Other key skills-gaps include: business and marketing skills, leadership skills and English language skills.

Singapore

Skills gaps: survey respondents cited soft skills as the most prevalent skills gap across Singapore's cultural sector. This skills gap which includes creative thinking, critical analysis, collaboration and communication was also highlighted by interview respondents who suggested a need for greater investment in this area.

Complementing this finding was an identified need for more investment in creative education. Singapore increasingly recognises that twenty-first century skills are vital components to an innovation-driven knowledge economy, hence many interview respondents advocated for greater focus on creative education in schools and increasing the variety of opportunities to develop these skills outside the classroom. Many cultural sector professionals are looking towards creative education and soft skills as vital components to increasing the cultural sector's necessary competitive edge.

Survey and interview data also identified a need for greater investment in discipline-based knowledge, particularly around community arts. A 2012 Cultural Statistics study revealed that 62 per cent of Singaporeans believe that arts 'enriches their quality of life'.¹⁴

As the social value derived from participation in arts and cultural activities becomes increasingly recognised, more opportunities are needed to develop the skillset of community arts managers, venue

managers and cultural sector professionals in areas such as increasing public participation in cultural activities, developing and delivering community outreach and engagement programmes, and providing support for community-initiated arts events. Numerous research participants suggested that these initiatives would help contribute towards shaping Singapore's cultural landscape and championing its cultural heritage and identity.

Skills shortages: data from the survey reveals that Singapore suffers from a supply-side shortage of skilled and qualified professionals within its cultural sector. This finding was further validated during interviews where skills shortages identified include: curators and conservators, creative writers (playwrights and novel writers), technical sector workers (producers, stage and production managers), community arts managers and arts educators.

Hong Kong

Skills gaps: survey respondents ranked the skills gaps in Hong Kong according to the most critical gap first and the least critical last. Discipline-based knowledge and technical skills were identified as the most prevalent skills gap followed jointly by soft skills and business and leadership skills.

Data from the qualitative interviews validated these findings and provided a deeper understanding of the results. High-level leadership skills were commonly cited as a core skills gap, with greater investment needed in succession-planning to develop the skillset of middle managers in areas such as cultural policy, international networking, creative enterprising and digital strategy. Greater focus is also needed on providing tailored training to cultural sector professionals in areas of business, management and marketing, including negotiation skills, budgeting, policy dialogue and writing funding proposals.

Similarly, audience development emerged as a core skills development need. Herein professionals articulated a need for greater exposure and understanding of best practice with regard to engaging the community, fostering arts appreciation, using creative pedagogy to devise public education campaigns and promoting performances more widely.

Skills shortages: interview and survey data identified a supply-side shortage of personnel in certain professions. This includes curators, technical sector workers (venue managers, lighting designers, sound

designers, stage managers) and arts managers at senior/executive level. With significant investment in cultural infrastructure, some of these skills shortages are an anticipation of future demand rather than a reflection of current gaps in the workforce.

Interview respondents shared a number of key insights into current and future challenges which may impact upon Hong Kong's cultural sector. This includes a brain drain of qualified and experienced personnel attracted to opportunities overseas, particularly in mainland China where employment opportunities in the cultural sector are growing rapidly; a talent retention problem as many professionals seek promotion and professional development in other sectors. With limited opportunities for professional development, many people have felt constrained in their ability to reach their potential. Lastly, numerous respondents voiced a need to further develop cultural policy, to explore current governance structures within Hong Kong's cultural sector and to create more avenues for policy dialogue.

Conclusion

Investment in the cultural sector is emerging as an important priority for many governments. However, there remains a critical need for greater support and investment in human capital. The following conclusions are drawn from a cross-cutting analysis of findings from each of the four focus countries.

Specialist and generalist continuing professional development: there was an evident shortage of business and marketing skills across the cultural sector. These 'generalist' skills gaps included marketing, fundraising, PR, communication skills, project management, audience-development, basic understanding of cultural sector policy, legal basics, proposal writing and business planning. 'Specialist' skills gaps were also present. Leaders and future leaders across the cultural sector need more opportunity to grow their global network, gain a deeper understanding of cultural policy, be exposed to international best practice and new ways of working, contribute to collaborative projects and enhance their understanding of how digital

technology can transform branding and artistic production, provide access to new markets and create a more dynamic interplay between consumer/producer.

Creative education: low levels of creative education are a cause for concern, as the education system is increasingly 'expected to develop new ways of thinking, involving creativity, critical thinking, problem-solving and decision-making ... including the capacity to recognise and exploit the potential of new technologies; and, the capacity to live in a complex world as active and responsible citizens'.²² These comprise core skills for the 21st century and are vital to supporting the growth of the cultural sector.



Vocational education and training (VET): there is a general concern that existing education and training provision is insufficient to address the needs of the cultural sector. Creating opportunities for dialogue, collaboration and strategic partnership between education institutes, industry and training and qualification bodies is crucial for driving up the quality and diversity of VET provision and to ensure education programmes meet the needs of the labour market.

Practical learning opportunities: interview respondents emphasised a keen interest in acquiring new skills via 'hands-on learning' opportunities. Suggestions included: mentoring schemes, incubation programmes, entrepreneurial business acceleration programmes and internships. Mentoring schemes enable more established professionals to share learning with emerging leaders, advise them when faced with new challenges, guide them to help grow their network and support them in their professional development.

In addition, support to entrepreneurs can help them transform a creative idea into a marketable product. While entry into the sector can be a very real challenge, internships – developed and managed in the right way – can help young people gain a foothold in their chosen sector and develop the necessary skills to meet labour market needs.

Opportunities for regional learning: more opportunity for regional learning was identified as a key development need. This is crucial as the OECD highlights that policies on skills development should shift towards adopting a more global perspective, with opportunities for cross-border knowledge transfer and partnership development.²³ Within the four focus countries there are evident opportunities for this to take place by drawing on the skills and expertise of each nation and developing opportunities to share learning with others.



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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 that 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.

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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.

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