

Skills4Retail
Building sustainable growth

European Retail Skills Strategy

Deliverable 2.2

09/08/2024

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About the Skills4Retail project

The Skills4Retail project focuses on fast-tracking the 'Triple Transition' of Green, Digital and Resilience in the Retail sector, helping retailers to embrace ecommerce and ensuring their new business models are sustainable from the start.

The project's goal is to design a new Retail Skills Strategy and VET Training Programme that will address the urgent and emerging skills needs of retailers in the key areas of Digital, Green and Resilience. It will focus on training fresh new talent for the sector through training programmes in VET Schools and Higher Education Institutions, and the reskilling of the existing workforce via work-based learning and short-term modular courses.

What is WP2 and how does it fit into S4R?

The following graph shows the work packages of the project and how WP2 fit into S4R.

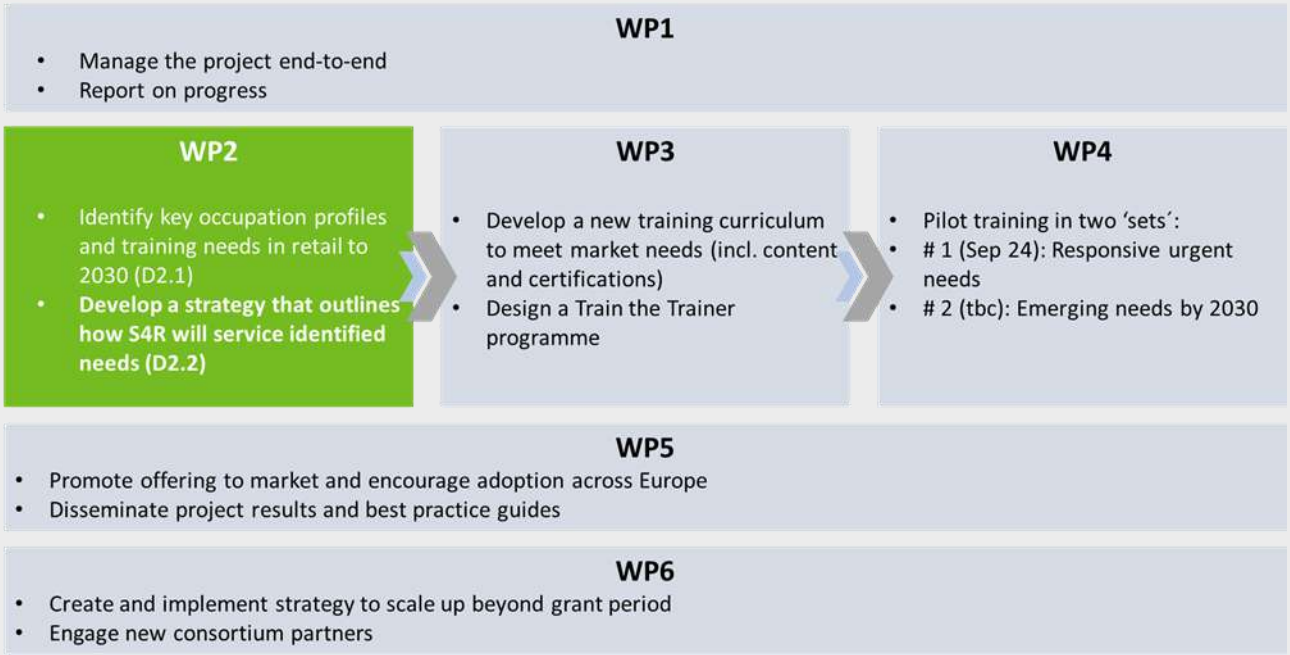


Figure 1 "Relationship between S4R Work Packages" (Source: Accenture)

Work Package 2 (WP2) lays the groundwork for the entire Skills4Retail project. As a first step, the project will develop an **initial version of the European Retail Skills Strategy** (deliverable 2.2) by leveraging the findings from the project's occupation profiles and training needs analysis (deliverable

2.1). These findings will serve as the basis for defining strategic recommendations that will shape the new retail skills strategy. The strategy will encompass a comprehensive rollout plan, outlining activities, milestones, and measurable outputs. The primary objective of this strategy is to effectively address the skills gaps in the retail sector.

In addition to the initial development of the skills strategy, the project will implement a **regular improvement / updating process**. This process will involve conducting periodic reviews of the skill needs and profiles in the retail sector. It will also include gathering feedback from training providers and key stakeholders in the labour market. This improvement process will commence after the completion of the **pilot testing phase** (WP4), still within the project's designated period. This timeline allows for the collection of sufficient data and insights during the pilot phase, which will inform the **review and enhancement of the strategy** during the project. By incorporating feedback from training providers and key stakeholders in the labour market, the aim is to continuously enhance the effectiveness and relevance of the European Retail Skills Strategy over time.

The strategy forms the **basis for outcomes and deliverables to be developed with WP3** in the upcoming phase of the project. It will build on the mapping of skills to personas of this strategy, and it will focus on **designing a vocational education and training (VET) curriculum** that includes skills, competences and personas identified in the analysis phase and in the skills strategy. Moreover, this involves the development of a VET training programme that encompasses learning materials, delivery methods, a “train-to-trainer” approach and further training principles as recommended in the strategy. The target will be to build sustainable career pathways and foster continuous upskilling and reskilling aimed to equip individuals with the skills and competences necessary to adapt to the green and digital transition within the retail sector. This will enhance the resilience of retailers and enable them to navigate the changing landscape effectively.

Pilot VET training will be implemented within WP4 at various levels to address both urgent / reactive and long-term skills requirements. While the reactive training programme will be implemented starting from September 2024 to address the immediate skills needs of the retail sector, focusing on the existing retail workforce, the VET (Vocational Education and Training) curriculum for emerging trainings, developed based on comprehensive research conducted in Work Package 2 (WP2), will be piloted starting in autumn 2025. This phased approach ensures that the immediate gaps in skills

are quickly filled, while also preparing for long-term, sustainable training solutions that are informed by thorough analysis and research.

The **communication strategy** in WP5 considers the rollout processes of the project's activities, ensuring a widespread dissemination of project results and good practices, as well as facilitating and promoting collaboration amongst Alliance partners. It will make operational the S4R website for downloading all courses developed in SCORM format.

The **long-term sustainability strategy** in WP6 will scale up the activities post project, which includes creating a long-term action plan for the roll-out of activities after the project is finished, ensuring sustainability of industry-education cooperation and exploiting EU funding opportunities to support implementation.

The Skills4Retail consortium

The Skills4Retail consortium is an Erasmus + partnership for innovation funded project, bringing together the following partners.

1	Partner	Acronym	Country
2	Junior Achievement-Young Enterprise Latvija	JA-YE Latvia	Latvia
3	Profesionalas Izglitibas Kompetences Centram Rigas Valsts Tehnikums	RSTS	Latvia
4	Matrix Internet Applications Limited	Matrix Internet	Ireland
5	Karlínská obchodní akademie	Karlínská	Czechia
6	Schuman Associates SCRL	Schuman	Belgium
7	Junior Achievement Austria - Unternehmerische Praxis- und Kompetenzbildung	JA Austria	Austria
8	Scoala Superioara Comerciala Nicolae Kretzulescu	SSCNK	Romania
9	Wirtschaftskammer Österreich	WKO	Austria
10	Universitatea din Bucuresti	UB	Romania
11	Digital Technology Skills Limited	DTSL	Ireland
12	Escola Profissional de Vila do Conde	EPVC, Vila do Conde	Portugal
13	Junior Achievement Magyarország Oktatási, Vállalkozásszervezési Alapítvány	JA Hungary	Hungary
14	Aprender a Empreender - Associação de Jovens Empreendedores de Portugal	JA Portugal	Portugal
15	Asociatia Junior Achievement of Romania	JA Romania	Romania
16	Skillnet Ireland Company Limited by Guarantee	Skillnet	Ireland
17	Vállalkozók és Munkáltatók Országos Szövetsége	VOSZ	Hungary
18	Szent Gyorgy Hang - Es Filmmuveszeti Technikum	SZGYF	Hungary
19	Junior Achievement, OPS	JA Czech	Czechia
20	Junior Achievement Young Enterprise Malta Foundation	JA Malta	Malta
21	Junior Achievement Young Enterprise Ireland	JA Ireland	Ireland

22	OTB Europe	OTB Europe	Portugal
23	Accenture SA	Accenture SA	Belgium

No	Associated Partner	Acronym	Country
1	Intel Technology Poland Spółka z ograniczoną odpowiedzialnością	INTEL Poland	Poland
2	JMH, SGPS, S.A.	JerónimoMartins	Portugal
3	EuroCommerce	EuroCommerce	Belgium
4	SPAR Österreichische Warenhandels AG	SPAR	Austria
5	Svaz obchodu a cestovního ruchu České republiky	SOCR CR	Czechia
6	Szegedi Tudományegyetem	USZ	Hungary
7	UNI Europa*	UNI Europa	Belgium

* Joined as an Associated Partner on Oct. 30th, 2023

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Definitions and abbreviations

Term	Description
AI	Artificial Intelligence
CVET	Continuing vocational education and training. CVET supports lifelong learning, integration and inclusion, employability and employment, mobility and better allocation of labour, innovation, productivity, competitiveness and growth.
D2.1	Deliverable 2.1 - Occupational Profiles and Needs Analysis
D2.2	Deliverable 2.2 - European Retail Skills Strategy
DigComp	Digital Competence Framework for Citizens. A framework developed in Europe providing a common understanding of what digital competence means.
EdTech	Educational technology (commonly abbreviated as edutech, or edtech) is the combined use of computer hardware, software, and educational theory and practice to facilitate learning. When referred to with its abbreviation, "EdTech", it often refers to the industry of companies that create educational technology.
ESCO	ESCO is the multilingual classification of European Skills, Competences, Qualifications and Occupations. ESCO is part of the Europe 2020 strategy. The ESCO classification identifies and categorises skills, competences, qualifications and occupations relevant for the EU labour market and education and training. It systematically shows the relationships between the different concepts.
EU	European Union
EUROPASS	EUROPASS is a set of online tools and information that helps you manage every step of your learning and career. The tools and information support you in communicating your skills, qualifications and experiences clearly and consistently across Europe.
EQF	The EQF is an European 8-level, learning outcomes-based framework for all types of qualifications that serves as a translation tool between different national qualifications frameworks. This framework helps improve transparency, comparability and portability of people's qualifications and makes it possible to compare qualifications from different countries and institutions.

	The EQF covers all types and all levels of qualifications and the use of learning outcomes makes it clear what a person knows, understands and is able to do. The level increases according to the level of proficiency, level 1 is the lowest and 8 the highest level. It is closely linked to national qualifications frameworks (NQF).
EQVAT	European Quality Assurance in Vocational Education and Training - EQAVET. The EQAVET is a community of practice bringing together the Member States, social Partners and the European Commission to promote European collaboration in developing and improving quality assurance in VET by using the European Quality Assurance Reference Framework.
GenAI	Generative artificial intelligence (generative AI, GenAI, or GAI) is artificial intelligence capable of generating text, images, videos, or other data using generative models, often in response to prompts. Generative AI models learn the patterns and structure of their input training data and then generate new data that has similar characteristics.
HR	Human Resources
ILO	International Labour Organisation. An international organization that is part of the United Nations and whose aim is to protect the rights and improve the working conditions of employees all over the world.
ISCED	International Standard Classification of Education. ISCED is the reference international classification for organising education programmes and related qualifications by levels and fields.
ISCO	The International Standard Classification of Occupations (ISCO) is a four-level classification of occupation groups managed by the International Labour Organisation (ILO). Its structure follows a grouping by education level. The two latest versions of ISCO are ISCO-88 (dating from 1988) and ISCO-08 (dating from 2008)
L&D	Learning & Development
LinkedIn	The name of a social networking website/platform for business people to communicate, find new job opportunities, share information.
NQF	National Qualifications Framework NQFs in EU are linked with EQF. It classifies qualifications by level, based on learning outcomes - that is, what the holder of a certificate or diploma is expected to know, understand, and be able to do. This classification reflects the

	content and profile of qualifications. It allows learners to move more easily between education and training institutions and sectors.
SFIA	The Skills Framework for the Information Age (SFIA) Foundation produces the global, industry-recognised skills and competency framework for the digital age.
SCORM	Sharable Content Object Reference Model (SCORM) is a collection of standards and specifications for web-based electronic educational technology (also called e-learning). It defines communications between client side content and a host system (called "the run-time environment"), which is commonly supported by a learning management system. SCORM also defines how content may be packaged into a transferable ZIP file called "Package Interchange Format.
SME	Small and medium sized enterprises. Smaller businesses in the economy.
S4R	Skills4Retail
VET	Vocational education and training
VR	Virtual Reality
WEF	World Economic Forum skills taxonomy
WIFI	“Wirtschaftsförderinstitut Österreich” Institute for economic development of Austria
WKO	“Wirtschaftskammer Österreich” Federal chamber of commerce of Austria
WP	Work package of the project

Executive summary

The European Retail Skills Strategy is developed by the Skills4Retail partnership, consisting of 23 project partners, who has been formed under the EU programme ERASMUS+. The project – focusing on capacity building aspects in the retail sector related to triple transition themes "green, digitalisation and resilience"- began the work in August 2024.

This strategic document elaborates on training needs of new talents for the retail sector through training courses in vocational schools and universities, as well as on reskilling the existing workforce through on-the-job learning and modular short-term courses ensuring the opportunity of lifelong learning. Furthermore, it aims to show ways how the training and learning of retail employees and managers, students, and workers can be accelerated in order to close the skills gaps and considering the comprehensive results of the needs analysis.

The document presents an **initial version of the European Retail Skills Strategy** (deliverable 2.2) using the findings from the project's occupation profiles and training needs analysis (deliverable 2.1) conducted within the first months of the project. There will be periodic reviews of the skill needs and profiles in the retail sector, which also include gathering feedback from training providers and key stakeholders in the labour market. By considering lessons and feedback gained during the pilot phase, the **enhancement of the strategy** will be ensured. This will result in two updates of the strategy being provided in the upcoming phase of the project.

The document starts with showing the **key findings** of the project's occupational profiles and **needs analysis** and explaining the **problem context**.

In the following it discusses **key strategic aspects** related to the following questions:

- How is S4R finding and integrating training content?
- How is S4R making available the training content?
- How will we help retailers attract and retain staff?
- How shall the training content be delivered?
- How to ensure sustainability of training courses?

After that, the strategy provides an **implementation plan** with clear actions and milestones. This will be rounded off with **risks, assumptions and open questions** connected with the implementation of the planned measures.

A summary on the **methodology** applied and **main results of the occupational profiles and training needs analysis** is provided before the document ends with a description of **the selected personas and related learning pathways** which form the basis for the development of the training programme in the upcoming phase of the project.

Context

Key findings of needs analysis

- The focus is not solely on the triple transition themes - moreover, two additional topics, namely "learning how to learn" and "basic core retail skills", are equally or more important to retailers. There is no conflict between these needs; they are complementary and can be integrated into a single curriculum.
- Strategy focuses on up to 5 archetypes of personas and creates learning pathways tailored to each that cover the 5 themes above by mapping the skill needs.

Archetype	Common training needs
Front-Line Employee: • Shop assistant	• Communication and interpersonal skills to engage customers daily • Techniques on how effectively assist and advise customers in the store • Great sales techniques to upsell, cross-sell and efficiently close sales • Understanding of the store procedures and use of point-of-sale systems
Retail manager: • Store manager • E-commerce manager • Sustainability manager • Supply chain manager • Logistics & distribution / fulfilment manager • Information security manager • Loss prevention manager (physical security manager) • Merchandiser • Buyer	• General leadership skills to lead the projects, manage teams, make decisions and solve non-standard tasks • New approaches/ techniques to advance day-to-day operations of their field of specialisation • Regular review of retail trends and understanding of their impact on their operations • Clear understanding of value of training for themselves, their employees, and the business
Supply chain worker: • Warehouse worker • Distribution worker	• Cover basic core retail skills that are common across warehouse and distribution workers.

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	• Focus on adaptability and lifelong learning and creating awareness of both the risks and opportunities of trends like automation
L&D manager: • HR/ L&D manager	• Know how to take ownership of L&D planning more strategically including translating training hours into sales/financial metrics • Understanding approach on how to deliver life-long learning experiences considering innovation cross-industrial trends (e.g. leveraging GenAI) • Learning techniques to removing barriers to training for both employers and employees, including fostering a learning culture • Conduct effective TNAs within the context of the future workforce
Retail newbies: • Student • Career switcher	• Inspiration, myth-busting and awareness about careers in retail • Matching of their talents and passions to dream jobs • Clarity on career paths, earnings prospects, skills, experience and training needed for chosen jobs • Step-by-step guides on how to build the skills, adapt CV and LinkedIn and prep to interview to get jobs

- A lot of retail specific and cross industry triple transition training content is available, which is evidenced by literature review and mapping of retail courses across countries. The strategy's approach is to make available the existing training content and to create new content where required.
- Principally, the analysis identified several barriers to training both for employers and for employees:

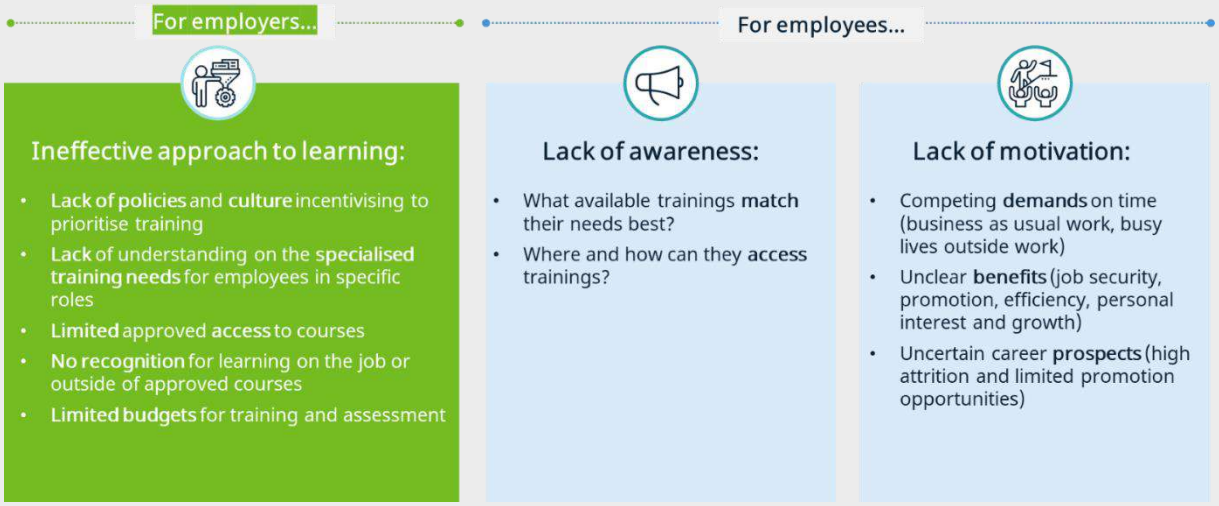


Figure 1 “Barriers to training identified” (source: Accenture analysis)

What problem(s) does S4R need to solve?

- **Existing training it is not integrated into suitable learning journeys** - the target will be to make best use of existing content, map it to learning pathways for key personas and integrate into seamless experience for users.
- **Existing training is not accessible to those who need it most** - make courses available to all sizes and categories of retailers across Europe for free to maximise uptake.
- **Retailers are struggling to attract, retain and upskill staff in face of increasing pace of change, cost pressures and competition from other industries** - S4R attract more staff into the retail sector and boost retention of existing staff by improving awareness of learning, career and promotion opportunities.

What benefits will S4R provide for retailers, workers and governments?

The Skills4Retail partnerships aims to provide benefits for retailers, the retail workforce and the governments.

Benefit	Workers	Retailers	Government
Boost hiring and retention	• Better job opportunities • Improved job security • Potential for career advancement	• Access to skilled workforce • Reduced turnover costs • Increased employee loyalty	• Lower unemployment rates • Increased tax revenue from stable employment • Reduced burden on social services
Increase sales and profitability	• Potential for higher wages • Performance-based bonuses • Job stability due to company success	• Higher revenue • Improved profit margins • Enhanced market position	• Increased tax revenue from higher sales • Economic growth stimulation • Attract more businesses to the area
Improve access to capital	• Potential for company expansion and job creation • Enhanced job security in well-funded companies	• Ability to invest in growth and innovation • Improved cash flow management	• Increased private sector investment • Potential for job creation and economic growth

		• Capacity to weather economic downturns	• Enhanced financial stability in the retail sector
Improve risk management and resilience	• More stable work environment • Better job security during crises • Potentially safer working conditions	• Better preparedness for market changes • Reduced vulnerability to disruptions • Enhanced long-term sustainability	• More stable local economies • Reduced need for government intervention in crises • Improved overall economic resilience
Reduce GHG emissions, bills, waste	• Healthier work environment • Potential for cost savings passed on as benefits • Pride in working for environmentally responsible companies	• Lower operational costs • Improved brand image • Compliance with environmental regulations	• Progress towards environmental goals • Reduced strain on public utilities and waste management • Positive impact on public health

Strategic aspects

How is S4R finding and integrating training content?

- The project proposes to **utilise existing training courses and to develop a small number of new training courses**, aiming to consider knowledge and resources already available. This approach not only saves time, resources and effort but also ensures that industry-proven and effective training materials are utilised.
- The challenge lies in **finding and integrating content** that can be made widely accessible to retailers of all sizes, across all categories, and throughout all segments of the value chain, and for retailers operating in several countries across the EU. This will be subject of WP3 and WP4 of S4R in the upcoming phase.
- WP3 will **map existing retail courses** addressing budget constraints by prioritizing accessible content through a structured process, as follows:
  - Mapping content by cost: free, low cost, high cost.
  - Initially use only free content.
  - Introduce low-cost content later.
- Based on this, WP3 will **design a VET training programme**, including:
  - Learning materials,
  - Delivery methods,
  - Train-to-trainer approach,
  - Training principles,

  pulling together content from multiple sources into a single user experience. Planned outputs of WP3 are shown in the following:

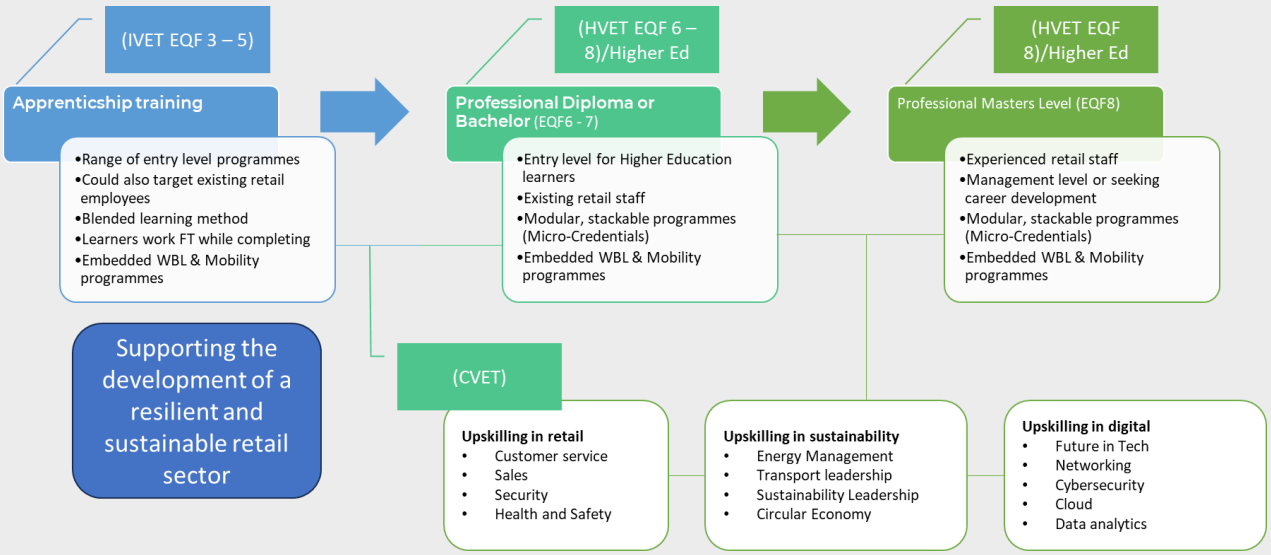


Figure 2 "WP3: S4R curricula and outputs (source: SkillNet Ireland)"

- WP3 will **learn lessons from experience** of WP4 on the **implementation of piloting**.
- **Pilot VET training** will be implemented as part of Work Package 4 (WP4), addressing both urgent/reactive and long-term skills requirements in the retail sector. The initiative consists of two main components.
  - First, a reactive training programme will commence in September 2024, targeting the existing retail workforce to address immediate skills needs.
  - Second, a more comprehensive VET curriculum for emerging trainings, developed based on extensive research conducted in Work Package 2 (WP2), will be piloted starting in autumn 2025.
  - This phased approach ensures that pressing skills gaps are promptly addressed while simultaneously developing sustainable, research-informed training solutions for the long term.
  - The reactive training programme plans to implement the following training courses starting in September 2024:
- WP 4 develops a responsive and timely program for upskilling and reskilling. To achieve this, S4R training providers identified and verified existing courses that align with S4R requirements. **Implementation of these courses is scheduled to begin in autumn 2024**. The following list shows the courses identified and planned:

Country	Partner	Main topic	Modules
ROMANIA	University of Bucharest	Digital marketing essentials	Introduction to digital marketing Website essentials Search engine basics Social media fundamentals Content marketing basics Email marketing essentials
		Human skills	How to build resilience in retail Effective leadership and retail teamwork Collaboration tools and communication in retail Sector Critical thinking and effective decision making Problem solving skills in retail sector How to improve emotional intelligence
		E-commerce essentials	Introduction to e-commerce Setting Up Your e-commerce business Choose the right CMS or online platform Product selection and sourcing Digital marketing for e-commerce. Set up smart PPC (Pay-Per-Click) campaigns Payment processing and security Fulfillment and logistics Analytics and optimization
	Economic College Nicolae Kretzulescu	Green skills	Introduction to sustainable retail Sustainable procurement practices Energy efficiency and responsible use of resources Communication and consumer education Social responsibility and equity Implementation of green practices in retail Examples of good practices and case studies

		Resilient retailing	Introduction to resilient retailing Risk and opportunity assessment Resilience strategies in retail Crisis and unforeseen event management Organizational culture and leadership Customer experience and satisfaction Case studies and practical examples The future of retail and emerging trends Practical application in a specific retail scenario
HUNGARY	Szent György Hang- és Filmművészeti Technikum	Digital marketing essentials	Basics of digital marketing Search engine optimization (SEO) Search engine marketing (SEM) and Pay-Per-Click (PPC) Content marketing Social media marketing Email marketing Data-driven marketing and analytics Future trends and innovations
		Digital skills for retail	Digital transformation in retail E-commerce and online sales Digital marketing strategies Customer experience and digital customer service Data management and data privacy Mobile commerce and applications Future trends and technologies
		E-commerce essentials	Basics of e-commerce Setting up an online store Payment gateways and security Digital marketing for e-commerce Managing inventory and fulfillment Customer service and retention Analytics and performance measurement Trends and innovations in e-commerce

		Resilient retailing	1) Business management process Experience economy and customer experience Customer journey mapping Product life cycle and customer Journey AI and future: improving the experience of clients 2) Customer segmentation Definition and objectives Main aspects of customer segmentation Behavioural segmentation
		Human skills	Importance of human skills in retail Communication skills Customer relations and customer service Emotional intelligence (EQ) Teamwork and collaboration Leadership skills and motivation Problem-solving and decision-making Learning and development in the workplace
AUSTRIA	WKO-WIFI	Digital skills for retail	Digital marketing - introduction and overview Website and SEO/SEM E-commerce and newsletter marketing Online and mobile advertising, apps Social media marketing Content marketing Creative conceptualization Integrated communication workshop, multi- and omnichannel marketing Workshop: project work coaching
		Resilient retailing	Basics of complaint management Basics of customer-oriented communication in complaints Techniques in complaint management

How is S4R making available the training content (dissemination)?

- WP3 will **deliver training content in SCORM format**.
- The training material will be made **available for download from the project's website** as we do not intent to develop or to make use of a uniform learning platform.
- WP5 will create the website and platform for download of training content. It also elaborates a process to ensure localised content as the training material will need to be nationally integrated into learning platforms available for the retailers across EU-countries. Specific attention will be laid on developing processes to ensure a seamless user experience, personalised learning journeys, and the updating of the training courses nationally in due time.
- WP3 will define a **train the trainer approach** supporting implementing training providers.
- WP4 will pilot the courses and the train the trainer approach with retailers, educational institutes and learners across EU countries.
- WP5 will align with **Pact4Skills** and other initiatives to engage retailers across Europe.
- The initial dissemination strategy is to make training available to download for free in SCORM format on the S4R website. SCORM is a format which is expected to enable compatibility with diverse learning platforms - but demand for downloading courses by retailers and training institutes and compatibility with **multiple platforms** are key points that will be tested in practice during S4R pilots.

  The table below outlines our **key audiences**, how they will access training, their likely demand, willingness to pay and potential barriers.

Audience	How will they access the training?	Unmet demand for training?	Willingness to pay for training?	Other potential barriers or constraints?
Large retailers	**Direct or indirect** Download in SCORM format, load into training	**Medium** - they will have existing training but may have partial gaps esp. on triple transition themes	**Low** - while they have significant training budgets, because they can get training for free from the S4R	**Medium** - they may face issues adopting new training that has not been designed in a bespoke way

	systems, get train the trainer support OR Access via training providers		website and have their own systems to use it – they are less likely to pay VET/HEs to access it	to fit in with their existing curriculum, policies, roles and countries. They may use existing training suppliers and have formal procurement processes that act as barriers
Small and medium retailers	**Indirect only** Most will only be able to access S4R training via VET/HE institutes and only if they pay for it (unless they have their own training systems to handle SCORM formats)	**High** – most have no current access to a 'turnkey solution' for training on core retail skills, learning to learn and triple transition and have urgent need for this	**Low** – many have no training budget or it is very limited so they could be very sensitive to pricing by VET/HE institutes	**Low** – fitting in with existing training may be less of an issue but engaging them requires active outreach campaigns led by S4R or the VET/HEs
Training providers (VET/HE institutes)	**Direct only** Download in SCORM format, load into training systems, get train the trainer support	**N/A** – they have no intrinsic demand and will only incur cost and effort to adopt our courses if they believe many retailers in their country will be willing to pay for it	**N/A** – they can download SCORM format courses for free	**Medium -** the effort and cost of integrating this into their curriculum, marketing it to retailers and training the trainers is significant and needs to be lower than their forecast income in a short payback period
Individuals (students and employees)	**Indirect only** Only via retailers or training providers	**High** – few existing courses are turnkey solutions with pathways covering retail basics and triple transition	**Low** –employees and students may only be willing to pay VET/HE institutes for much longer and more in	**High** – they are completely reliant on their employer or local VET/HE offering S4R courses in the

	tailored to frontline roles, managers, career switchers or young people considering entering retail etc.	person training courses like degrees. While they are unlikely to pay for S4R courses a standalone proposition, integrating them with existing courses could increase willingness to pay or attract new students	current distribution model and cannot access them directly.

- These are critical considerations related to our initial dissemination strategy. The audience who can access training directly are those with Learning Management Systems (LMS) - for example large retailers and VET/HE institutes.

  Most small and medium sized retailers will be reliant on their local VET/HE institutes or other training providers offering our courses to access them. All employees will be reliant on their employers to access them or could access via a VET/HE if they are willing to pay individually. Students will be reliant on a VET/HE institutes or other training providers and will need to pay individually either for S4R standalone courses or for existing longer qualifications such as degrees, which S4R courses are used to enhance.
- **Lessons and feedback from pilots** will inform the strategy updates if this process of making training materials available needs to be refined.

How shall the training content be delivered?

- WP3 will define the mode of training delivery for each course, **aiming to shift to online and blended learning** and away from traditional in person training (as indicated in the needs analysis). It will be subject to the design process of the S4R's training programme if each module suits best to online or offline learning mode.

- The main target is that online learning will be the default format due to its flexibility and accessibility. Learners will have the convenience of accessing training materials and resources online, allowing them to learn at their own pace and convenience. This format also enables learners to engage in training regardless of their location or time constraints.
- There are **certain skills or topics in retail that require hands-on practice or in-person instruction**. In such cases, in-person modules will be incorporated into the training programme. These modules will provide learners with the opportunity to acquire specific skills that cannot be effectively taught through online methods alone.
- The objective will be to design it in a way that allows learners:
    - to access the content whenever they need it. This flexibility accommodates the busy work and personal schedules of employees, ensuring that they can engage in training at their own convenience.
    - to have control over their learning journey, enabling them to choose the topics and skills they need to focus on. This approach also recognises that individuals have different learning styles and preferences, allowing them to learn in a way that suits them best.

How will S4R help retailers attract and retain staff?

- Provide a comprehensive training program (develop a modular curriculum covering various aspects of retail, from customer service to advanced retail management, including core retail skills and triple transition themes).
- Offer certifications upon completion of training courses:
    - Develop certifications that are recognised across the retail sector
    - Partner with industry associations to ensure certification credibility
- Consider a multi-channel learning approach:
    - Provide a mix of online courses, in-person workshops, and on-the-job training
    - Ensuring access to training content in SCORM format
    - Developing learning pathways matching the skills needs
- Forming partnerships with educational institutions:

- Collaborate with schools, colleges and universities to integrate retail-specific courses
- Provide customised training for small retailers:
  - Develop specific modules addressing the unique challenges of small and micro retailers
- Focus on technology and innovation:
  - Include training on emerging retail technologies (e.g., VR, AI-driven customer service)
  - Offer courses on e-commerce and omnichannel retail strategies
- Ensure continuous learning and development:
  - Implement a system for ongoing skill assessment and personalized learning recommendations
  - Provide regular updates to training content to reflect industry trends

How to ensure sustainability of training courses?

Training courses developed will be implemented within the S4R's project period after it was tested, and improvements adapted. The sustainability of the training courses considers a range of different aspects:

- Evaluation: Regularly assess the effectiveness of the training courses through feedback from participants and stakeholders. This will help identify areas for improvement and ensure that the courses remain relevant and valuable. An evaluation process will be developed in connection with the design of the training programme.
- Updating and adapting: Keep the training courses up to date with the latest industry trends, technologies, and best practices. This will ensure that the content remains relevant and valuable to the learners. WP2, based on outcomes of WP3 and WP4, will provide updates of the skills strategy twice within the project period.
- Administration of courses: administering the courses on a platform and providing as well operating the required resources and budget for it. WP5 will provide a platform on S4Rs website for accessing the training courses.
- Accreditation and certification

The project aims to:

- establish a long-term sustainability plan for funding, dissemination, and training programs;
- align training programs with EU frameworks such as EQF, ESCO, EQAVET, and EUROPASS; and
- create a sustainable learning program that meets EU retail skills standards.

The **sustainability strategy** of S4R (separate document) discusses details of accreditation and certification for the training programme to be developed.

In that context, it has been indicated that despite its benefits for enhancing credibility and recognition, the complexity, nature and cost implications of **accreditation may make it less suitable for this project**. But it should not be excluded, and it will be assessed during the design of the S4R's training programme. Certification, in comparison, offers immediate recognition and credibility, making programs more appealing to students and employers without the extensive costs and complexity associated with accreditation. Therefore, **certification seems to be a more feasible and efficient** selection for improving the recognition and credibility of training programs within the project.

There are S4R partners, such as the University of Bucharest, who are experienced in that matter, i.e. with shorter programmes such as micro-credentials modules which can be accredited in a shorter term (i.e. in less than a month).

The long-term **goal includes a formal certification in all countries**, providing valuable credentials for career advancement and contributing to EU policy objectives to enhance the attractiveness of vocational education and training (VET) and careers in retail, as well as of lifelong learning. This may involve implementing stackable micro-credentials providing formal recognition of acquired knowledge without requiring excessive time commitments, and it allows learners to combine micro-credentials into longer awards under vocational education and training (VET) or higher education.

Work package 3 of the project aims to ensuring the recognition of acquired **micro-credentials** and certifications at both the European Union and national levels.

Further details in regard to accreditation and certification, for example how to obtain it etc., are included in the S4R's sustainability strategy (separate project document).

Implementation aspects

What is our implementation plan?

The integrated implementation plan contains **seven workstreams**. Three workstreams relate directly to the skills strategy and are shown below (with activities highlighted in orange and milestones in blue cells). The full plan is in Appendix 3 "3_S4R_ Retail Skilling Strategy Integrated Implementation Plan". Please note that this is a **living document**, which is continuously updated.

Year	2024		2025				2026				2027			
Quarter	3	4	1	2	3	4	1	2	3	4	1	2	3	4
Workstream 1: Design, maintain & improve the curriculum (WP2 & WP3) **Owner: Skillnet**														
D 3.1. Core VET Curriculum of emerging courses designed														
Agree a viable number of pathways and modules to create														
Prioritise personas and engage representatives to understand their individual training needs and barriers (e.g. 3 - 5 people per persona)														
Co-design the learning pathways and modules in the chosen format with representative learners (test & iterate)														
D 3.3. VET Training programme designed (Phase 1 - Materials for Pilot Training)														
Design, test and launch "train the trainer" approach in collaboration with VET/HEs for pilots														
Reach out to all partners and scan available open source material, map content to design and identify specific needs for content access rights, translation and creation														
Agree partners to own content access, translation and creation, effort allocations and timelines and prioritise opportunities within these constraints to fill content gaps														
D 3.3. VET Training programme designed (Phase 2 - Ready to Use Training Materials)														
Finalise learning pathways with a defined number of modules for each persona														
Capture lessons and improve content, platforms, train the trainer etc.														
Estimate effort required and prioritise opportunities														
Allocate roles and execute on improvements / new content creation / new personas and pathways														
Workstream 2: Coordinate the rollout of training courses (WP4) **Owner: JA Europe**														
Confirm participation process for beneficiaries														
Promotion of the 8 training programmes in Austria, Hungary, Czech Republic, Latvia, Romania, Ireland, Malta, Portugal started														
Identify and onboard VET training providers and HEI to deliver the trainings (16)														
Identify and approach employers (in collaboration with WP1) to participate in mentorship, job shadowing, apprenticeships, or job placement opportunities for graduates (50)														
Identify beneficiaries in close collaboration with education institutions & companies (800)														
Pilots across the 8 countries (training and facilitiation to employment) launched														
"Train the trainers" for VET training providers and HEI to deliver the trainings (if necessary)														
Provide support to VET training providers and HEI														
Collaborate with participating employers to create pathways for at least 300 upskilled workers to start new or enhanced roles within their current organizations														
Capture lessons and improve content, platforms, train the trainer														
Promotion of the 8 training programmes (Ready to Use Training Materials) across EU started														
Provide support to start in new countries														
Workstream 7: Review evidence, capture lessons and publish Retail Strategy updates (WP2) **Owner: WKO**														
Skills Strategy updated														
Gather evidence and capture lessons														
Refresh Training Needs Analysis														
Review evidence and lessons, discuss open questions and update strategy (first informal, second formal)														

"Implementation plan for WP2, WP3, WP4 workstreams"

Additional four workstreams relate primarily to the "Sustainability Strategy" (WP6) - but are deeply interconnected with the three workstreams above and are shown below to illustrate interdependencies.

Year	2024		2025				2026				2027			
Quarter	3	4	1	2	3	4	1	2	3	4	1	2	3	4
Workstream 3: Develop a sustainable funding model and expand the S4R Alliance (WP6) **Owner: JA Europe**														
Partnership strategy finalised														
Develop propositions - i.e. membership tiers and pricing for tier 1 partners (large international retailers, national retailers, VET/HE institutes, government ministries)														
Engage 3 - 5 representatives from each type of tier 1 partner, gather feedback on propositions and test willingness to pay and refine the propositions														
Design the governance model														
100 partners onboarded by end of grant period														
Map where we already have partners by country and estimate additional effort required to engage 1 retailer, 1 VET/HE and 1 public institution per country x 33 countries														
Confirm if it is possible to reach the goal of 100 partners by Sep 27 taking a country-by-country approach with the resource available														
Prioritise countries (e.g. first fill all 3 slots in the 8 countries, then fill where we have 1 or 2 exisitng partners present, finally fill where we have none)														
Engage initial set of paying members (e.g. subset of retailers in IAB + VET/HE institutes in Consortium) and set up new governance model														
Execute on partner engagement (till we reach 3 partners per country x 33 countries + any additional members)														
Workstream 4: Secure new public grant funding to subsidise innovation and expansion (WP6) **Owner: Schuman Associates**														
New grant(s) to fund country expansion secured														
Research and prioritise grant opportunities that match our needs (e.g. what EU and national grants might fund expansion into new countries vs. innovation)														
Shape grant application proposal, estimate the implementation costs, engage partners, allocate roles and budgets and submit the bid														
Review lessons from initial round of applications and adjust approach for future														
New grant(s) to fund innovation secured														
Shape grant application proposal, estimate the implementation costs, engage partners, allocate roles and budgets and submit the bid														
Review lessons from initial round of applications and adjust approach for future														
Workstream 5: Develop an efficient approach to certification and support VET/HE applications (WP6) **Owner: OTB**														
Certification Strategy finalised														
Evaluate via targeted interviews if retailers and students value certification by national bodies highly enough to justify the time and cost of achieving it - or if another solution (e.g. recognition by Eurocommerce + IAB members) is a better practical alternative														
Evaluate if achieving certification is possible if all courses are uploaded to a third party learning platform														
Define the approach to achieve certification at EQF level 3-8														
Develop the micro-credential approach														
Support achievement of certification														
Based on approach chosen - identify the relevant national and / or EU certification bodies, retailers / VET/HE partners, allocate roles in the certification process, estimate effort / cost required from each of them and secure commitments or adjust plans until all partners are agreed														
Workstream 5: Review evidence, capture lessons and publish strategy updates (WP6) **Owner: Schuman Associates**														
Sustainability Strategy updated														
Gather evidence and capture lessons														
Review evidence and lessons, discuss open questions and **informal** update of the strategy														
Review evidence and lessons, discuss open questions and **formal** update of the strategy														

"Implementation plan for WP6 workstreams"

What will we harness GenAI, other technologies and training methods?

- Generative AI (GenAI) is reshaping the landscape of retail, creating new training needs across the sector. Recognizing this shift, GenAI is being incorporated as a crucial component of digital literacy training for all retail workers. This approach ensures that employees at all levels are equipped to navigate the evolving technological environment of modern retail.
- Particularly, leaders and managers in the retail industry need to **develop an understanding** of how GenAI specifically impacts their sector. This knowledge is essential for making informed decisions, developing strategies, and guiding their teams through the **digital transformation**.
- Beyond the subject of training, GenAI also presents significant opportunities in the **creation and management of training content** itself. It can be leveraged to map existing educational resources, create or update training videos and text materials, and even assist with translations. This application of GenAI in content creation has the potential to streamline the training process, making it more efficient and adaptable to the rapidly changing needs of the retail workforce.
- Further **modern learning tools** have revolutionised the way of transferring knowledge and skills. With the advancement of technology, traditional methods of learning have been replaced by innovative and interactive platforms that cater to the needs of learners and support the motivation to learn. This implies for example the following:
    - Implementing bite-sized learning modules, such as short videos, interactive experiences, or summaries, will facilitate focused learning within the given tight work and private schedules of the workforce. It ensures that it can be easily consumed and accessed on-demand by learners.
    - Incorporating game elements, such as points, badges, leaderboards, and challenges, into the learning experience to increase motivation, engagement, and retention. Gamification adds a sense of competition, making the learning process more enjoyable and immersive.
    - Encouraging learners to engage in group activities, discussions, and projects to foster collaboration, knowledge sharing, and social interaction. Collaborative learning promotes active participation, critical thinking, and the development of interpersonal skills.

- Immersive technologies that create simulated environments or overlay digital information onto the real world. The usage of VR and AR can be assessed as it provides realistic and interactive learning experiences, particularly in fields that require hands-on training or visualization.

WP3 will determine which technologies and modern learning methods are suitable and recommended for the training program's development. Note that S4R has limited resources and capacities available to make use of modern technologies and methods. Furthermore, the need to localise S4R content may result in varying requirements for learning platforms across different countries.

Which time horizon is best to consider for the skills strategy?

The triple transition themes, with a particular emphasis on digitalisation, have experienced and continue to undergo a dynamic development of emerging skills, new roles, and innovative training methodologies as well as technologies. This constrains the strategic outlook. Consequently, the time horizon of the skills strategy should be limited to the **year 2030**, acknowledging the need to adapt to the rapidly changing landscape.

What risks and open questions do we identify?

General risks and assumptions, as stated in WP6 related to the **sustainability strategy**, can influence the success of the S4R project as a whole from the beginning and have to be considered for the skills strategy as well. These assumptions and dependencies are discussed in detail in the project's sustainability strategy document (D6.1) and, therefore, will not be included here again.

The following table presents the **risks associated with the skills strategy**, including initial ideas for mitigation and management. Further assessment will be undertaken by the S4R project during the development of the training programme in WP3 and through lessons learned and feedback from the piloting in WP4.

Category	Risk	Severity	Likelihood	Risk mitigation/ management plan
Certification and accreditation	Retailers do not know about certified courses and/or do not have the capacity - just skilling outcomes	Moderate	Moderate	Provide certification templates for each S4R course covering the requirements of micro-credentialing Supporting and work together with national training providers implementing certification requirements, e.g. through a guideline/manual
	Getting accreditation will take too long and cost too much	Low	High	
	Harmonising it in every country is challenging, also in terms of re-certification after refreshing the content on every learning platform	Moderate	Moderate	
Finding existing training courses	Access to existing training material requires resources and S4R's are limited	High	Moderate	Efficient coordination between the S4R's partnership to make available all potential resources Conduct a survey across countries engaging additional training providers/resources
	Finding existing training material relevant for S4R across EU	Moderate	Low	
	Existing training material found will not fit together for S4R's purposes	Low	Moderate	Adapt training material for S4R's purposes Do not use training material found, instead develop new material relevant for S4R's purposes
Curriculum design	S4R course content will not fit into existing wider training curricula from	Moderate	Moderate	Train-the-trainer courses and guides supporting and minimising efforts

	VET/HE institutes or large retailers in a way that gives a seamless experience to learners			to be made adapting course content by VET/HE institutes Develop a plan to potentially migrate the approach to make available training content to a single learning platform of S4R in a longer perspective
Making available S4R training courses	Making available training material in SCORM format for download requires an appropriate platform and S4R may not have the resources to provide this	High	Low	Efficient coordination between the S4R's partnership to make available all potential capacities of training providers operating a learning platform Set clear responsibilities administering the platform Making available external partners who are technology providers considering the limited resources of S4R - and considering finding sponsors in the retail industry to make funds available Promoting newly developed S4R training courses and closely
	Administrating the S4R download platform requires resources and S4R needs to provide that (also after the project closure)	High	Moderate	
	Ensuring smooth download at different learning platforms in the countries in terms of technical compatibility	Moderate	Moderate	
	Small retailers are reliant on VETs/HEs providing S4R training courses on their learning platform(s) Large retailers and VET/HEs may be reluctant to download courses in SCORM format for free	Moderate	High	

	because they will incur a lot of internal effort and cost to integrate them with existing training			cooperate with VETs/HEs as well as other training institutes across EU Develop a plan to potentially migrate the approach to make available training content to a single learning platform of S4R in a longer perspective
Refreshing training courses	Making provisions for considering updates of training courses requires resources which is not available in particular after the closure of the project	Moderate	High	Making funds available through seeking partnerships with large retailers sponsoring the sustainable implementation of the S4R training programme Promoting the S4R training programme and engaging retailers using the training materials enhances the motivation to update the localised content
	Ensuring the localised update of training materials may fail as the national/regional providers in the countries do not take over the updates	Moderate	High	
Creating new training courses	S4R partners may not have sufficient resources to create training courses responding to all skill needs identified	Moderate	Moderate	Prioritise course development, Partnering with specialists capable to provide required training courses Train-the-trainer approach
	S4R partners do not have expertise to create training courses with specific subjects	Moderate	Moderate	

				Use of AI for content creation Seeking for sponsors in the retail industry providing required funds
Learner's perspective	Not using one learning platform may cause a different/adapted learning journey across the countries and it may hinder a seamless user experience	Moderate	Moderate	Set minimum requirements/standards for delivering the content Support with a standardised user guide
	Small retailers may have no capacity or resources to access to training	High	Moderate	Monitor the provision of localised content Provide a cross-platform support team Develop a plan to potentially migrate the approach to make available training content to a single learning platform of S4R in a longer perspective

What are our open questions?

One key open question is **how flexible is our dissemination strategy**? This is for example related to:

- How to engage retailers (all sizes and categories)?
- Will SCORM formatted courses work with all VET's/HE's and other training provider's systems?

- How to make it available – in particular for smaller retailers who do not have access to learning platforms and potentially need to pay fees for external providers?
- Will content from multiple platforms technically and administratively work together?

Possibly in the longer term, one option to evolve our dissemination strategy is to move all S4R courses onto a single learning platform (e.g. Coursera, Udemy, Udacity, edX). This could make courses directly available all small and medium sized retailers and to all individuals, greatly expanding the reach and transforming the business model opportunities. It would create a more seamless, personalised and interactive learner experience. It would enable better tracking of progress at the individual level and better understanding of overall S4R training programme impact. It could reduce cost to access, maintain and improve courses for all. In the long run, it could make it easier to integrate our courses with many others available on the platform, to benefit from advances in learning technology (e.g. use of GenAI for content curation, creation, integration and learner support, use of Augmented Reality to create immersive and interactive virtual learning environments).

However – within the pilot, this is not the approach we will use and S4R will not charge any fees to access S4R course content. Moving courses onto a single platform is only one longer term option we will evaluate and will require further exploration as we learn from the pilots. If there is strong demand and relatively few problems we cannot resolve with the SCORM download model, then this could be the long term strategy we stick with, but we would also need to compare this to how much faster adoption might grow under different possible models. Even if it a new dissemination strategy is decided upon as a desirable future vision supported by the S4R Steering Committee, Industry Advisory Board, funders and retailers – it will be dependent upon business case evaluation and raising additional funding (either from membership fees or from a new grant).

S4R's long term growth strategy options and associated considerations are further described in the S4R Sustainability Strategy (D6.1).

Further questions to be addressed by WP2 updating the strategy during the project, in collaboration with WP3 responsible for the design of the training programme and WP4 implementing the pilots, include:

- How to find and integrate training content into S4R, incl. how will the content from reactive training courses be integrated into the emerging courses?
- Will it be possible to skip some or all modules (what is mandatory or optional)?
- How will we update training content without invalidating certification?
- How will the testing with retailers and learners being implemented?
- What will the learning outcomes be?
- How many training courses will there be?
- What will the modules be and the level of proficiency each module be aimed at?
- Are we going for accreditation or are we applying micro-credentials?
- What modules will be online or offline, and how will in-person training across be implemented?
- What is the optimal duration for each course and how long will each module be?
- Will there be an upfront individualised skills assessment / training needs assessment exercise available to learners - to enable personalisation of recommended training modules?

'Occupational Profiles & Needs Analysis'

The Skills4Retail partnership has implemented an occupational profile and skills needs analysis and is addressing the urgent and emerging skills needs in the retail sector in the areas of digitalisation, sustainability and resilience by developing a new skills strategy and training programme. This separate project document followed an analytical process to identify the needs and weaknesses in the existing occupational profiles as well as the demand and need for training for the European retail sector workforce. The following two chapters summarise the main aspects of the methodology chosen and questions considered.

What assessment methodology has been chosen by S4R?

To achieve a target-oriented analysis for the S4R's purposes, a variety of sources was applied, including strategic consultation, secondary research as well as primary research.

The diagram below gives an overview of the methodology:

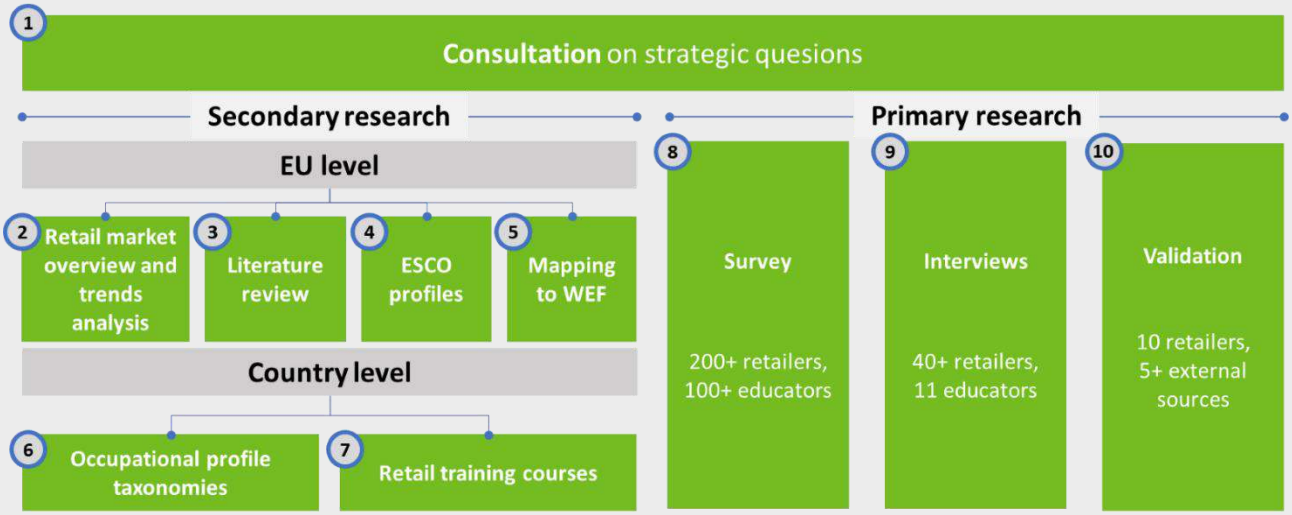


Figure 3 "Overview of methodology" (Source: Accenture)

(1) Consultation on strategic questions

To set a clear practical direction for the analysis, 16 strategic questions about the S4R programme were created, discussed and aligned during a series of group consultations (for details, see our "Occupational Profiles and Needs Analysis").

(2) Retail market overview and trends analysis

To inform strategic direction consultations and understand the impact of retail market conditions on the talent landscape, we conducted a comprehensive market review and trend analysis (for details, see our "Occupational Profiles and Needs Analysis").

(3) Literature review

To obtain a holistic overview of the retail market, trends and methodology, 17 reports have been selected across three key categories: retail-specific ones, cross-industry and EU skills blueprints:

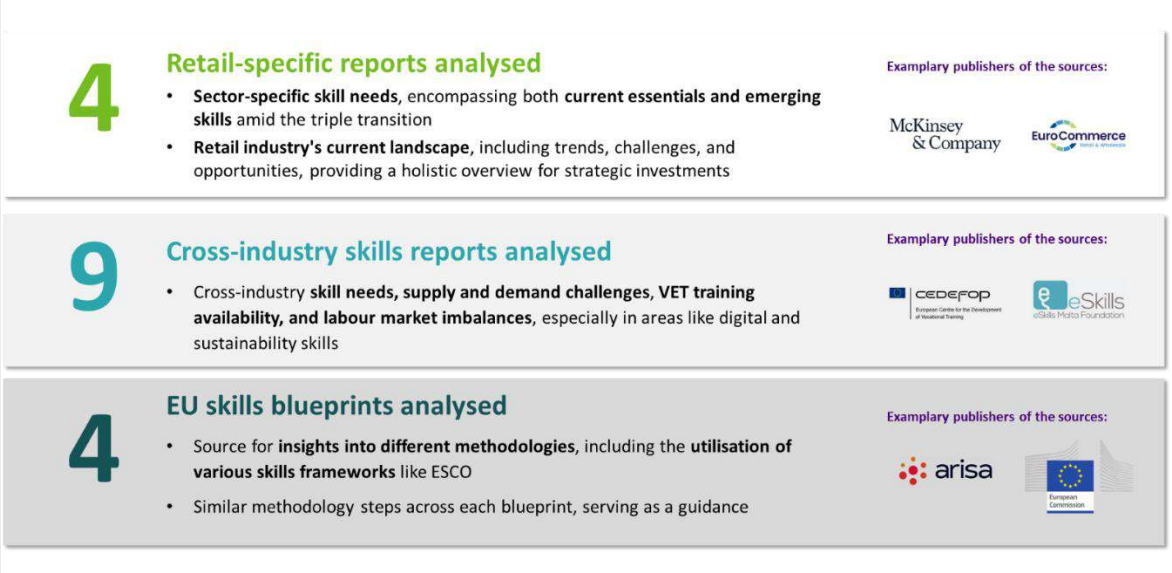


Figure 4 "Summary of resources for literature review" (source: Accenture analysis)

For details, see our "Occupational Profiles and Needs Analysis".

(4) ESCO profiles mapping and prioritisation

To identify the most important occupational profiles in retail, we started with the ESCO list of 3,000+ occupation profiles, identified 120+ profiles relevant to retail and took a data-driven approach to prioritisation. An iterative process refined the list to a 'top 10' list to build 'one-page' summary profiles including descriptions, education levels, current skills needs, and key changes expected by 2030. This process of refining was based on de-duplication and feedback from retail market experts. The 10 profiles were validated directly with retailers who are major employers specifically for each of them (for details, see our "Occupational Profiles and Needs Analysis").

(5) Review of skills taxonomies and rationale for using WEF

From the above analysis, it was found that ESCO contains around 13,500 skills, which are not standardised and often overlap. This posed a challenge in achieving a cohesive analysis and deriving reliable insights. We have analysed a few alternative taxonomies (ISCO, ISCED, WEF, LinkedIn, ILO, Bloom, SFIA, 21st Century Skills and DigComp) and the WEF taxonomy has been selected for further mapping of skills. The decision has been made to use WEF taxonomy due to the following rationale:

- The WEF skills framework is more structured; features 50 skills and 33 attitudes, providing easier navigation.
- WEF is internationally recognised and future-oriented (reskilling revolution 2030); it addresses the changing nature of work and skills demand in the global economy.
- WEF covers all areas of triple transition, making it convenient for further training modules creation.

For details, see our "Occupational Profiles and Needs Analysis".

(6) Occupational profile taxonomies across countries

To assess localised taxonomies, secondary research has been conducted by project partners to gather the existing occupational profiles in different countries (for details, see our "Occupational Profiles and Needs Analysis").

(7) Retail training courses across countries

To analyse localised supply of training, secondary research has been conducted by project partners to gather the existing training courses in retail in different countries (for details, see our "Occupational Profiles and Needs Analysis").

(8) Survey

In the first part of the primary research, a survey was created and disseminated among retail industry players as well as educational institutions. Responses were gathered from 293 retailers and 90 VET institutions. Respondents were asked to rank the training needs as well as training completion

(among either their employees or students, depending on the respondent type) for each of the 27 previously selected key skills divided in six main categories.

For details, see our "Occupational Profiles and Needs Analysis".

(9) Interviews

There were 52 interviews conducted among top retailers and VET & HE institutions from eight European countries (Austria, Czech Republic, Hungary, Ireland, Malta, Latvia, Portugal, Romania). Most of the interviews were conducted with retailers (79%) and the rest with VET/HE institutes (21%).

The interview questions focused on identifying:

- The challenges in the retail sector regarding the triple transition topics: green/sustainability, digital and resilience
- Emerging jobs and roles
- Knowledge/skills needs
- Training courses and modes
- Academic certifications such as micro-credentials

For details, see our "Occupational Profiles and Needs Analysis".

(10) Validation of top 10 occupational profiles

The profiles were verified with one of the significant retailers from various subsectors from all over Europe, and after the consultations, two additional sections with skilling insights were added:

- What new training will be most needed by these staff from now to 2030?
- What practical barriers may stop them accessing training?

For details, see our "Occupational Profiles and Needs Analysis".

What stakeholders were identified?

The Skills4Retail project involves various stakeholders in the sector of retail and capacity building:



Figure 5 “Skills4Retail Stakeholder mapping" (source: WKO - adapted from sustainability strategy)

S4R stakeholder mapping	
Trainers	Provide training, incl. material. Online as well as hybrid and face-to-face trainings.
VET/HE institutes	Organisations who provide training measures and programmes. Note: while non-accredited institutes can be customers, only accredited institutes can be partners.
Certification bodies	Responsible for certification of training programs (ISO, Ministries, etc.)
Public sector bodies	This includes ministries or specialist national agencies responsible for the skilling agenda in their countries as well as regional government institutions.
Trade unions	…as representatives of retail employees and of education organisations.
Retail associations	…as representatives of retail employers.
Retailers	Companies in the retail sector. Note: while SMEs can be customers, only large national or international networks can be partners.
Specialists	All other not mentioned, experts, institutions or bodies, who may be involved, e.g., research centres.
EdTech companies	…as owners of online learning platforms.
Research centers	Providing research material for market and labour market analyses
Chambers	Provide sector information and a wide network of stakeholders (e.g. companies, trade associations).
Marketing agencies	Provide marketing material for the training courses.
EU-commission	Responsible for grants and project quality/financial control in the European Union.

How is the situation of the retail market?

The retail sector was once characterised by a predictable operating landscape. Nowadays, it faces a number of disruptive factors.

- Global economic growth trends, reflected in declining household spending, are impacting the industry.
- Supply chain disruptions stemming from ongoing conflicts and pandemic aftershocks.
- Rising interest rates are not only affecting the flexibility of the retail sector but also the ability to invest.
- Investments in automation technologies and cybersecurity systems are on a rise, positioning retail well in the marked but causing transformation changes in the retail environment.
- Challenges to overcome barriers to training for both employees and employers.
- Retailers have harnessed technology across various domains, from store operations to consumer analytics.
- Artificial intelligence (AI) has emerged as a game-changer, with executives actively exploring its potential within operations.
- Changing consumer behaviour causes technological transformation and new competences in retail, e. g., mindful shopping and cost-consciousness, digital and omnichannel adoption, or dynamic development in personal preferences.

In this dynamic environment, continuous adaptation and improvement are essential.

As a consequence, the retail environment is becoming increasingly challenging and the labour market is becoming tighter - e. g. a result of an ageing population, declining birth rates and competition. This also results in a shortage of talent, which presents an additional hurdle for retailers to overcome.

Furthermore, there are multiple viewpoints of the retail market structure that can be considered, such as the number of employees, the level of turnover or the value added to the sector. Retail is a significant economic sector in Europe, encompassing enterprises of various sizes.

The needs analysis took into account various perspectives, including the future outlook for the trend towards larger or smaller retailers, as well as relevant developments in new retail categories (refer to the figure below).

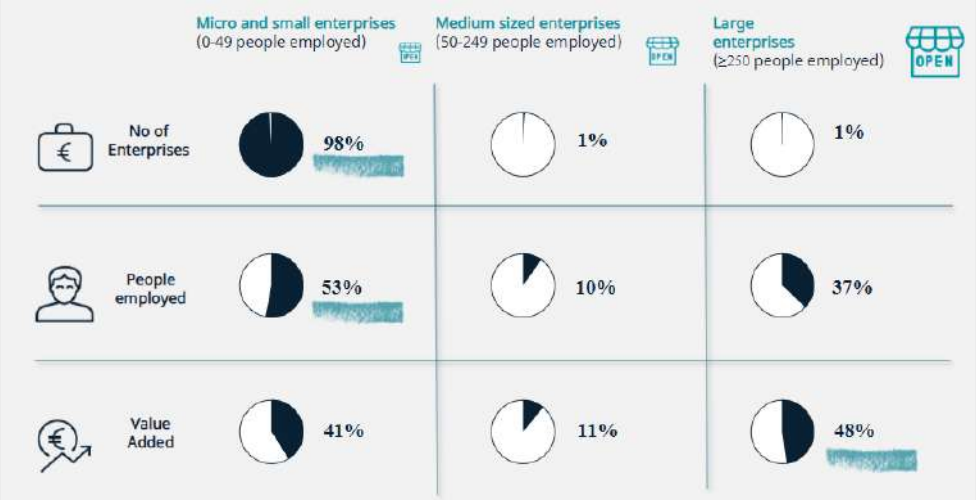


Figure 6 "Perspectives of sizes of retailers" (source: Accenture analysis)

The figure shows that micro and small enterprises with up to 49 people employed are the largest number of enterprises in retail (98%) with the most people employed (53%) and offer an added value of 41%, almost as much as large enterprises with 48%, compared to medium sized enterprises with only 11% added value. Medium sized enterprises and large enterprises only comprise 1% of the retail market each. Still, large enterprises have a much higher percentage of people employed (37%) than medium-sized enterprises with only 10%, and medium sized enterprises only offer 11% of added value. Value added can be in service, expertise, exclusivity, convenience, and experience.

For instance, eight of the top 10 retailers are in food and grocery, however, there is also a considerable number of retailers in various other categories, e. g. clothing & apparel, health & beauty, or home.

What main challenges of retail market were identified?

The Skills4Retail partnership accelerates the topics of the triple transition - green, digital and resilient - in retail. The programme aims to help retailers in Europe take on the current and future challenges and ensure the sustainability of their business models through focusing on the following themes:

- Attracting and retaining staff in the face of growing competition:

- The retail sector is not perceived as an attractive career path by many younger workers.
- Small and micro retailers struggle to retain staff, upskill them and provide career paths.
- Promoting training on Human Resources management supports resilience.

- Increasing sales focusing on using e-commerce:
  - Offline retail is declining, and traditional stores are struggling while online shopping continues to grow.
  - Many small and micro retailers struggle to realise online growth opportunities.
  - Promoting training in e-commerce supports all three triple transition themes.
- Reducing energy bills, emissions and waste:
  - Energy bills are a significant cost for micro and small retailers and have risen.
  - Packaging waste is a significant issue with increasing regulation.
  - Providing training on reducing bills, emissions and waste supports the three triple transition themes.
  - Small and medium retailers need support in understanding the green-related EU regulations.
- Improving access to capital and risk management:
  - Small and micro retailers struggle to access capital for growth.
  - Many retailers lack to adapt to rapid changes and economic transformation.
  - Providing training on planning ahead and accessing capital flexibly and cheaply supports all three triple transition themes.
  - Technical and soft skills are equally important for the development of retail workforce.
- Most training responding to retailers needs already exist, but:
  - Many retailers struggle to find the training courses and integrated content, and
  - It is not easily and widely accessible at low cost for retailers of all sizes, all categories, all value chain segments, and in 33 Erasmus+ countries within the project period of S4R.

Which parts of the value chain in retail shall be focused on?

In the retail industry, the value chain consists of several key parts requiring various sets of skills in backend and frontend.

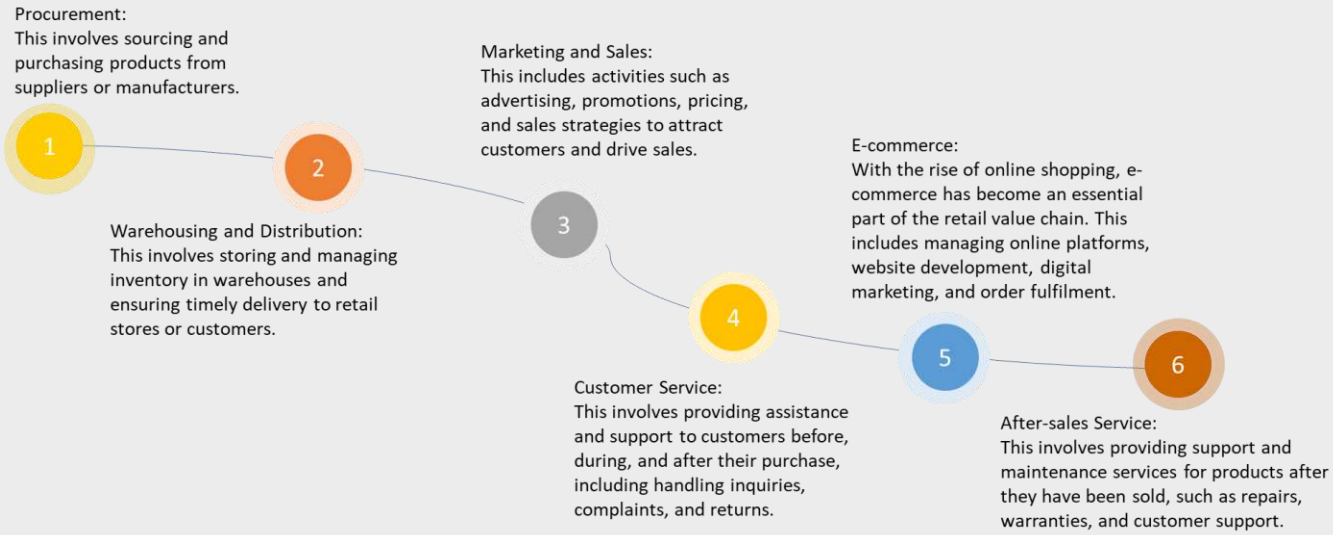


Figure 7 "Example of value chain in retail" (source: WKO analysis)

Each of these parts plays a crucial role in the overall value chain of the retail industry, contributing to the success and profitability of retail businesses; however, the majority of retail jobs in the EU are in frontline or store operations. It is important to take this into account as this - for instance - has an impact on the design of curricula for training courses.

The findings of the needs analysis necessitated the comprehensive consideration of all components within the value chain, in order to effectively encompass the diverse range of profiles and skill requirements within the retail sector.

What shall be the target audience of the training programme?

The retail industry is characterised by various sub-sectors, encompassing both frontend and backend business functions. This dynamic nature necessitates a diverse range of employees, each equipped with the requisite competencies to fulfil the demands and requirements. The strategy deliberates and addresses the question of what profiles and personas should be duly considered.

This had to be examined with meticulous attention, recognising its utmost significance in the advancement of training programmes, and of the prevailing, expanding, unfilled, and emerging profiles.

The personas are grouped into five archetypes, and learning pathways were mapped onto them (see more details in the chapter 'Personas and Learning Pathways').

What are the key training needs in retail across Europe?

The triple transition themes have undergone a dynamic evolution, giving rise to new competencies and skills needed to be covered by the workforce in recent years. A comprehensive assessment of the skill gaps pertinent to the retail industry was taken into consideration, in order to address the present and future demands in the realms of digitalisation, resilience and sustainability.

Nowadays, it is crucial to acknowledge the presence of overlapping needs among the various profiles within the retail industry. In today's retail sector, skill requirements have become more comprehensive, encompassing triple transition topics. For instance, in the past, the skills expected of shop assistants remained relatively unchanged for an extended period, such as product knowledge, sales techniques, cash handling, and problem-solving for customer complaints. However, in contemporary times, shop assistants are confronted with more intricate aspects, including environmental considerations related to products, digitised payment processes and ecommerce. This necessitates a more holistic understanding of several topics, such as all company headquarters functions, the background and origin of products, or current customer preferences.

The project's analysis grouped the skills needs into five themes that should be considered when developing training programmes specifically for the retail sector. These skills needs are summarised as follows:

Themes	Skills needs
´Learn how to learn´	• Willingness to learn • Talent planning and development • Curiosity

	• Mentoring and coaching
´Core retail skills´	• Coordination and time management • Attention to detail • Meeting commitments and deadlines • Assuming responsibility • Following instructions and procedures • Assisting and supporting co-workers • Customer relationship management • Sales, comms & marketing • Customer service • Digital marketing • Project management • Time management and prioritisation • Persuasion and negotiation
´Digital´	• Digital literacy • Collaboration and productivity software • Artificial intelligence and big data • Spatial thinking • Data mining • Cybersecurity and application security • Computer hardware and networking
´Sustainability´	• Environmental awareness • Sustainable and efficient resource usage • Social-cultural awareness • Social justice • Technology ethics
´Resilience´	• Persistence • Adaptation to change

Moreover, the analysis indicated a shortage of qualified workers in retail who can face these future challenges professionally. The few qualified workers available in the retail sector, might choose to work in another sector in the future due to diverse reasons.

Selected initiatives addressing skills shortages in retail

Selected initiatives at European and national/regional levels were assessed that address skills shortages as identified by S4R and support retailers to increase the usage of digital technologies and to implement sustainable supply chain practices in different countries. They provide information on identified challenges and opportunities in the retail ecosystem and propose actions to support its digital, green and skills transformation. Moreover, there are initiatives in European countries where learners have access for engaging in lifelong learning systems/platforms.



Figure 8 "Selected policies, initiatives, good-practices in retail (source: WKO & JAE)"

1

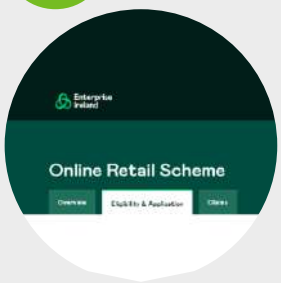


European Commission Directorate-General for internal market, industry, entrepreneurship and SMEs 2024

Aim

The pathway is a plan co-created by the Commission with EU countries, business stakeholders, social partners, and NGOs. It identifies challenges and opportunities for the retail ecosystem and proposes actions to support its digital, green and skills transformation and improve its resilience.

2



Enterprise Ireland, the Irish government's enterprise development agency, 2018

Aim

The Online Retail Scheme was created to support Irish retailers in developing a more competitive online offer, that will enable an increase in their customer base and build a more resilient business in the domestic and global marketplace both online and offline.

3



Federal Ministry of Labour and Economic Affairs in collaboration with the Austrian Chamber of Commerce, started 2017, ongoing

Aim

The KMU.DIGITAL funding programme supports Austrian SMEs in exploiting the great potential of the opportunities that digitalisation opens up. By raising awareness and providing targeted support in strategic planning, KMU.DIGITAL helps to break down existing barriers and enables SMEs to approach the topic of digitalisation in a needs-oriented manner.

4

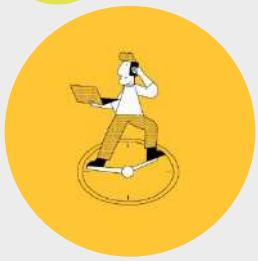


Enterprise Ireland, the Irish government's enterprise development agency, 2022-2026

Aim

The Green Transition Fund supports companies at every step of their decarbonisation journey - from initial planning and capability building to investment, research and innovation. It aims to support companies as they prepare for a low-carbon, and a more resource-efficient future.

5



The European Social Fund Agency, with the Association of Lithuanian Higher Education Institutions for centralised Admissions (LAMA BPO), the National Education Agency and the Qualifications and VET Development Centre as partners, ongoing

Aim

A lifelong learning support system (2021-24) is being created through the development of a digital platform that makes it easier for learners to find training programmes in one place, including the creation of an individual learning account system. The culture of lifelong learning in Lithuania will be changed by offering more flexible learning opportunities and supporting the acquisition of professional and social skills by the adult population. The platform will also offer training courses on general competences, including digital skills, language skills, and literacy.

6



German Federal Government, Federal Employment Agency, ongoing until 2030

Aim

The strategy aims to integrate and acknowledge informal learning, develop competencies, connect various educational agents, provide educational counselling, promote a new learning culture as well as a fair and equal access to education. These objectives are connected with different phases of life: childhood, adolescence, adulthood and older age. Lifelong learning is to be promoted as a self-evident feature of each individual's educational biography.

7



Swedish Government, ongoing

Aim

The recovery plan contains 26 reforms and investments, to boost the green recovery, education and transition into work, the expansion of broadband and digitalisation of public administration, as well as to provide better conditions to meet the demographic challenge and ensure the integrity of the financial system as well as investment for growth and housing.

8



Anpal (National Agency for Active Labour Policies), Italy, 2020, 2022

Aim

The National Programme for Youth, Women and Work aims at facilitating the entry of young people into employment, promotes the employment of women and people in in vulnerable situations, trains new skills in digital and ecological transitions for workers and modernizes employment services and active policies.

Appendix 4 provides further details on the initiatives considered.

Personas and learning pathways

How have we refined our list of personas?

The occupation profiles and training needs analysis (D2.1) proposed five prioritised personas and eight additional ones, which were based on the analysis of the most important occupation profiles in the European retail sector.

The prioritised personas we proposed were:

- Front-line employee
- Retail manager
- Supply chain worker
- L&D manager
- Retail newbie

The additional personas we proposed were:

- Omni-channel manager
- Sustainability manager
- Logistics & distribution manager
- Loss prevention manager
- Cyber-security specialist
- Customer experience expert
- (Visual) Merchandiser
- Buyer

In this skills strategy, we are considering a deeper analysis, which:

- Further evolves and refines the above list of personas,
- Considers how we might group personas together where they have similar training needs,
- Explores how the training needs we identified differ across every persona,
- Considers how training needs might be logically grouped together and sequenced.

Based on consultations with retailers, industry experts and learning & development experts - we expanded our list of personas from 13 to 15 in total, and then grouped some of them together into

5 categories, which we call 'archetypes'. For example, the shop assistant and store manager personas are grouped together into the 'frontline employees' archetype.

Please see below for an illustration of our expanded list of 15 personas, grouped into 5 archetypes. Collectively they are intended to cover many of the most important occupation profiles across the European retail sector and they enable us to group similar training needs in ways we hope retailers and learners will find valuable and intuitive.

Archetype	Persona(s)
Frontline employee	• Shop assistant - note: this will also cover the cashier and shelf filler profiles • Store manager - note: this will also cover the owner of a small retail store
Retail manager	• E-commerce manager • Sustainability manager • Supply chain manager • Logistics & distribution / fulfilment manager • Information security manager • Loss prevention manager (physical security manager) • Merchandiser • Buyer
Supply chain worker	• Warehouse worker • Distribution worker
L&D manager	• HR/L&D manager
Retail newbies	• Student • Career switcher

(Source: Accenture analysis)

How do training needs differ across archetypes?

For each persona and archetype, we mapped the common training needs.

This provides us with insights on what training is needed by frontline employees compared to supply chain workers or retail newbies who are considering applying for jobs in the sector. For all archetypes, we considered the need for training on each of the triple transition themes as well as core retail

skills and learning how to learn - in line with the five themes highlighted in our training needs analysis.

A short summary version of this analysis is included in the table below - but we recommend reviewing the MS Excel table in Appendix 1 for further details on how we consolidated 100+ training needs, mapped them to the 15 personas and 5 archetypes and grouped them into related topics.

Archetype	Short description	Common training needs
Front-line employee: • Shop assistant	• Primary contact between the store and its customers • Play a crucial role in customer experience and satisfaction • Include roles such as shop assistants, cashiers, stock clerks and store managers	• Communication and interpersonal skills to engage customers daily • Techniques on how effectively assist and advise customers in the store • Great sales techniques to upsell, cross-sell and efficiently close sales • Understanding of the store procedures and use of point-of-sale systems
Retail manager: • Store manager • E-commerce manager • Sustainability manager • Supply chain manager • Logistics & distribution / fulfilment manager • Information security manager • Loss prevention manager (physical security manager) • Merchandiser • Buyer	• Have substantial retail experience (> 6- 7 years) • Specialization varies from e-commerce to sustainability and information security	• General leadership skills to lead the projects, manage teams, make decisions and solve non-standard tasks • New approaches/ techniques to advance day-to-day operations of their field of specialisation • Regular review of retail trends and understanding of their impact on their operations • Clear understanding of value of training for themselves, their employees, and the business
Supply chain worker: • Warehouse worker • Distribution worker	• Warehouse or distribution workers who have been working in retail for around 3 years	• Cover basic core retail skills that are common across warehouse and distribution workers.

	• Desire to develop new skills and progress in their career	• Focus on adaptability and lifelong learning and creating awareness of both the risks and opportunities of trends like automation
L&D manager: • HR/ L&D manager	• Responsible for employees learning, development and learning programmes design • Understanding of skills and desire of training and education in case of coming from another sector	• Know how to take ownership of L&D planning more strategically including translating training hours into sales/financial metrics • Understanding approach on how to deliver life-long learning experiences considering innovation cross-industrial trends (e.g. leveraging GenAI) • Learning techniques to removing barriers to training for both employers and employees, including fostering a learning culture • Conduct effective TNAs within the context of the future workforce
Retail newbies: • Student • Career switcher	• No/low retail experience • Limited awareness of variety of retail jobs • Wide range of ages, experience and education levels • Desire or interest in developing or progressing a career in retail, including future job prospects	• Inspiration, myth-busting and awareness about careers in retail • Matching of their talents and passions to dream jobs • Clarity on career paths, earnings prospects, skills, experience and training needed for chosen jobs • Step-by-step guides on how to build the skills, adapt CV and LinkedIn and prep to interview to get jobs

Source: Accenture analysis

What are learning pathways?

By learning pathway, we mean related training needs that are grouped into topics and put into a logical sequence to deliver a defined learning outcome.

Please note:

- **Learning pathways can be flexibly used by more personas in practice** – for example, the pathway designed for frontline employees could be accessed by a student looking to get into a job too, or the owner of a small retail shop might want to do the L&D manager pathway as they manage all the training for their staff themselves and the retail manager pathway as they are effectively responsible for the supply chain, sustainability and many other specialist topics
- **The same individual could do several pathways over time** – for example a student might take the retail newbie pathway, get interested in retail as a career and then do the frontline employee pathway after getting their first job. They might then move into the retail manager pathway if they become more senior and / or move into a specialised role.
- **S4R training is intended to be complementary not comprehensive** – it does not replace retailers need to provide training about their own products, processes, culture and regulations. It is designed to enhance common core retail skills, 'learning how to learn' and triple transition skills specifically.
- **Some training needs are common to multiple pathways** – this could provide insights on where training modules may be used in multiple training courses.

What learning pathways might fit retail needs?

We illustrated 5 learning pathways (one for each of the 5 archetypes outlined above). For each of them, we defined learning outcomes and grouped training needs into topics, which we then put into a logical sequence to create the learning pathway.

We believe these pathways can collectively cover many of the needs articulated by retailers and other stakeholders through interviews and survey responses as part our training needs analysis.

This provides us with initial insights on how training might be structured to meet the identified needs. It enables us to consider where the same need recurs across multiple personas and pathways where there may be scope to have single modules in multiple courses. It will also support WP3 in exploring questions such as what training content is already existing and what needs to be created, what parts might be online or offline, how long training courses and modules might be etc.

We recommend reviewing the personas, archetypes and learning pathways in Appendix 2.

How will this analysis feed into curriculum design?

It is critical to note that this analysis is not prescriptive for the curriculum design, which will be done later by WP3 and it is merely one input into that process. WP3 will also consider lessons from best practice, content from existing training courses, input and feedback from retailers, VET/HE institutes, learners and other stakeholders. The personas, archetypes and groupings of needs into learning pathways is all intended as stimulus for design rather than constraints. The actual number of training courses will not necessarily be the same as the number of learning pathways, their names will differ and the module names and contents that are created will not map directly to the groups of training needs we have defined. It is intended only as a source of insights and considerations for design.

What this analysis did involve:

- **Consolidating all identified training needs** from our analysis in D2.1 with additional items identified by cross-checking against the training content of reactive courses. This enabled us to create one integrated master list with 100+ distinct training needs. This is an important step to ensure reactive and emerging courses will not be managed in isolation. It will support future thinking on where content in reactive courses can become part of the emerging courses.
- **Refining our proposed prioritised personas** to an expanded list of 15 but grouping them into 5 archetypes. This enables us to get better coverage of more of the most important occupation profiles in retail, while also bringing them together in a logical way where training needs are similar.
- **Understanding how training needs differ for each persona** by mapping all 100+ training needs to 15 personas and 5 archetypes (see analysis in Excel table in Appendix 1 for details)

- **Grouping training needs** together into related topics.
- **Sequencing** related training needs to create 'learning pathways' that are more sector relevant, thereby serving as a useful input to curriculum design.

The next steps will be:

- Starting the curriculum design process
- Defining
    - the number of training courses or their names
    - the training modules within each course
    - what modules will be online or offline
    - the optimal duration of courses and modules
- Mapping what content is existing (and what can potentially be accessed and integrated) vs. what content needs to be created (because it is new or needs to be heavily customised)
- Engaged potential learners (current and prospective retail employees) directly to understand how well the learning pathways resonate and how we might improve them.

The collaboration of key partners from WP3 in WP2 was critical to this analysis and will support the application of insights from it in the following activities.

Appendices (separate documents)

Appendices in the format of separate files provide more detailed information of the analysis:

#	Source	File(s) name
1.	Training Needs Mapping	1_S4R_ Retail Skilling Strategy_ Mapping of Training Needs and topics to personas
2.	Personas and Pathways	2_S4R_Retail Skilling Strategy_ Personas and learning pathway working session
3.	Integrated Implementation Plan	3_S4R_ Retail Skilling Strategy_Integrated Implementation Plan
4.	Policies and initiatives	4_S4R_Case studies on policies and initiatives

Rate	1	2	3	4	5
Quality Parameter	very low/strongly disagree	low/disagree	moderate/neither nor	high/ agree	very high/strongly agree
1. The work performed corresponds to the requirements and methodological standards of the project.	☐	☐	☐	☐	☒
2. The drafting and structuring of each deliverable include the contribution of all relevant experts.	☐	☐	☐	☐	☒
3. Deliverables use clear and easily understandable language in the text and the design is professional and in line with the project brand identity, guidelines, and document template.	☐	☐	☐	☐	☒
4. The output is in line with the standards adopted by the European Commission.	☐	☐	☐	☐	☒
Name of the WP Leader	Liebelt Jens | WOE				
Submission Date	09/08/2024				



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