



ToRRe

Building Towards Retail Resilience

PR1 Desk and field research

Synthesis report

Bulgaria, Malta, The Netherlands, Spain

P2. ULSIT



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Introduction

In this synthesis report the partnership of project ToRRe provides accumulated analysis of the results achieved in the first part of the project development, i.e. – the produced elaborated national reports in the four partner countries: Bulgaria, Malta, Spain, The Netherlands. It gives an overview about the current status of the retail sector in the countries, responses from the common survey and interviews that were concluded and best practices defined nationally and internationally.

First, the partners prepared a common survey with questions to set the basis for the development of the PR1. Methodology, in-depth assessment and building the e learning tool.

156 survey responses were collected across the countries. They were elaborated, followed by the outcomes of the interviews – two per partner organisation – 12 in total experts with experience in retail were interviewed. The survey results were verified and validated again by conducting interviews with experts – 2 per partner organisation. They were done both face-to-face and online.

The profile of the interviewees was selected carefully in order to provide diversity and collect different points of view. It was an important part of the primary research phase.

These interviews are elaborated following the questions which were selected carefully in a joint discussion during the first ToRRe meeting in March 2022. Both activities focused on the involvement of retail owners and managers, employees and experts in the sector.

Finally, overall recommendations will be provided to develop the further results. Also, best practices are included to have as an example while compiling ToRRe learning materials.

This document follows the common structure of the generated national reports by the four countries:

- BULGARIA
- MALTA
- THE NETHERLANDS
- SPAIN

The main sections in each report are:

- Survey results
- Interviews with experts
- Recommendations
- Best practices: two main groups of examples were reviewed, analyzed and synthesized:
 - o **What free (online) training courses are available on national level, which we can use as best practice?**
 - o **What free (online) training courses are available on international level, which we can use as best practice?**

First, the survey responses are analysed, followed by the outcomes of the interviews, and finally the most important recommendations can be found in this document.

After all partner countries have created the national reports, it was analysed by P2. University of Library studies and Information Technologies and concluded in the following overall synthesis report.

MAIN CONCLUSIONS AND RECOMMENDATIONS

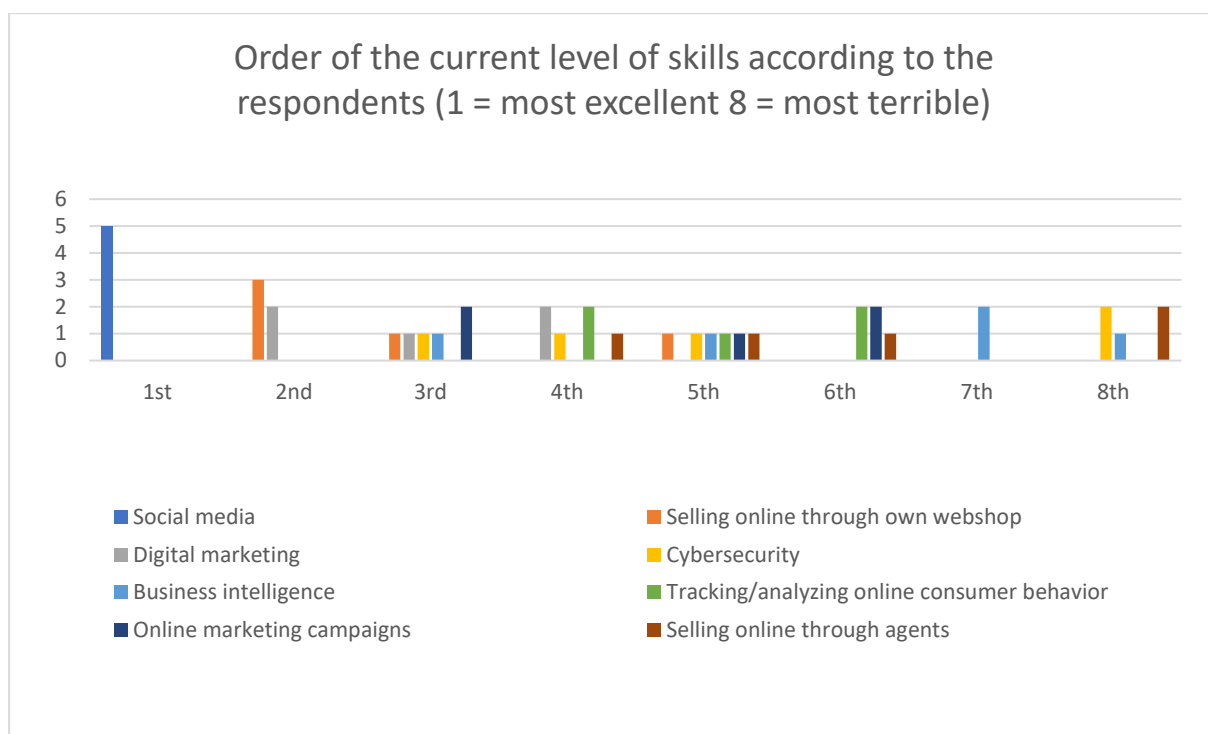
Based on the main findings, the following knowledge subjects are defined to be further elaborated with specific learning objectives, outcomes, description, tools and content for the Syllabus which then will lead to the curation and development of training materials and tools to be uploaded on the online platform of PR2. Development and piloting of the platform. Based on the results, also the lead partner for the development of the topic was identified:

	CCI VRATSA	SULSIT	EOLAS	BDF	MBB	EURODIM
Social media & digital marketing > Marketing campaigns		3	3	2	1	
Selling online > Both through own webshop and through retailers	1	2				
Business intelligence	1				2	
Customer behaviour Tracking analysing	3	1		3		
LEADERSHIP (only for employers) (introduction and overview)						
Cyber security > Legal > Related to the digital shop > financial; Recruiting employees		2				1
Collaboration with other companies and innovation (circularity)			1	1		
inventory management > How to handle returns etc. (online sales)				1	2	2
Soft Skills incl. leadership > customer services & complaint handling	2	1	2		3	

In the table above partners are defined as: 1 – leader of the topic; 2 – supporting the development as 2nd and respectively 3rd partner.

Based on the survey results we concluded that the following top 3 skills are currently available and important:

1. SOCIAL MEDIA
2. SELLING ONLINE THROUGH OWN WEBSHOP/E-COMMERCE PLATFORM
3. DIGITAL MARKETING



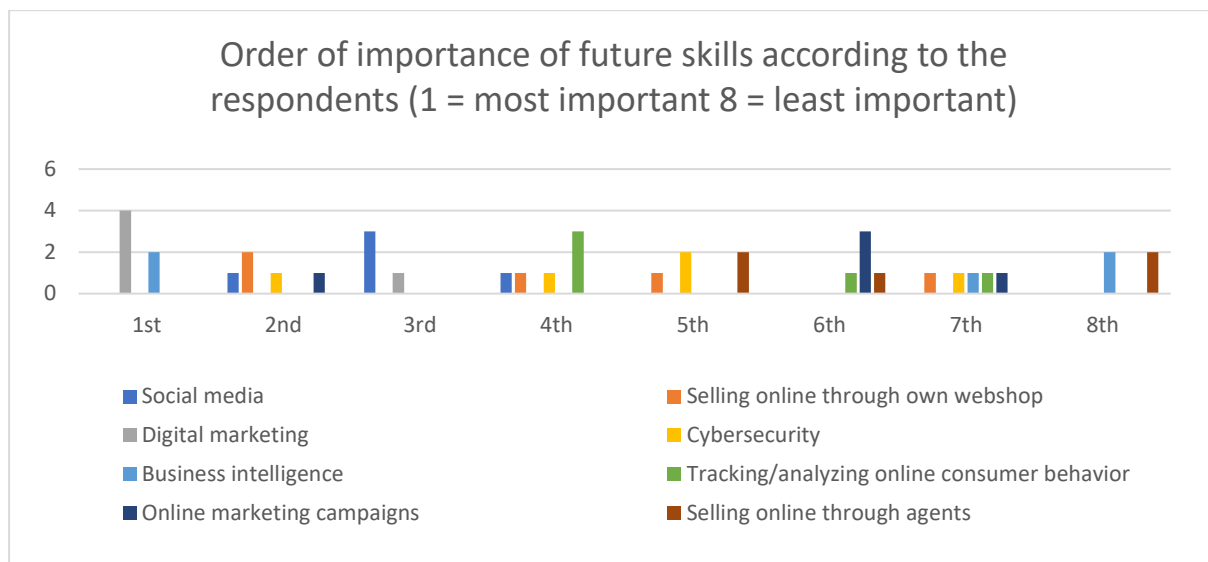
The ranking is provided below:

Ranking	1st	2nd	3rd	4th	5th	6th	7th	8th
Social media	5	0	0	0	0			
Selling online through own webshop		3	1		1			
Digital marketing		2	1	2				
Cybersecurity			1	1	1			2
Business intelligence			1		1		2	1
Tracking/analyzing online consumer behavior				2	1	2		
Online marketing campaigns			2		1	2		
Selling online through agents				1	1	1		2

In terms of the future skills which will shape the retail industry in the partner countries the results show that the top 3 skills are:

1. DIGITAL MARKETING
2. SELLING ONLINE THROUGH OWN WEBSHOP
3. SOCIAL MEDIA

The accumulated ranking is presented below:



There is a contradicting result regarding the Business Intelligence as emerging new skill. It is ranked at 1st and 8th places. This is related to its relatively new and unknown state of development. As a term it is still new to the partner countries and the increasing popularity is still at low levels.

In terms of the consequences of the Covid-19 which affected the industry the most here are the accumulated analysis:

Due to COVID many shops had to close. This has led to depreciation of skills/experience. But some shops were open. COVID brought a good common topic to talk about and to express humanity and demonstrate client focus. It provided a connection between retailer and customer.

Regarding the few lockdowns, we had experiences with the big retail centres, and also the fear in the people's minds of getting infected with the virus, COVID-19 was the turning point that gives an advantage to the Ecommerce over the offline trade. Many businesses had to adapt very fast to be able to survive based on the different Macro environments. This showed that little percentage of the business was well prepared for the full eCommerce trade. Most of the businesses had to improve their hardware and digital assets to be able to continue their business. Many businesses had to learn in action how to structure their own digital marketing funnel to serve their needs.

Covid-19 has affected the retail industry in a number of ways, the most prominent being the need to urgently upgrade technology and specifically focus on elements that were previously done by people. Covid-19 pushed us to become more tech-savvy to meet consumer demands. Clients are now doing their research online and come to a decision on what they required by themselves. They only need to come to the retail outlet to conclude the sale. Technology has also aided in keeping stock of what is available in the store and which products are selling. This does not mean that we do not enjoy meeting people and giving them the tactile and more visual and personal experience that an online purchase cannot provide.

COVID-19 was a veritable earthquake in the retail sector. The consequences varied depending on the type of sub-segment. While grocery and pharmacy retailers flourished due to the shift of consumption from large stores to small, local stores, fashion or electronics retailers were hit hard, giving a boost to e-commerce. Nevertheless, e-commerce and digital media have become generally accepted, making them imperative in both food and other retail.

Current status of the retail sector in BULGARIA

The statistic shows that in the year 2021 the leading retail sector in Bulgaria is fashion and clothing, with 27 chains, followed by footwear and leather, with 15 retail chains. Personal care ranked in the third place, with 14 chains. Most of the retail entrepreneurs who have stores complain of the lack of enough digital skills of employees. Digitalisation is increasing fast in the past few years thanks to the presence of various technical companies and the quality and speed of internet. Bulgarian e-commerce sales reached €690 million in 2018. Collaboration is one of the weakest points of e-commerce in Bulgaria. The market is very segmented. Revenue in the eCommerce market is projected to reach US\$2007.00m in 2022. The eCommerce market comprises the sale of physical goods via a digital channel. There are emerging new entities which offer innovative services and solutions in the sector. Entrepreneurs are digitally literate. Some major international webshops are present in Bulgaria which supports them.

The most popular social media platform is Facebook. Advertising via this site can reach even 3.5 million users. When it comes to Instagram, retailers can get to 1.2 million people. Twitter has the smallest reach – 160 thousand. Interestingly, the vast majority of Twitter users are men.

SURVEY RESULTS

How many responses did you collect?

No	How many responses did you collect?	Pieces
1.	ULSIT	32
2.	CCI Vratsa	35

Country

Bulgaria

Years of experience

(Please provide the highest, lowest and average number of years)

No	Years of experience	ULSIT	CCI Vratsa
1.	<i>Between 1–3 years</i>	13	16
2.	<i>Less than 1 year</i>	11	8
3.	<i>Between 3-5 years</i>	5	5
4.	<i>Over 5 years</i>	3	6

Business owner or employee?

(Please provide the percentage of the ones who are employee and business owner)

No	Business owner or employee	ULSIT	CCI Vratsa
1.	<i>Employees</i>	50%	40%
2.	<i>Business owner</i>	50%	60%

The knowledge gap in the retail sector

(Please provide a small paragraph about the awareness of a gap in general and which knowledge gap the respondents think there is)

A small percentage - less than 10% - of the respondents are aware of the lack of skills:

Most of them think that the main missing skills are mainly soft skills such as: communication, innovation, digital skills, sales. Some of them think that often ignorance is also an issue.

Order the level of skills provided by the respondents (1 = most excellent 8 = most terrible)

No	ULSIT	No	CCI Vratsa
1.	Social media	1.	Social media
2.	Selling online through own webshop	2.	Digital marketing
3.	Digital marketing	3.	Selling online through own webshop
4.	Cybersecurity	4.	Tracking/analyzing online consumer behaviour
5.	Business intelligence	5.	Cybersecurity
6.	Tracking/analyzing online consumer behavior	6.	Online marketing campaigns
7.	Online marketing campaigns	7.	Business intelligence
8.	Selling online through agents	8.	Selling online through agents

Which retail skills are considered important for the future? (1 = most important, 8 = less important)

No	ULSIT	No	CCI Vratsa
1.	Business intelligence	1.	Digital marketing/communication
2.	Cybersecurity	2.	Selling online through own webshop
3.	Digital marketing/communication	3.	Social media
4.	Social media	4.	Cybersecurity
5.	Selling online through own webshop	5.	Selling online through agents
6.	Online marketing campaigns	6.	Tracking/analysing online consumer behaviour
7.	Tracking/analysing online consumer behaviour	7.	Online marketing campaigns
8.	Selling online through agents	8.	Business intelligence

Are there any skills missing in the list provided in the survey?

- *Customer support*
- *Financial management*
- *Communication/ Communication skills*
- *Innovation because it is important for the sales!*
- *Soft skills, communication, feedback*
- *Digital illiteracy*
- *Being confident and making people buy/use my service/product*
- *Legal and regulations*
- *Product photography*
- *Content writing*
- *Sales*

How would you like to learn about these skills? (1= most preferable, 7 = not preferred)

No	ULSIT	No	CCI Vratsa
1.	<i>Videos (YouTube)</i>	1.	<i>Videos (YouTube)</i>
2.	Podcasts	2.	Stories
3.	Stories	3.	Text
4.	Pratice	4.	Podcasts
5.	Case studies	5.	Case studies
6.	Text	6.	<i>Books</i>
7.	<i>Books</i>	7.	-

How much time are respondents willing to invest in improving their skills?

On average 4 hours/day; as much as it takes; one week; one month.

INTERVIEWS

Name	Ivan Petrov
Nationality	Bulgarian
Function (job description)	Digital marketing expert
How much experience in the field of retail (in years)	6 years

1. How did COVID-19 change the retail industry and how did this affect the current level of skills?

Regarding the few lockdowns, we had experiences with the big retail centres, and also the fear in the people's minds of getting infected with the virus, COVID-19 was the turning point that gives an advantage to the Ecommerce over the offline trade.

Many businesses had to adapt very fast to be able to survive based on the different Macro environments. This showed that little percentage of the business was well prepared for the full eCommerce trade. Most of the businesses had to improve their hardware and digital assets to be able to continue their business. Many businesses had to learn in action how to structure their own digital marketing funnel to serve their needs.

2. Which skills do you think are most important in the 'present' retail sector?

As life gets easier for the consumers, it gets more sophisticated and complex for the business to meet their needs. Food, coats, shoes, electronics, everything you need can be delivered to your door from any point in the World. The ratio between price, quality, and delivery time also matters. That's why I think that this competition for the customer will be much easier for the capital business and world giants such as Amazon. In order to survive businesses, have to integrate all the digital tools required into their marketing mix. Depending on the marketing strategy business have to either give the best ratio between price, quality, level of good service and delivery time or do something unique that no other business does. Whatever they do they have to make full omnichannel integration of their retail, eCom, Phone sales, chat sales, etc. The biggest advantage is going to be the business management software that will give the chance to do this integration in real-time. Getting to know customers better and serve his/her specific needs will also happen only if this business management software is integrated with the big data providers such as big social networks. This will let the business communicate better what they have to offer at each step of the marketing funnel.

3. What are the current skill gaps in the retail industry and which one do you consider most important to focus on?

If we take a look at the marketing mix there are many complex factors to be considered. I mentioned earlier the best ratio between price, quality, level of good service, and delivery time or providing unique products for a niche market. One of the biggest issues for mid and especially small-size businesses is still brand awareness in online and offline communicational channels. Still many small and some mid-size business owners do not realize that if they want to lead the market, they have to spend more on hiring talented people to produce high-quality digital advertising assets and to spend money to present those assets digitally to promote their products and business online (and also offline). The biggest turning point in not so long term will be the date integration of the entire business process and AI.

4. What would be the future trends to anticipate on? And how can we anticipate for them?

In the future consumers will get lazier and more demanding. Whoever can serve their needs better, faster, easier, and, cheaper will lead the market. So, to serve better businesses have to invest in AI to get to now easier the customer. To read their mind. And the other two factors "cheaper" and "faster" means that: the business has to be able to negotiate the best product price at the wholesale market which means that the biggest retailers will get the best wholesale price; to serve faster will mean for the eCom business many strategic warehouses and excellent delivery. Why not see innovations in the delivery sector too, especially for small villages where many modern people are getting out of the noise of the big city.

5. When teaching any retail-related topic, which approach is most effective? Which

I believe that you have to always start with the customer. How you as a business owner will serve your customer better, faster, and cheaper. How you will be able to keep enough profit to thrive and reinvest and improve. I think that the easy way to teach retail-related topics is by discussing cases of existing business problems and solutions. The problem creates a need of finding solutions. I try to put the student in the shoes of a business owner and decision-maker.

method/activity do you like most?

Name	Deyan Doykov
Nationality	Bulgarian
Function (job description)	Management consultant
How much experience in the field of retail (in years)	15 years

1. How did COVID-19 change the retail industry and how did this affect the current level of skills?

Mostly it was affected by the urgent need to transform digitally and start selling online. Many stores especially the “Mom & pop” type were closed due to the high renting rates. The levels before Covid-19 are hard to be attained again as the customers changed their behaviour as well and now they prefer mostly shopping online including delivery. It is also very common to have transnational sales and make order from other countries where the prices are cheaper and quality is higher. Another point of need is the sense of adaptation and the attitude of employees and managers towards change. It is related to innovation that lacks in the sector and the sustainability. Many new regulations come into place to enhance the sustainability in the sector.

2. Which skills do you think are most important in the ‘present’ retail sector?

Mostly: technological/digital skills. It is very important to train them in modern approaches and methodologies such as Design thinking, sustainability, new technologies like Artificial intelligence, new inline sales channels, etc. Very often the managers lack strategic management, too. They should be prepared to think and act for innovation and develop entrepreneurial mindset. Logistics and storage management is another aspect – especially for e-commerce when very often returns happen and it takes time and money to manage and coordinate the process. Many big stores closed their stores already and/or concentrated in the shopping malls only. People changed their habits – spending more time at home, dedicating time for hobbies, having pets, renovating, re-decorating homes, new clothing styles, etc. The skills to observe and understand these habits, needs and behaviour is a key success factor. Digital technologies like chatbots, AI in different forms and online services will become more important together with finding the so-called asset-light business models. Several reports suggest that tracking orders, managing customer loyalty programs, and communicating with customers are the top three areas where retailers will help fill staffing gaps. Retailers should consider investing in automated software or upgrading what they currently use to meet the changing needs of the hiring landscape.

3. **What would be the future trends to anticipate on? And how can we anticipate for them?**
4. **When teaching any retail-related topic, which approach is most effective? Which method/activity do you like most?**

As many reports suggest in the coming years Automation technology and social media trends will continue to play a part in how the retail industry evolves. More retailers will offer personal shopping services, and social media influencers will remain relevant. There is a new trend of social commerce. Social commerce is one of the biggest digital trends in the retail industry and interactive retail experiences are bridging the gap. Omnichannel The retail industry is rethinking the shopping experience in 2022, redefining not only how we shop and sell, but the incredible advantages independent retailers have right now - shoppable post in Instagram, marketing email sending customers to an online store – the so called online-to-offline is a trend to stay longer. Customization plays big part in this process, too.

It is mostly learning by doing – game-based approach, flipped classroom, project-based learning and other approaches. In some cases, examples, templates and case studies also help. In all cases the learning objectives and the time should be very well defined in the very beginning. Automated processes are becoming a must so technology-enabled training should be provided, too. Some interactive and innovative methods will help but most of all – simplicity and short in time modules will help. The emphasis is on theory, practice, gaining experience in real life situations, and for several years online courses. In this way, in addition to theoretical knowledge and practical skills, the acquisition of key professional competencies is achieved.

Name	Magdalena Gergova
Nationality	Bulgarian
Function (job description)	Expert - Teacher
How much experience in the field of retail (in years)	26

1. **Could you provide us with some information on the level of VET skills in the retail sector in your country?**
2. **How did COVID-19 change the retail industry and how did this affect the current level of skills?**
3. **Which skills do you think are most important in the ‘present’ retail sector?**
4. **What are the current skill gaps in the retail industry and which one do you consider most important to focus on?**

Knowledge about the trends is also very important and among them – all topics and skills related to circular economy and sustainability. It is a matter of technology literacy, too. Most of the people who work in the industry have lower levels of education and need further training which is done at the workplace, intensively and provides hands-on experience. There is also lack of talent and

- Insufficient knowledge and skills to work in a digital environment;
 - Sharpened social skills

serious turnover which can be overcome by higher social benefits. The new generations require new approaches to retain them and very often it is not just the salary but more about the work-life balance, social benefits, career prospective, etc.

Hygienic and preventive measures have been strengthened:

First, it is the digital skills and change management. It is directly related to the skills like Empathy and knowing customers’ needs and behaviour. People are becoming more cautious and prefer buying online, choosing the best ratio – price-quality and time for delivery. It is a matter of customization and individual approach, too. A big part of the successful strategy is also loyalty strategies and methods to retain the customers and win new ones. There are various new business models that should be applied but very often the owners and managers are not aware of the new models especially the ones for digital and online businesses.

- Intercultural peculiarities.

5. What would be the future trends to anticipate on? And how can we anticipate for them?

- Elimination of cash payments;
- Increasing e-commerce, which can replace traditional;
- Improving the skills for working with digital products related to the sector - retail

6. When teaching any retail-related topic, which approach is most effective? Which method/activity do you like most?

The combination of theoretical knowledge with practical skills by solving cases, problem situations and examples.

Name	Stela Rusinchovska
Nationality	Bulgarian
Function (job description)	Expert – “Trainer”
How much experience in the field of retail (in years)	40

1. Could you provide us with some information on the level of VET skills in the retail sector in your country?

There are two categories of staff in the sector:

- Retailers who are middle-aged and have a lower level of commercial skills
- Retailers up to the age of 30 who have completed secondary vocational education and have a higher level of commercial skills.

Both groups of traders need to increase and improve their skills in the use and application of modern technologies in commercial communication.

There are relatively few organizations that already implement trainings, but there is a tendency to offer a better service than them.

2. How did COVID-19 change the retail industry and how did this affect the current level of skills?

- 3. Which skills do you think are most important in the 'present' retail sector?**
- 4. What are the current skill gaps in the retail industry and which one do you consider most important to focus on?**

For offline retailers COVID-19 led to:

- Small number of clients
- Opportunity for online shopping for consumers and unpreparedness of some businesses
- Lower incomes and less consumption of some types of goods

The listed factors have had a detrimental effect on retailers who are oriented mostly or

Increased use of digital products and the use of skills related to them.

- Skills related to the digital environment
- Information (origin of the goods)
- Proficiency in a foreign language
- Financial literacy

- Patience
- Ability to work in a team

- 5. What would be the future trends to anticipate on? And how can we anticipate for them?**
- 6. When teaching any retail-related topic, which approach is most effective? Which method/activity do you like most?**

In addition to theoretical education, to use the methods of individual approach to the training group; use of practical cases, role-playing games, etc.

As a teacher, I like the use of the SWOT analysis method the most. It is useful for making the necessary decisions in the course of business.

RECOMMENDATIONS

The main conclusions from the survey are:

- The skills to be included in the training are related to retaining and attracting customers, digital technologies, social media channels.
- Soft skills, digital literacy, financial management and communication are considered important skills that are still missing.
- New trends that affect the industry: social commerce (as opposed to the traditional e-commerce), use of new tools and approaches such as Design thinking, chatbots

- Omnichannel strategy should be considered by retailers and strategic thinking should be developed of business owners and managers.
- Retailers are using, or planning to use, automation to decrease their team's time on hands-on work.
- The best ratio between price, quality, level of good service, and delivery time or providing unique products for a niche market.
- One of the biggest issues for mid and especially small-size businesses is still brand awareness in online and offline communicational channels.
- Interactive training methods are preferred by the respondents – podcasts, videos (YouTube), case studies, examples, storytelling, etc.
- Social media, cybersecurity and business intelligence are considered most important for the future success of retailer employees.
- The least developed skills are: Selling online through agents, online marketing campaigns, Tracking/analysing online consumer behaviour. The last is directly related to the skills for empathy and design thinking. It is related also to the interactive customer experience
- Fast (same-day) delivery, digital technologies and tools are key success factors for retailers.
- Most of the participants shared their opinions that platforms transform the transaction logic of retailing as they simply intermediate transactions between buyers and suppliers rather than handling the entire supply and logistics chain themselves.
- Social and sustainability aspects are becoming more important of the activities of the retailers.
- In the future consumers will get “lazier” and more demanding. Whoever can serve their needs better, faster, easier, and, cheaper will lead the market. So, to serve better businesses have to invest in AI to get to now easier the customer.
- Need to be improved Learning approach: In addition to theoretical education, use the methods of individual approach to the training group; use of practical cases, role-playing games, etc. The combination of theoretical knowledge with practical skills by solving cases, problem situations and examples.

Most of the participants shared their opinions as customers, too and expressed their needs, preferences, behaviour and attitude to retailers. They pointed out the need for upskilling the staff who work in stores and online for better services and customization is one important aspect of their work. Personnel turnover is a challenge and the need to retail staff is key success factor for the business owners in retail.

BEST PRACTICES

(Please provide the main recommendations concluded from the survey and interviews - 1 page max.)

What free (online) training courses are available on national level, which we can use as best practice?

Name	Type of training	Description	Which innovative tools used? (if any)	Rewarding system (e.g. certificate)	Link
Digital garage	Free Online	A wide range of educational content without monetary payment. You can study by choosing individual modules, or dive right in and sign up for a full course.		Certificate	https://learndigital.withgoogle.com/digitalengarazh/courses

Current state of the retail sector in MALTA

Introduction

The wholesale and retail sectors are major employers in the Maltese economy. The activity in these sectors has significant indirect effects on the rest of the economy. Yet the share in total value added is declining due to the stronger growth in other service-related industries

In 2017, the National Statistics Office (NSO) declared that there are almost 7,500 registered legal entities within the wholesale trade sector and over 9,000 entities within the retail trade sector in 2017. These made up 16% of the total business units registered in Malta that year.

Most of the firms in both areas are considered micro enterprises, as they employ less than 10 employees. This sector is mostly made up of small local retail shops and street vendors (fruits and vegetables). Most of these are family owned. However, entry into the EU and the adoption of the Euro have changed the face of traditional local retailing and have paved the way for large European retailers and franchises to expand on the islands. While the retail industry in Malta is still by and large dominated by small trading companies, Malta's entry into the EU has forced local traders to re-think their distribution strategies by opening the local market up to foreign competition. Hence the opening and closure of international brand stores have also impacted the Maltese Retail Market

Recovery from COVID is positive- In March 2022, the volume of retail trade – which is a short-term indicator of final domestic demand – increased by 16.4% in year-on-year terms, after rising by 7.3% in February. This is compared to the 2021 figures

Shopping online in Malta – MCA study

A recent Malta Communications Authority study elaborated that although online buying by the Maltese population is predominantly from sites abroad, there is clear predisposition towards buying from local websites. Over these last years, a number of local eCommerce sites have sprouted on the internet, intently enticing the Maltese population into buying online. This increase in e-shops could be attributed to various factors, such as:

- the eCommerce Grant scheme rolled out in the recent years wherein financial assistance was granted to businesses in establishing an eCommerce website
- the COVID-19 pandemic, which forced both retailers and people into compulsory online transactions to stay safe during these times.

Remarkably, a sizeable 53% of digital buyers now also buy from online suppliers based in Malta, a notable improvement from previous surveys. During 2021, one out of every three digital buyers purchased their daily needs over the internet

There has been an impressive growth for online grocery shopping and this clearly explains the increase in the above figure. The need for online grocery shopping was clearly accentuated throughout COVID. It will be interesting to see whether (and to what extent) this behaviour will stick post COVID. Meanwhile, 13% of digital buyers prefer local eCommerce sites whilst another 59% make no distinction between local and foreign sites. Slightly less than a third, prefer to purchase from foreign online shops.

It must be outlined that since Malta is an island, postal charges for purchases from overseas are quite hefty. Furthermore the main browsing language is English and whereas many may have purchased frequently from the UK in the past, the impact of Brexit has /will surely impact online purchases from

the UK since all purchases from non-EU increase costs with additional VAT and declaration paperwork .

As the pandemic led to restrictions being imposed, consumers, irrespective whether these are avid eCommerce users or prefer buying in-store, had to somewhat modify, their shopping habits – 27% of digital users reported to have increased their online shopping during COVID-19 and a mere 1 % claimed to have purchased online for the first time. Another 57% reported no changes in their digital shopping whilst 15% claimed to have decreased their online shopping. Looking ahead, 15% of digital users foresee an increase in their online purchasing whilst 76% don't envisage any changes in their online shopping behaviour. Only 9% and 1% respectively intend to decrease their eCommerce activity or stop completely.

SURVEY RESULTS

How many responses did you collect?

19 responses

Country

Malta (100%)

Years of experience

Less than 1 year	21.1%
Between 1 – 3 years	42.1%
Between 3 – 5 years	10.5%
Over 5 years	26.3%

Lowest number respondents had between 3-5 years of experience and most of the respondents have between 1-3 years of experience in the retail industry.

Business owner or employee?

Employee	78.9%
Business owner	21.1%

The knowledge gap in the retail sector

Most of the respondents (63.2%) are not aware of a lack of knowledge in the retail sector. This could be attributed to the fact that the majority of these are employees, who might not have the knowledge of the actual level of skills required in today's retail and industry and lack the ambition to gain such knowledge as they do not continue their career in the retail sector.

A total of 36.8% of the respondents indicated that they are aware of a lack of knowledge and the skills gap in the retail sector, but not specifically on the digital skills gap:

- A lot of people might get into the retail sector without actually knowing what it entails and without having the required skills.
- I believe a better understanding of professionalism is necessary.
- New employees are generally given brief to no training when employed which creates a problem in the given sector/job as this leads to lack of knowledge on their behalf.

- This industry is one of the busiest industries, so you need a good set of organisational skills which some people lack and a good background knowledge to maintain a stable environment for customers' needs and also for healthy environment for your employees.
- The lack of knowledge is a result of the lack of training which is given to employees. There needs to be a better program for employers to provide new employees on what exactly they will be selling so employees will give the best possible assistance to customers.
- Most are not aware of the existent systems can offer nor how to use them.

Order the level of skills provided by the respondents (1 = most excellent 8 = most terrible)

1. Social media
2. Selling online through own webshop
3. Cybersecurity
4. Digital marketing
5. Tracking/analysing online consumer behaviour
6. Selling online through agents
7. Online marketing campaigns
8. Business intelligence

Which retail skills are considered important for the future? (1 = most important, 8 = less important)

1. Digital marketing
2. Social media
3. Business intelligence
4. Tracking/analysing online consumer behaviour
5. Cybersecurity
6. Online marketing campaigns
7. Selling online through own webshop
8. Selling online through agents

Are there any skills missing in the list provided in the survey?

- *No*
- *Better introduction of soft skills and consumer behaviour*
- *Bad*
- *Handling information/personal data; GDPR; Email Marketing*
- *Skills regarding online banking*
- *Knowledge on sustainability*
- *Knowledge regarding certain products*
- *Certain knowledge about products*
- *If you can consider patience as a skill, I would say patience :)*
- *Leadership*
- *A clearer definition of what AI is and what it can offer.*

- *None*

How would you like to learn about these skills? (1= most preferable, 7 = not preferred)

1. YouTube videos
2. Case studies
3. Stories
4. Podcasts
5. Books
6. Text

How much time are respondents willing to invest in improving their skills?

- *1-2h/week*
- *Enough to ace it*
- *Few hours*
- *1 hour a week*
- *As much time as is needed to ensure that I am improving myself and my skills for better future opportunities*
- *As long as I keep working in such sector*
- *Not that much since it's not my career path*
- *As much as I can (given how fast things change)*
- *A lot of Time since skills are the key to business*
- *Necessary time*
- *1 day weekly*
- *5 hours weekly*
- *1 week*
- *A month*
- *6*
- *6 hrs a week*
- *2 hours a day*
- *Part time.*

INTERVIEWS

Name of interviewee	Chris Vassallo Cesareo
Nationality	Maltese
Function (job description)	Managing Director
How much experience in the field of retail (in years)	20 years working at Domestica Ltd, a family-owned furniture business.

1. How did COVID-19 change the retail industry and how did this affect the current level of skills?

Covid-19 has affected the retail industry in a number of ways, the most prominent being the need to urgently upgrade technology and specifically focus on elements that were previously done by people. Covid-19 pushed us to become more tech-savvy to meet consumer demands. Clients are now doing their research online and come to a decision on what they required by themselves. They only need to come to the retail outlet to conclude the sale. Technology has also aided in keeping stock of what is available in the store and which products are selling. This does not mean that we do not enjoy meeting people and giving them the tactile and more visual and personal experience that an online purchase cannot provide.

2. Which skills do you think are most important in the 'present' retail sector?

Salespeople need to have the right technological skills so that they can enhance the customer experience and meet their needs. However, they must also be capable of giving attention to detail, be well-informed about the products they are selling and able to explain the benefits and advantages of purchasing these products. Ultimately, it is the person selling that makes the difference between buying in-person and online so ensuring that your employees have the right skills is important.

3. What are the current skill gaps in the retail industry and which one do you consider most important to focus on?

Rather than a gap I would call it a learning process, in which people need to adapt to changing needs. Employees who do not have English or Maltese as their first language might need to be trained to gap the language barrier. Inexperienced salespersons need to be trained, especially in the field of technology. They must not only answer client queries but guide them into ultimately purchasing products by offering alternatives and guiding them to make the right choice.

4. What would be the future trends to anticipate on? And how can we anticipate for them?

Clients are becoming more sophisticated and demanding. They will purchase from companies that are flexible and reliable with good, fast customer service since their time is limited. The right product must be delivered, there is no time for returning items and clients do not want this extra hassle. The most appealing experience for clients is purchases that take minimal time investment. They are aware of products that are available on the online market and require efficiency.

5. When teaching any retail-related topic, which approach is most effective? Which method/activity do you like most?

Our approach is to teach that clients are treated not only as such, but also as a friend. Clients have requirements and we must be ready to guide them to purchase the best products that fulfil these requirements. It is our responsibility to understand and satisfy that need whilst making the client comfortable and confident enough to return. Our ultimate goal is to have customers for life. This is not an easy task since we all make mistakes in the process.

Name of interviewee	Gilbert Guillaumier
Nationality	Maltese
Function (job description)	Associate Partner EY
How much experience in the field of retail (in years)	Over 13 years of experience in providing professional support to private and public sector clients, including retailers.

1. How did COVID-19 change the retail industry and how did this affect the current level of skills?

The retail sector must have the digital capabilities to understand the growing range of consumer needs. Malta has always had a shortage in digital skills – this shortage has also been noted globally. In Malta scores well in digital skills penetration rates, as the majority of the population have a luxury of having access to diversified digital skill sets learning. The demand has now significantly increased in retail as companies now have to invest heavily in building digital capacity due to the increasing popularity of convenience online shopping.

online, local retails that were not prepared for this acceleration of digitalisation had no other option but to build an online presence – a “survival requirement”. The pandemic thus accelerated the digital movement in the retail industry in Malta. This dynamic highlighted the skill gaps in this area present locally.

2. Which skills do you think are most important in the ‘present’ retail sector?

The retail sector must have the digital capabilities to understand the growing range of consumer needs. Malta has always had a shortage in digital skills – this shortage has also been noted globally. In Malta scores well in digital skills penetration rates, as the majority of the population have a luxury of having access to diversified digital skill sets learning. The demand has now significantly increased in retail as companies now have to invest heavily in building digital capacity due to the increasing popularity of convenience online shopping.

3. What are the current skill gaps in the retail industry and which one do you consider most important to focus on?

Acknowledging the current skills gap in digitalisation brings on an element of innovation but the level of skills remains in demand and acutely. There is also a shortage of knowledgeable people in this area locally. When speaking with retailers, the skills that are the most important are digitalisation but also skills relating to service delivery and soft skills when trying to find qualified and trained salespersons. There is a major shortage locally, which is adding additional pressures. This is what the local context should focus on.

important to focus on?

4. What would be the future trends to anticipate on? And how can we anticipate for them?

In the immediate future, retailers have to invest in their online presence and in building capacity in digital skills. This is because the current trend that local retailers are noticing is that the customer's shopping experience is starting online (when they browse for products, see what they like, what is available and what is not) and ends in the physical store/shop/outlet to buy it at that instant. This includes retailers of various basket of goods – jewellers, digital equipment, furniture – which are all experiencing a similar trend. Ultimately, this is what is meant by “retail therapy” – the consumers enjoys that retail rush, and shopping experience and local retailers must be able to tap into and build on that consumer impulse.

5. When teaching any retail-related topic, which approach is most effective? Which method/activity do you like most?

There are 2 types of training: there is training in the sense of knowledge transfer and training in the sense of skills-building. Knowledge transfer involves a training approach that educates how to go about a certain process, delivery of normal training. Skills-building on the other hand, is more hands-on, but is the most effective. In relation to the digital skills gap and service delivery skills (2 important retail-related topics), this is one of the best approaches as it involves interaction, workshops, and case studies.

RECOMMENDATIONS

Based on the survey and in-depth interviews, the following recommendations have emerged.

THE KNOWLEDGE GAP IN RETAIL

The results from the survey indicate that retail employers and employees in Malta are not aware of the digital skills gap in the local retail sector. This presents a challenge as digital transition is rapidly transforming businesses across all sectors, including that of retail.

From the interviews, gaps such as shortage of digital/technological skills, service and delivery skills, soft skills, and language barriers were identified. Perceiving the digital gap as a learning process and as a step towards innovation is one of therefore one of the recommendations that emerged.

MOST IMPORTANT SKILLS

From the survey:

1. Digital marketing	2. Social media
3. Business Intelligence	4. Tracking/analysing online consumer behaviour
5. Online marketing campaigns	6. Cybersecurity
7. Selling online through own webshop	8. Selling online through agents

Relevant suggested skills:

1. Handling personal data	2. GDPR
3. Email marketing	4. Skills regarding online banking
5. Sustainability	6. Artificial Intelligence

The use of local e-commerce platforms indicates a persistent shift towards the digital transformation in the local context, especially in the post-pandemic. The pandemic required that shops had to close their doors and build an online presence, hence having digital skills and offering these to the consumer became a “survival requirement”.

Salespeople require the right technological skills/digital capabilities to enhance customer experience and meet their needs. Additionally, they must have service and delivery skills, accentuate their attention to detail, be well-informed about the products and the right communication skills to outline the benefits and advantages of the products they sell.

TRENDS IN RETAIL

In the immediate future, retailers must invest in building capacity in digital skills as customer’s shopping experience is starting online (products research and availability) and concluded in the physical store/shop/outlet wherein the sale is concluded. This applies to various kinds of goods includes such as jewellers, digital equipment, furniture. They are all experiencing a similar trend. “Retail therapy” refers to the consumers enjoying this transitional shopping experience

THE LEARNING APPROACH

Catering to the client’s need and preferred purchasing format is the mindset needed to push retailers to invest in building digital capabilities to meet and fulfil their requirements. Ultimately, understanding and satisfying customers’ needs is the retailer’s responsibility that should be imbedded in the ToRRe learning approach.

Knowledge transfer remains an important training approach, and skills-building is the effective method, especially in relation to gaining digital skills and service delivery skills. This approach would include interaction, workshops, and case studies.

From a Malta perspective, the survey results, indicate that following video materials were the preferred approach, case studies were the second most preferable way respondents chose to learn more about these skills. Stories, podcasts, books were the other preferred approaches. This gives ToRRe partners a better indication of what type of learning approach should be developed – therefore the PowerPoint format as indicated in the proposal, a proven practical tool for VET teachers should be integrated with videos and case study materials to support retailers in their digital journey. PowerPoint provides tools to make the modules more interesting by using various multi-media so that the user will find this tool more coordinated and structured

The fact that there are varied indicative timings for the choice of course greatly accentuates the need for having an online tool in this PowerPoint format that can be accessed on demand. Furthermore, the modules should be separate so that users with limited time resource can accentuate on the modules they believe they require.

BEST PRACTICES

What free (online) training courses are available on national level, which we can use as best practice?

On a national level we failed to find anything available as online and have included the current coursework available

Name	Type of training	Description	Which innovative tools used? (if any)	Rewarding system (e.g. certificate)	Link
Institute of Business Management and Commerce	Award in Retail	30 ECVET This programme is intended for learners who would like to become familiar with the local retailing sector, in particular small retail shops. Learners who apply for this course need to be genuinely interested and willing to work in a post related to the retail sector. Learners will become familiar with the basic business concepts, including the principles of stock management. They will also be made	Class-based and community-based learning (to be ascertained through a 3-day workshop at MCAST, attendance for which is compulsory)	Finished Compulsory Education, Commitment to prospective employment	https://www.mcast.edu.mt/courses/bc1-04-21/

		<p>aware of different types of customers and situations that people who work in a retail environment would typically face. To achieve this, learners will be exposed to the importance of, and the skills required for good communication, as well as teamwork</p>			
MCAST	Master in Retail	<p>90 ECTS</p> <p>Master in Retail focuses on the learning and practical application of concepts essential for operating and marketing a retail business. This programme develops an understanding of the contemporary retail environment and examines topical issues relating to retail management and marketing. This programme assesses analytical skills essential for operating and marketing in an international retail environment with a view to putting this knowledge into practice. structured to reflect the needs of modern business retail dynamics. Taught by industry experts and leading academics who have had successful careers in their respective business settings.</p>	Blended learning	Masters' Degree	https://www.mcast.edu.mt/courses/ri7-01-21/
Secondary Schools	VET O level standard	<p>The aim of the vocational programme in Retail is to provide students with the</p>	<p>During each scholastic year, students will cover a unit and</p>	<p>O level standard of education (Level 4)</p>	<p>https://eur-oguidance.gov.mt/wp-content/up</p>

		<p>knowledge related to basic retail operations. Retail is the process of selling consumer goods or services to customers through multiple channels of distribution to earn a profit. Retailers satisfy demand identified through a supply chain. By the end of the programme, students are expected to have gained sufficient skills and should be able to apply knowledge and skills in a learning environment.</p>	<p>so throughout the three years, students complete 3 units. During the year, each unit is assessed by means of • two (2) assignments (60% of the yearly mark) that consist of both written and practical tasks • one (1) assessment (40% of the yearly mark and issued by MATSEC) that consist of a written examination The marks obtained during years 9, 10 and 11 will amount to 100% of the final Secondary Education Certificate (SEC) result.</p>		<p>loads/2021/02/THE-OPTIONS-HANDBOOK_WEB.pdf</p>

What free (online) training courses are available on international level, which we can use as best practice?

Name	Type of training	Description	Which innovative tools used? (if any)	Rewarding system (e.g. certificate)	Link
Retail Management: Merchandising, Sales and Customer Communications	Online	Free online retail management - introduction to the basics involved in managing a retail outlet. principles behind sales techniques, how to effectively	Online	Based on achieving over 80%	https://alison.com/course/retail-management-merchandising-sales-and-customer-communications

		merchandise products, and the most constructive ways to communicate with customers.			
Skill Share Varied Course	Online	Short videos related to subject matters	Video lessons	None	https://www.skillshare.com/browse/retail

Current state of the retail sector in The NETHERLANDS

Introduction

The actual retail sector in Friesland as well as the rest of the Netherlands, has a huge personnel shortage. Quite frankly, this is something that is hitting every sector in the Netherlands at the moment and is causing disruption of the labour market. A quick search for retail job openings on LinkedIn in Friesland gives you 790 results (21-6-2022).

In the last couple of years, the retail market itself has also changed. During the last two year the consumer in the Netherlands has made a change from partly shopping online to a hybrid form. This means that the consumer informs and compares the products online before they buy the product in the shop. There has been an increase in the people who prefer shopping online, especially in the age group 55+, which went from 10 percent to 26 percent. The increase in online sales has led retail web shops to a 350 percent extra profit.¹ While it might be that more people go shopping online, 64% prefer the personalized aspects, they receive in the shops.² Customers also have the tendency to buy more once they are in a physical shop.

However, due to the change to a more hybrid form of shopping, it is expected that 19 percent of physical shops will close down. In the non-food sector it is even expected to be 25 to 30 percent.³ This degree in physical shops is expected to hit the hardest in cities and shopping centres. Small shopping areas have seen an increase of 12,5 percent in sales, due to people buying more locally.⁴

Furthermore, the consumers are being more conscious in what they buy, this shows how sustainability and inflation is affecting customer behaviour.

Thus, in the Netherlands the personalized aspects help retail owners to sell, however, their online shops help to both sell online and attracting consumers to their physical shops.⁵ Yet, personalized attention to customers is hard to give with a lack in personnel.

SURVEY RESULTS

How many responses did you collect?

35 responses

Country

The Netherlands (100%)

Years of experience

Less than 1 year	14,3%
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¹ https://retailand.nl/app/uploads/2020/07/Retailagenda_Retail-postcorona-impactanalyse_juli2020_DEF.pdf

² <https://retailtrends.nl/news/67180/consument-gaat-het-liefst-naar-fysieke-winkel>

³ <https://fashionunited.nl/nieuws/retail/de-blijvende-impact-van-corona-op-het-retaillandschap-dit-zijn-de-verwachtingen/2020072146089>

⁴ <https://www.retailinsiders.nl/docs/7a8320e3-32bb-4eef-a05b-8f47ba1def91.pdf>

⁵ <https://retailtrends.nl/news/67101/nederlandse-shoppers-navigeren-tussen-bewust-consumptiegedrag-en-hybride-shoppen-nbsp>
<https://retailtrends.nl/news/67180/consument-gaat-het-liefst-naar-fysieke-winkel>

Between 1 – 3 years	31,4%
Between 3 – 5 years	28,6%
Over 5 years	25,7%

Lowest number respondents had less than 1 year experience (14,3%) and most of the respondents have between 1 – 3 years of experience in the retail industry.

Business owner or employee?

Employee	71,4%
Business owner	28,6%

The knowledge gap in the retail sector

Most of the respondents (77,1%) don't know exactly the skill gap in the retail industry. This links with the number of respondents indicating they are 'only' employee. Employees might not have the knowledge and ambition to grow in the retail sector and don't know the exact situation in the field.

A total of 22,9% of the respondents indicated they might know about a skill gap, which they identified as follows:

- "Older" employees in the retail industry don't know how to work with social media, while it's increasingly important
- Very few colleagues have the knowledge to analyse customers' needs and how to apply online/digital tools to meet these needs. Besides this, a lot of colleagues are working part time and simply don't have the time to invest in these skills
- We're not futureproof. We need to be more flexible, sometimes we're taking things for granted and we do not know the customer anymore
- Online safety is getting more and more important. How do I know if my customer's data is safe?
- There is a lack of experienced and specialized employees. This results in a loss of important knowledge and decreases the possibilities to specialize and focus on certain opportunities
- Strategic planning
- A lack of personnel. This stops the transfer of valuable knowledge. Besides this, people often use the Retail market as an 'in-between' job, mostly part time, and therefore the acquired knowledge doesn't remain in this sector.

Order the level of skills provided by the respondents (1 = most excellent 8 = most terrible)

1. Social media
2. Digital marketing
3. Online marketing campaigns
4. Selling through online agents
5. Selling online through own webshop
6. Tracking/analysing online consumer behaviour
7. Business Intelligence
8. Cybersecurity

Which retail skills are considered important for the future? (1 = most important, 8 = less important)

1. Digital marketing
2. Selling online through own webshop

3. Social media
4. Tracking/analysing online consumer behaviour
5. Selling online through agents
6. Online marketing campaigns
7. Cybersecurity / Business Intelligence

Are there any skills missing in the list provided in the survey?

- Online sales skills and sale skills in general
- There is a lack of product knowledge and social skills. Working in a physical store isn't 'cool' anymore, which makes it harder to find good personnel. This influences the consumer experiences in stores. Existing retailers could benefit a good 'in-store' experience of consumers, to increase online sale
- Recruiting personnel
- Hospitality skills in stores. People know less and less what to do and how to help the consumer. What is needed to help the consumer in the best possible way (mostly applicable at the younger colleagues)
- Maintaining knowledge and how to facilitate acquiring knowledge online? This would help to educate new personnel faster
- What is the future of the retail industry? More shops like CoolBlue and Amazon? How can we anticipate?
- Online payment methods
- How to deal with feedback of the consumers (complaints, etc.)
- How to educate my personnel? External, internal, etc.
- Flexibility
- Online systems to schedule personnel
- Co-work and collaboration with other organizations/companies to generate additional leads
- Finances
- How to expand my assortment
- How to apply for grants/subsidies

How would you like to learn about these skills? (1= most preferable, 7 = not preferred)

7. Stories
8. (YouTube) videos
9. Podcasts
10. Case studies / examples
11. Units/modules/text
12. Books

How much time are respondents willing to invest in improving their skills?

Average of 4 hours a week for one month = 16 hours.

Please save the email addresses in your own account, no need to share those in the national reports. We might need them in the future (newsletters, testing, etc.)

INTERVIEWS

Name	Tieids Breeuwsma
Nationality	Dutch
Function (job description)	Shop owner

How much experience in the field of retail (in years)	25 years
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1. Could you provide us with some information on the level of VET skills in the retail sector in your country?

There are several skills being taught in the Netherlands at VET level. Skills to consider are: Sales techniques, Communication, Calculation, Service and client focus, and proactivity and initiatives.

2. How did COVID-19 change the retail industry and how did this affect the current level of skills?

Due to COVID many shops had to close. This has led to depreciation of skills/experience. But some shops were open. COVID brought a good common topic to talk about and to express humanity and demonstrate client focus. It provided a connection between retailer and customer.

3. Which skills do you think are most important in the 'present' retail sector?

Tieids believes Sales techniques, Communication, Calculation, Service and client focus, and proactivity and initiatives are the most important skills.

4. What are the current skill gaps in the retail industry and which one do you consider most important to focus on?

Experience is not what they teach at school, but that's what you need. Product knowledge is often specific per shop and you need to be taught on the job. It is important to focus on the combination of learning and doing.

important to focus on?

5. What would be the future trends to anticipate on? And how can we anticipate for them?

As the expectation is that less consumers will shop, because of rising price levels. You have to look for something to stand out. Those things that can make you stand out are: client friendliness, organising parties/experiences (testing), relaxed on return policy.

6. When teaching any retail-related topic, which approach is most effective? Which method/activity do you like most?

COVID made the relation between companies and education disappear. Before COVID many schools tried to fix job placements. Nowadays it is silent. The connection seemed to have disappeared.

Name	Henk Split
Nationality	Dutch
Function (job description)	Business Consultant Retail (YnBusiness)
How much experience in the field of retail (in years)	25

1. Could you provide us with some information on the level of VET skills in the retail sector in your country?

Employees: Level of skills isn't sufficient most of the times. Employers have a hard time holding their employees. In the Netherlands, the image of working in the retail sector isn't very good. It is seen as the sector to work in when you're not educated or just not smart enough to do something else. In the past years, this image became a bit better and salaries increased, however, workers mostly see it as a 'starting job' and go somewhere else once they are more skilled.

Employers: Employers should focus on their human resource policy and keeping their employees satisfied, trained and inside their company. Currently, they have a hard time finding the right personnel and keeping them satisfied so that they stay for a while. This is difficult to turn around. Employers in general are skilled to run the business in Retail, however, do not always see the importance of anticipating on future trends and consumer behaviour.

2. How did COVID-19 change the retail industry and how did this affect the current level of skills?

"Smart" employers have anticipated on the changing world and did research on the opportunities and chances of this changing world. How can these opportunities be transformed into new strategies for their business and what are the possibilities within their reach. Consumer behaviours have changed and online shopping became very big, which also resulted in targeted purchasing of consumers. At home, they do research what they need and then go to the shop to buy it. They won't go outside to bigger shopping areas to shop all day, but go to local, smaller centra, to buy what they actually need.

3. Which skills do you think are most important in the 'present' retail sector?

Hospitality and specific knowledge on their products.

Gap can be found in lack of education and renewing strategies. Most employers are unconsciously incompetent and only think on short term actions only. They don't see the purpose of thinking on the long term and don't even think about that it might be important to changing their business models. During conversations with employers, you can make them conscious of the importance of changing strategies.

Also, there is a gap in the connection between the work field and education. The offer in curricula at school, often doesn't fit and match practice. Schools do see the importance in changing, however, it is often hard to change such a big organization and its curricula on a short notice. Once they changed, customers and market demands have changed already. They could focus more on practice and internships, to match curricula with practice.

Additionally, knowledge in ICT and applying sustainability measures are important nowadays. Often this is underestimated by employers and don't see any value in investing in these skills and strategies. It's increasingly important to get to know the target group. Obviously, statistics can be analysed when having a webshop, however, the one-on-one talk with the customer will make the employer keep track of habits, needs and behaviours. So physical shops are still important to keep the connection with customers.

In order to attract more visitors to the city centre (the larger ones), it is important to connect with restaurants, bars and other related companies situated in the city centre. Customers want to have a full experience if they go shopping all day, and won't come to shops only, without having a lunch or 'package-deal' with other companies which might be interesting for them. In Leeuwarden, [Arcadia](#) is running, which attracts many visitors in the Netherlands to come to Leeuwarden. More cities should do this.

4. What are the current skill gaps in the retail industry and which one do you consider most important to focus on?

Flexibility, ICT and human resource policy.

Flexibility: as an employer, you have to change your strategies as consumers are also changing their purchase habits. Employers have to see what's changing and should anticipate on this. Still, quite some employers stick to their own strategies as this is what they always did and think that changing their strategies won't help them. They don't see the purpose of changing anything. It costs money, time and don't want to invest in something which they aren't convinced of that it would benefit them.

Human Resource policy: employers have to invest in their personnel to keep them. (see answer at Q1). They should attract their attention and commit them to the cause of the company.

ICT: These skills became increasingly important during COVID and will become more and more important in the future.

5. What would be the future trends to anticipate on? And how can we anticipate for them?

Sustainability and circularity. The world is changing and regulation will play a big role in the future of organizations (in all sectors). Employers should prepare for this, although they think it's a difficult topic. Many employers see sustainability and circularity as something to invest in on the long term, not today or tomorrow. Besides the coming regulations, customer behaviour also plays a big role. Customers are more conscious about the environment and more often choose sustainable products and services. Employers should see their investment in sustainability as a good thing. It can 'pimp' their image and attract different customers.

6. When teaching any retail-related topic, which approach is most effective? Which method/activity do you like most?

Most effective are personal (one-on-one) conversations directly with the employee/employer.

Online training materials could work, but only if they have been contacted before and informed about the course. There is a demand, but it should take too much time. As we want to target SME employers, we should write the training materials in simple language and practical examples should be given. Not all employers are high educated and acquainted with business language.

RECOMMENDATIONS

The knowledge gap in Retail

Merging answers from both the survey and interviews, it is important to focus on flexibility, human resource policy and ICT. Employers should be willing to change their strategies, as customer behaviour is changing also. Additionally, ToRRe should pay attention to maintaining knowledge in their company and the Retail sector in general. Often, employees don't stick around and see the Retail sector as an "in-between" job. How to keep employees satisfied, so they'll stick around, get more experienced and specialized, and how to keep them so employers don't lose the acquainted knowledge. Besides the above, the sector has changed due to COVID, which allows for digital tools and strategies. Employers should anticipate on this and become more digital. Obviously, the connection between customers and retailers should be maintained, to be acquainted with the consumers' needs and desires.

Most important skills

Listed from the survey:

1. Digital marketing	5. Selling online through agents
2. Selling online through own webshop	6. Online marketing campaigns
3. Social media	7. Cybersecurity / Business Intelligence
4. Tracking/analysing online consumer behaviour	

Additional skills:

Human Resource Policies	Co-work and collaboration with other companies	Flexibility of employers
Online skills and sale skills in general	Social skills / hospitality skills	Recruiting and maintaining personnel
Online internal education facilitation	Using online internal systems (Online payment methods / online scheduling of personnel)	How to deal with feedback of the consumers (complaints, etc.)

Trends in Retail Industry

Sustainability and circularity

The world is changing and regulation will play a big role in the future of organizations (in all sectors). Employers should prepare for this. Not only future regulations regarding sustainability and circularity, but also consumer behaviour will play a big role. People find it increasingly important that organizations apply sustainable and/or circular strategies.

Focus on Unique Selling Points

Companies should focus on the 'perfect experience' for their consumers. People tend to shop more local and don't go shopping for a full day and buy 'random' stuff. They choose at home and go buy it at the local shops/shopping mall.

The learning approach for ToRRe

ToRRe should focus on practical short materials, such as videos, podcasts and stories of likeminded employers/employees. Additionally, 1-on-1 chats would be most efficient, however, not feasible for the project. ToRRe could focus on rebuilding the connection between education and practice, for example by facilitating internships and practices. Students should learn on the job, which is most effective. For employers; approximately 10 – 16 hours in total (4 hours a week).

Inspiration and best practices

A notable detail during our search of best practices, is that we couldn't find much interesting relatable trainings and courses. At least, no free trainings were so impressive on innovation, that it gave us the impression that no innovative training related to the ToRRe subject is widely available on the internet in the Netherlands and Europe wide. We gave the best options (see ANNEX) nationally and internationally, however, not all examples are free accessible.

BEST PRACTICES

What free (online) training courses are available on national level, which we can use as best practice?

Name	Type of training	Description	Which innovative tools used? (if any)	Rewarding system (e.g., certificate)	Link
Skillstown	Different trainings (paid)	Online training for the retail Branche, also gives training on digitalization. Training made for employees working in shops	Continues to update and gives room for retailers themselves to add own training topics/curricula	Certificates for some courses	https://skillstown.nl/branches/retail/
Werkindewinkel	Different courses (most courses are free)	A retail marketing company which focusses on training the online presence of the retail sector.	Just e-learning	No rewards	https://www.werkindewinkel.nl/retail-opleidingen/

					gratis-e-learnings
Caza Consulting	A scan which helps to see in which courses there is a training required (paid)	A consulting company which helps retail and hospitality sectors to adjust their shops to have a good structure both online and offline.	A scan to see what the company has on digitalisation	A scan to see what the company has on digitalisation	https://www.cazaconsulting.nl/dienst

What free (online) training courses are available on international level, which we can use as best practice?

Name	Type of training	Description	Which innovative tools used? (if any)	Rewarding system (e.g. certificate)	Link
Futurelearn	Online training	An online course which teaches entrepreneurs the change which the retail sector has gone through. This helps them understand how they can adjust this to their own companies.	-	Finish the course	https://www.futurelearn.com/courses/digital-skills-retail
EDX	Online courses	A digital website with online courses on different topics in business. They also have topic which relate to the retail sector.	Online platform	A certificate, which costs around 400 dollars.	https://www.edx.org/learn/digital-transformation
OliverWymann	Free online training	A trainings website on which you can follow different topics depending on your interests. There are quite some trainings for the retail sector on it.	Interactive website, with links to different informative websites or persons. Video explanations.	No rewards	https://www.oliverwymann.com/our-expertise/insights/2019/jan/boardroom-volume-4/workforce-planning-for-

					tomorrow--today/modern-learning-for-retail.html
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Current state of the retail sector in SPAIN

The bulk of Spanish companies are made up of entrepreneurs (self-employed) and small businesses. In 2020 according to INE data, 435.836 national companies operated in the retail sector, 1.7% less than the number of companies registered in the previous year. The majority of the sector is made up of microenterprises (98.4%). Therefore, it should be borne in mind that, being mostly solo-entrepreneurs or small companies (between 1-10 employees), their operations tend to be highly individualised and, in general, Spain, and more specifically the region of Extremadura, has been slow to incorporate new technologies into its retail activity. An example of this is that, even in 2020, very few companies in the sector with an Internet connection have a chat service to communicate with their customers (16.3% of national SMEs in retail).

In this regard, before COVID-19 significantly hit small local businesses, the level of digitization of national and regional companies was significantly low, this being especially relevant in mainly rural areas. To alleviate this lack of business digitalization, both the national government and regional entities have approved special budgets for 2022 with which to promote innovation in national SMEs (*Programa de Modernización del Comercio: Fondos Tecnológicos*, with a total investment of 100 million for fiscal years 2022 and 2023), with the ultimate goal of strengthening their competitiveness in the face of the rise of e-commerce and large commercial areas that proliferate in urban areas (especially colonised by international companies).

Today, the presence of small businesses on the Internet is essential, as evidenced by the proliferation of commercial websites and social media profiles during and after the first confinement. For this reason, retailers in Extremadura (and in Spain in general) are keen to upgrade their digital skills and competencies to improve their business performance and adapt to the changing needs of their customers.

Parallel to the support for the digitalization of retailers, in Extremadura it is also possible to observe an important support from public institutions to programs that promote collaboration between small companies and entrepreneurs (for example, the Program for the promotion of business cooperation, aimed at promoting the competitiveness and growth of SMEs in the Autonomous Community of Extremadura, either through the creation and/or consolidation and growth of Innovative Business Groups or Clusters).

Main source of information: [Informe de digitalización de las pymes 2021. Una visión por sectores](#)

SURVEY RESULTS

How many responses did you collect?

EOLAS managed to collect 35 responses via online questionnaire broadly disseminated among the national target groups.

Country

Except for 3 single entries (from Haiti, Afghanistan and Dominican Republic), the totality of the collected answers came from Spanish participants within the ToRRe main target groups.

Years of experience

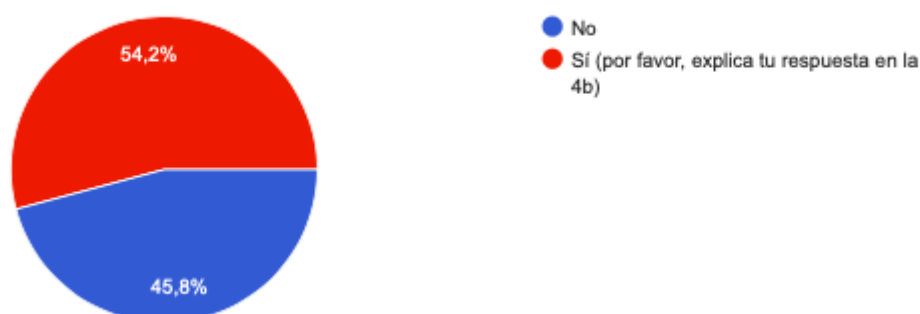
A large majority of respondents have over 5-years experience in the retail sector, followed by 25% of them who still have less than 1-year experience. Then, another 16,7% of them claimed to count on an experience of 1-3 years.

Business owner or employee?

When it comes to owners/workers, 16 of the respondents are owners of their retail businesses, while the remaining 19 of them are working as employees.

The knowledge gap in the retail sector

Interestingly enough, answers are quite polarised regarding their awareness of a potential knowledge gap in the retail sector.



For those who said being aware, the main concerns could be highlighted as follows:

- The need of rapid constant reinvention to keep up with new technologies and customers' demands
- In this day and age, entrepreneurs and business' owners always need to count on new training to update their skills in fields such as tech savvy, customer services, marketing tools, online selling legal and tax issues.
- Lack of information on tax duties and aids for SMEs and/or entrepreneurship
- Retail workers also claim their need to be trained in how their companies work, so as a way to have a broader knowledge and provide competitive advantages.

Order the level of skills provided by the respondents (1 = most excellent 8 = most terrible)

1. Social Media
2. Online selling through their own ecommerce platform/webshop
3. Online Marketing Campaigns & Business Intelligence
4. Digital Marketing & Tracking/Analysing customers' online behaviour
5. Online selling through external agents
6. Cybersecurity

Which retail skills are considered important for the future? (1 = most important, 8 = less important)

1. Digital Marketing & Business Intelligence
2. Online marketing campaigns
3. Social Media
4. Online selling through one's own ecommerce & Tracking / Analysis of customers' online behaviour
5. Cybersecurity
6. Online selling through external agents

Are there any skills missing in the list provided in the survey?

Some additional skills provided by respondents are the following:

- Research skills on how to predict new retail trends
- Business coaching
- Online Business Plan
- Social/soft skills
- One of the respondents pointed out that it may be interesting to also consider Google courses as an additional learning tool

How would you like to learn about these skills? (1= most preferable, 7 = not preferred)

1. Videos (Youtube)
2. Stories
3. Text content & Podcast (11 answers each)
4. Case Studies
5. Books

How much time are respondents willing to invest in improving their skills?

While it's true that some participants are keen on spending as much time as necessary in training themselves to improve their professional performance, the vast majority of respondents answered 1h per day/a few hours a week. Therefore, we need to bear in mind that time is a scarce resource for many among the ToRRe target groups.

INTERVIEWS

INTERVIEWS

Name of interviewee	Antonio Serrano
Nationality	Spanish
Function (job description)	Retail Consultant
How much experience in the field of retail (in years)	More than 30 years of experience

1. How did COVID-19 change the retail industry and how did this affect the current level of skills?

COVID-19 was a veritable earthquake in the retail sector. The consequences varied depending on the type of subsegment. While grocery and pharmacy retailers flourished due to the shift of consumption from large stores to small, local stores, fashion or electronics retailers were hit hard, giving a boost to e-commerce. Nevertheless, e-commerce and digital media have become generally accepted, making them imperative in both food and other retail.

2. Which skills do you think are most important in the 'present' retail sector?

Digital skills have become completely essential for the retail professional. Among others, we can list the following digital skills: digital marketing, e-commerce, user experience, digital management, Internet of things (IoT) and wearable technology, digital communication, digital advertising, web and mobile web, Big Data, innovation.

3. What are the current skill gaps in the retail industry and which one do you consider most important to focus on?

Due to a widespread use of digital technologies, there are already some very widespread skills and competencies, especially related to the use of social media and mobile devices. Digital management, for its part, has been evolving for decades, initially incorporating aspects related to purchasing and sales, and more recently the management of customers themselves through CRM. The use of the web and e-commerce is also very widespread, although retailers often hire external digital professionals. This is also true for digital advertising, digital marketing and digital communications, although more and more retail professionals are being trained in these areas. The biggest gap is currently in user experience development. Big Data and the IoT, the latest technologies that offer the greatest potential for application in the sector.

4. What would be the future trends to anticipate on? And how can we anticipate for them?

Future trends are difficult to determine, especially given the radical changes that have occurred recently. A few years ago, RFIC was thought to represent a radical lead in retail quality. However, in this day and age, digital commerce seems to be taking hold, meaning that the physical shop is becoming a simple "non-virtual" storefront where you can touch, smell and feel the product. New technologies such as customization (3D printing) could eliminate the need to transport the product (though not the raw material). Developments in drone technology, combined with the use of Big Data

and artificial intelligence (AI), could also make the typical courier delivery person obsolete. We could even do away with physical storefronts and move to VR technology to create completely virtual spaces where consumers can “try on” the product. When all this becomes a reality, the retailers as we have known it will be an expert in new technologies, able to design virtual storefronts, process data from made deliveries, or repair 3D printers.

5. When teaching any retail-related topic, which approach is most effective? Which method/activity do you like most?

I always like to focus on the practical aspects. theory cannot always be applied to the case and will be outdated in any case. For this reason, the workplace is the ideal place for training. In my case, it is better to put yourself in the student’s shoes than to resort to case studies, although they can for sure be useful. And when it comes to digital environments, the best methodology is “learning by doing”. After a theoretical lesson, I usually suggest the development of a real project that can be useful later on.

Name	Inmaculada Álvarez Trejo
Nationality	Spanish
Function (job description)	Sales Manager
How much experience in the field of retail (in years)	5 years of experience

1. How did COVID-19 change the retail industry and how did this affect the current level of skills?

The situation caused by COVID-19 was devastating for retailers, especially for those who did not have an online presence in advance. Those who wanted to continue their business activity had to quickly acquire digital skills to keep on with their online activity.

2. Which skills do you think are most important in the ‘present’ retail sector?

Digital skills such as: Digital Marketing, e-Commerce, User experience, Digital management, IoTs and Wearable technology, Digital communication, Digital Advertising, Web and Mobile Web & Big Data.

3. What are the current skill gaps in the retail industry and which one do you consider most important to focus on?

The digital gap is the one that most impacts the retail industry. While international retail companies are already well advanced in digital transformation, most Spanish companies have been timid about taking the plunge into new technologies. The current situation implies that companies that do not adapt to this new reality quickly could end up in the hands of the competition. This is why it’s necessary to address the organisational changes necessary to achieve the digital transformation of the sector.

4. What would be the future trends to anticipate on? And how can we anticipate for them?

I think that among the different digital technologies that are finding their place in the retail sector nowadays, there are several that will see significant advances in the coming years: social commerce, machine learning and personalised promotions, and new forms of payment that improve the user experience, etc.

5. When teaching any retail-related topic, which approach is most effective? Which method/activity do you like most?

Personally, I do also like to focus on a practical approach, and, for this reason, the workplace seems to be the ideal place for training. In the case of digital skills that we have discussed in the previous questions, the best methodology is “learning by doing”. So that, after a theoretical session, I usually suggest the development of a real project that can be useful later.

Name of interviewee	Pedro Fuentes
Nationality	Spanish
Function (job description)	Trainer
How much experience in the field of retail (in years)	20 years of experience

1. How did COVID-19 change the retail industry and how did this affect the current level of skills?

COVID has caused considerable changes in the sector, and has left an impact and consequences on it. There is less interaction with the client, and both staff and clients still have some level of fear to be “close to strangers'”, which hinders the client's experience and the quality of the service offered by staff.

There clearly has been a reduction of sales volume in the smaller commerce and retail businesses as a consequence of the pandemic, and this still persists today.

With regards to the level of skills, the digital skills have advanced as a way out of the impact of COVID. However other skills have seen a decrease in overall level of those already working in the sector, as well as those preparing and being trained to do so. The ones that have suffered most are empathy, communication, client service/attention and teamwork.

With regards to training and education offered, there are still less persons following face-to-face training than before the pandemic, and those attending show less ready and willing to engage in direct contact with clients. Training should focus more on communication, leadership and teamwork.

2. Which skills do you think are most important in the ‘present’ retail sector?

Nowadays it is obvious that the most important skills are related to the adaptation to new technologies and how to use the internet as a sales channel. Nonetheless there are non-digital skills that remain very relevant and important, such as the capacity to offer personalised customer service and care, as well as being able to multitask, i.e. capable of assuming different activities and functions within the retail business.

3. What are the current skill gaps in the retail industry and which one do you consider most important to focus on?

The gaps are related mostly to the following 3 skills:

- Adaptability/capacity to adapt,
- Leadership,
- Problem resolution.

There is a need for continuing learning and training on the work floor and directly related to the job, in particular on-the-job training.

The current formal training offer is still very much rooted in the past and the majority do not properly address the skills mentioned above. Some in-company training activities do cover these, but that is because this is demanded by the business.

4. What would be the future trends to anticipate on? And how can we anticipate for them?

The tendencies in retail that can be seen are that electronic commerce and on-line sales, will co-exist with proximity retail offers. But also, the traditional in-person sales will come back again. The retail businesses should prepare for new tendencies and changes, and they can do so by scanning the market, e.g., through market studies or SWOT analysis. Creative reflection is key, as the staff from the sector needs to be able to adapt the replies given to the customer. Normally one is too centred in getting the sales done, that there is not enough attention on analytical activities. Continuing training plays an important role in this, as it keeps the knowledge and skills up to date.

5. When teaching any retail-related topic, which approach is most effective? Which method/activity do you like most?

The most efficient method is to be close to the learners, i.e. understand them and motivate them. What works best is to put yourself as a trainer in the shoes of the staff and see what challenges they come across in their daily work. Simulations and role plays are very good methods. In fact, gamification of the activities is highly motivating and allows to transmit the passion for the sector and the client. It is important to make the learner feel part of the sector. What the trainers and educators from the sector need is useful materials which are easily reachable and accessible, there is an awful lot of information out there but not all useful or effective.

RECOMMENDATIONS

Taking into account the results obtained among the participants of the ToRRe target group in Spain, and thanks to the insights derived from the interviews with experts, it is possible to point out the following general conclusions, which should be taken into account in future steps of the project, such as the elaboration and development of the training program for the European retail sector:

- In general, in Spain, and especially in the region of Extremadura, retail professionals (mostly small companies or entrepreneurs), are aware of the current technological gap they face in order to be competitive and respond to their customers' needs. This has become especially relevant in the aftermath of the pandemic, since the need to have an online presence (and the consequent customer service, user experience, social media management, etc.) has become absolutely necessary.
- **According to respondents, the most important digital skills for the retail sector today are especially those related to online sales through proprietary channels, digital marketing and social media management, and business intelligence.** Consequently, these are the areas of training in which participants show the greatest interest.
- The importance of **soft skills** in a physical store environment, as well as in an online or digital environment, is equally important. Characteristics **such as naturalness in dealing with customers, empathy, communication skills, leadership, adaptability to change ...** are pointed out as interesting training areas to ensure an adequate digital performance in the current scenario.

Some additional skills provided by respondents are the following:

- o Research skills on how to predict new retail trends
- o Business coaching
- o Online Business Plan
- o Social/soft skills
- o One of the respondents pointed out that it may be interesting to also consider Google courses as an additional learning tool

Cutting-edge technologies & innovations: VR, new forms of online payment, personalised user experience, social commerce, big data for trend predictions in the retail sector,

Despite the great need for training seen among the target group, and their willingness to be trained in digital skills, it should be borne in mind that their **time resources for training are limited, so the training program should be designed according to these constraints.**

It is also important to take into account the **respondents' preferences for audio-visual formats (YouTube videos, podcasts, etc.) and other training and inspirational resources such as stories or case studies.** One expert trainer highlighted the importance of motivating learners, and, therefore, the potential of **gamification** activities.

In addition, and taking into account the expert opinion of those who participated in the interviews, it would be advisable to apply a **mostly practical approach.** That is, through the application of theoretical knowledge to **"real life" exercises** that are useful in the usual tasks of retailers. **Development of a "real project" or action plan for one's own organisation.**

BEST PRACTICES

What free (online) training courses are available on a national level, which we can use as best practice?

Name	Type of training	Description	Which innovative tools used? (if any)	Rewarding system (e.g. certificate)	Link
Extremadura Empresarial	Various e-learning courses for entrepreneurs and SMEs	The Extremadura Empresarial platform, in addition to offering advice and networking tools for entrepreneurs in the region, has a wide range of training resources available online and free of charge for the ToRRe target group. Among these resources we can find webinars, lectures, action guides and MOOCs such as: "Keys for the digitalisation of retail trade", "Training for sales, logistics and distribution channels", "Finances for entrepreneurship", etc.		MOOCs give access to a diploma at the end of the course	Catálogo de formación – Extremadura Empresarial
Cámara de Comercio de Cáceres	Various e-learning courses for entrepreneurs and SMEs	The Chamber of Commerce of Cáceres has a comprehensive catalogue of online training courses useful for the target group, whose mission is to boost the activity of the retail sector in the region and promote its digitisation. Some of the courses are fee-based.		-	Cursos Camara de comercio de Cáceres

AECOC		<p>The Association of Manufacturers and Distributors (AECOC) seeks to promote continuous training for SMEs online or through in-company training activities. In 2021, the Association's programmes brought together more than 2,400 professionals from 1,000 small and medium-sized companies.</p>	<p>Training methodology oriented towards the implementation of innovations in companies. Use of successful case studies with the participation of leading companies.</p>		<p>Cursos AECOC Oferta formativa con enfoque práctico</p>
<p>Programa de Comercio Minorista</p>	<p>Diagnosis of the current commercial situation and development of strategies to boost innovation and competitiveness of small and medium-sized retailers.</p>	<p>Training offered by the Chamber of Commerce of A Coruña and 100% financed by the Secretary of State for Trade of the Ministry of Industry, Trade and Tourism and by the European Regional Development Fund (ERDF). The aim of the training is "to promote the adoption, by the participants, of methodologies and solutions that allow them to improve their competitive situation and their degree of digitisation, adapting to the new technological solutions available to SMEs in the commerce sector and to the new forms and habits of consumption, helping them in the planning of business strategies that incorporate internationalisation and the adaptation of businesses with online sales to offer simple purchasing</p>	<p>Diagnosis of participating businesses and dissemination and training actions aimed at traders and entrepreneurs.</p>		<p>https://www.amaracoruna.com/programa/programa-comercio-minorista-2022/</p>

		processes, also helping them, through informative conferences and workshops on new consumer habits and new business opportunities, e-commerce, digital marketing, sales techniques..."			
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What free (online) training courses are available on an international level, which we can use as best practice?

Name	Type of training	Description	Which innovative tools used? (if any)	Rewarding system (e.g. certificate)	Link
LETZ Retail (Online)	Online training for European retailers	The Erasmus+ LETZ Retail project provides free, flexible online training for workers and entrepreneurs in the retail, hospitality and culture/creativity sectors in areas such as collaboration with other actors or various soft skills applicable to dealing with customers and innovation to meet their needs.	Interested parties can access the full programme, as well as best practice examples from small European companies, or focus only on areas of interest to them.	Not applicable	https://letzretail.eu
Shopify	Free training for retail and Ecommerce entrepreneurs	Training courses focused on helping entrepreneurs and online retailers to create and	-	Not applicable	Presentamos Shopify Academy: Formación gratuita para emprendedores minoristas y del Ecommerce

		manage their online shops on the Shopify platform. The focus is also on key digital marketing concepts.			
Reed	Free retail training courses	Platform containing online courses (free and paid) from different organisations. The search engine allows you to filter the courses to access those of interest to ToRRe's target group. The topics and the operation of the courses are varied, depending on the organisation providing the online training.		Not applicable	Free Retail Training Courses reed.co.uk
Classcentral	Digital skills: retail	Digital technology is transforming the world of retail. You will learn about the impact of this transformation, from data transforming customer experiences and operations to the growing impact of connected		Not applicable	Free Online Course: Digital Skills: Retail from FutureLearn Class Central

		devices and automation.			
Google Digital Garage	Online courses by Google	<p>Flexible online training courses that allow users to acquire knowledge in different areas related to entrepreneurship and business management. This flexible approach allows you to focus on one or more modules of each course, or to follow the complete training plan. Some relevant courses: Fundamentals of Digital Marketing, Connect with customers through mobile, Customer behaviour tracking, etc.</p>	<p>It also provides Live Learning options for specific trainings.</p>	<p>All courses include certification upon completion of the training. However, some certifications are subject to a fee.</p>	<p>Free Online Marketing & Career Courses - Google Digital Garage</p>