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European Sector Skills Council Textile Clothing Leather Footwear Report 2014

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A blue-tinted photograph of a person in a suit holding a smartphone, with another person's hands visible in the foreground. The image is used as a background for the title.

Foreword



FOREWORD

The social partners from the Textile, Clothing, Leather and Footwear sector have a common vision, namely that the industry remains the engine of the economy and is essential for growth and prosperity.

The story of the TCLF fits in that of the wider industry. For their expansion manufacturing companies depend heavily on exports and thus they are eminently global players. Their adaptability is essential for their success and survival.

Already in the nineties our companies have heavily reorganized. Through the outsourcing of activities many companies were reduced to their core. This costed jobs, since we had to compete with unequal resources and restrictive conditions. But precisely because of those hard restructuring our companies are still successful. The European TCLF sector is investing and providing employment. Of all the relentless investment in skills and human resources, both by national governments and within the companies, have made it possible to continue driving the global industry from Europe,

even though entrepreneurship is far from easy in Europe.

What the future will bring can not be predicted. Nevertheless, it is undisputed that the development and expansion of skills is the key success factor for any future.

Moreover, investing in skills allows us to keep all trails open. And even though a signal is not a trend, we should not blind to it.

The European Textiles, Clothing, Leather and Footwear manufacturing sector is undergoing a renaissance. A sector that has experienced a turbulent recent history is now beginning to re-emerge, leaner and more confident of its place in the world. Driven by creativity and innovation, products manufactured by the European TCLF sector range from traditionally crafted fashion and textiles goods through to scientifically-led technical items. All are popular in domestic and export markets alike and all produced with a distinct quality.

However, there are a number of immediate challenges to overcome that threaten to impact on the TCLF sectors growth potential. The sector has an ageing and experienced workforce nearing retirement who's high-level of skills could soon be lost to the sector. Associated to this, there is a need to attract a new generation of workers and to train them effectively.

Given this, we have to consider very carefully how we plan TCLF skills investment in this sector, where such fundamental change has occurred and where a number of key employment and skills challenges remain. Ensuring changing TCLF requirements are fully understood and that skills solutions and their delivery mechanisms are effective in meeting employer needs is therefore imperative.

Enabling the TCLF sector to meet these challenges and that a renaissance can breakthrough will require a concerted effort from all industry stakeholders. A true, focused partnership between the European Commission, individual nations, employers, professional bodies, trade associations

and unions is essential. Additionally it requires the ability to influence and to guide change at all levels of the education, skills and training system.

The European TCLF Sector Skills Council is uniquely placed to contribute to this effort and to make significant positive impact on both for the future of the sector, embedded in wider European re-industrialization strategies. But most and for all, there needs to be recognition that the future for the TCLF sector can be different.



Francesco Marchi



Carmen Arias



Luc Triangle



Gustavo Gonzalez Quijano



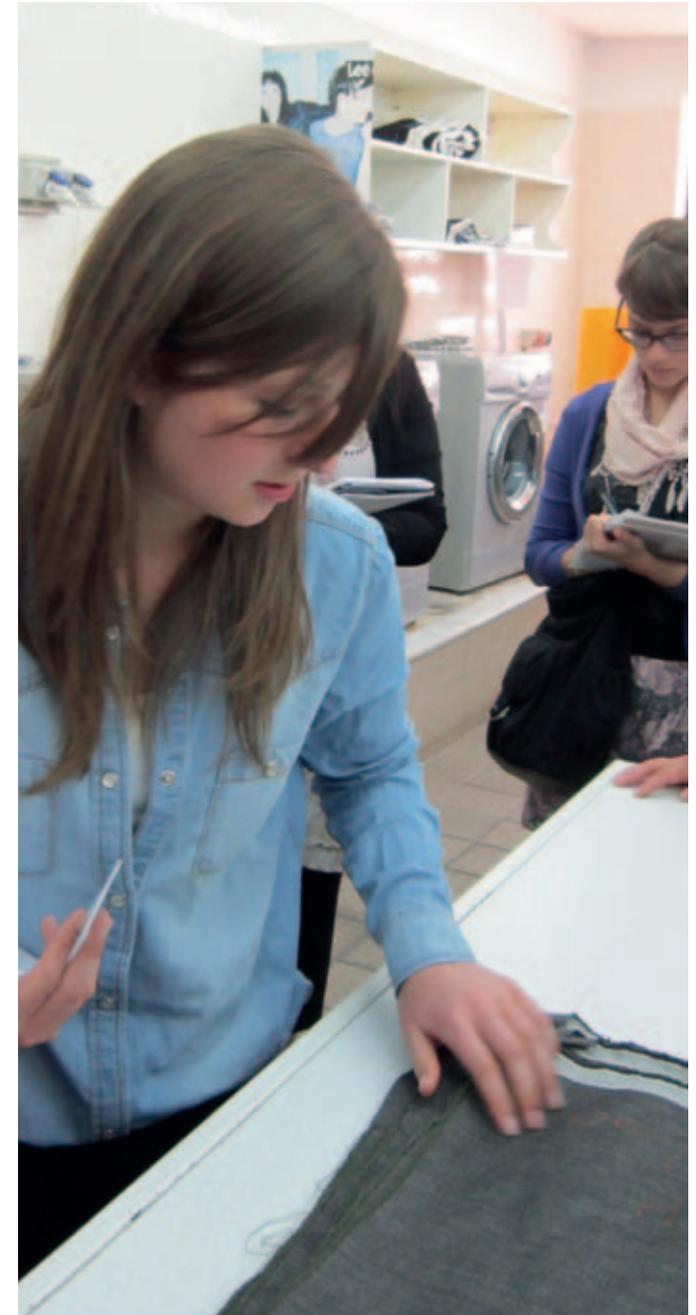




Introduction and Executive Summary

KEY FIGURES FOR THE TEXTILE, CLOTHING, LEATHER AND FOOTWEAR SECTOR

- ✓ The TCLF employs more than 2 million workers, of which 51% in the clothing industry, 31% in textiles, 13% in the footwear industry and 5% in the leather sector.
- ✓ Italy remains by far the largest employer of the TCLF sectors. Almost one in four TCLF workers is Italian.
- ✓ More than half of the entire European employment in TCLF is concentrated in four countries. Besides Italy, the other high employing countries are Portugal, Poland and Romania.
- ✓ In Bulgaria and Portugal TCLF weigh relatively heavy in the economy. Almost one Bulgarian out of twenty works in the TCLF sector, representing a quarter of employment within the Bulgarian manufacturing industry.
- ✓ Traditionally, TCLF industries employ a high proportion of women, not only in services and administration but also in production activities.
- ✓ TCLF is an ageing industry, increasingly reliant on the skills of older workers.
- ✓ There are significant productivity differentials between the subsectors within the TCLF. Textile is more capital intensive and relatively higher added value production, whilst apparel and leather create relatively more jobs.
- ✓ The size of the companies is quite small (average employees per company in textiles: 10, in clothing: 8, in leather: 9 and in footwear: 14 - source: Eurostat) highlighting the SME character of TCLF.



2014 has been the third year of activities of the European Sector Skills Council of the Textile, Clothing, Leather and Footwear sector. Founded in 2012, the TCLF ESSC aims at improving the level of education, skills and employment in the Textile Clothing Leather and Footwear sector, addressing among others issues regarding training, qualifications and skills of the European labour force in these Industries, the appeal of the sector for attracting young professionals and the assistance needed by enterprises for being more flexible in meeting changing competitive demands.

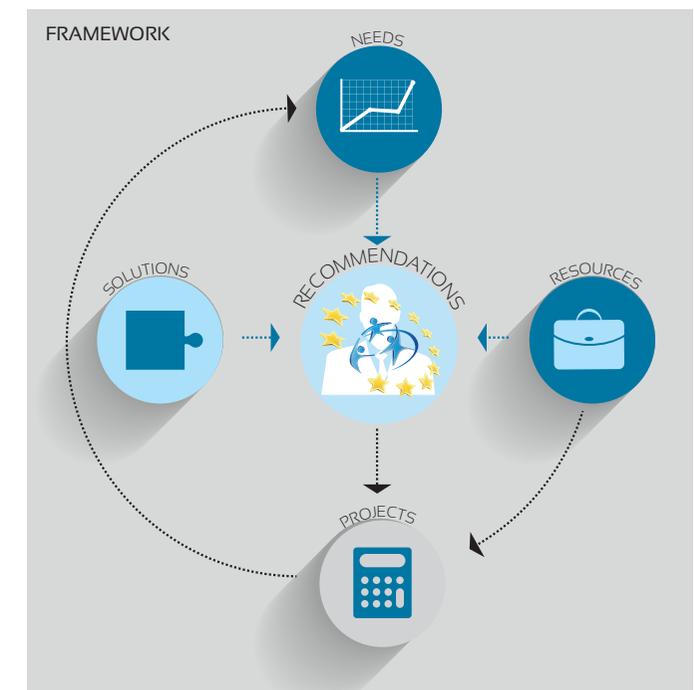
By bringing together key industrial stakeholders, educators, bi-partite and tri-partite organizations dealing with education and skills development, and interested government representatives, our TCLF ESSC aims at addressing a wide range of issues related to image and technological change, qualification standards and practices, planning, and human resource development. Through their participation, the EU social partners pledge to cooperate actively and loyally with the EU TCL SKILLS COUNCIL and to contribute to its success in a spirit of openness and transparency.

Overall, the statutory missions of the EU TCL SKILLS COUNCIL are:

- To monitor labour market developments in the TCLF industries and contribute to the active networking/ information exchange of the involved sectoral national ISPs and/or the respective social partners at European level regarding Education Training and Employment;
- To carry out reports/surveys/analyses to construct and maintain the interaction with the reference market related to Education Training and Employment of the TCLF Industries;
- To foster alliances within the TCLF Industries and also with related sectors (e.g. machinery manufacturers, chemical industry, distribution, etcetera.) in order to maximise synergies with them;
- To develop and promote an effective innovation policy, in keeping with sustainability and flexibility, to include technical research, technology transfers, vocational training, etc;
- To promote the image of a dynamic and forward-looking industry with public institutions, the media and economic decision-makers regarding Education Training and Employment of the TCLF Industries;
- To provide the members with relevant information

in Education Training and Employment of the TCLF Industries in order to facilitate decision-making;

This report represents the essential piece of sectoral intelligence, needed to implement concrete actions for the benefit of the TCLF industries in the fields of employment and training. To this aim, like in past years, one of the ISPs has taken the lead in data gathering and elaboration take into consideration also data coming from ISPs which became part of the ESSC during 2014. The following picture has been elaborated, in order to define the strategic framework in which the report has to be taken into consideration.



EXECUTIVE SUMMARY



PART 1 OF THE REPORT LEADING ISP: IVOC

The purpose of the first part of the report is to provide an analysis of the textile, clothing, leather and footwear (TCLF) sector, reporting on the performance of its component sub-sectors and identifying opportunities the sector affords.

We start with an overview of the employment and the trends in recent years.

Therefore we look at Eurostat and Cedefop figures, complemented with material provided and elaborated by the members of the Skills Council.

We are still not able to propose an optimistic picture for our industries.

Thus, we are indicating a further decline of jobs.

Yet realism should not blind us for the opportunities for our sector.

However, even in the most pessimistic scenarios, significant employment opportunities still remain.



PART 2 OF THE REPORT LEADING ISP: CREATIVE SKILLSET, SUPPORTED BY ONC

It analyses the impact on several representative occupations of a selection of drivers of Skills demand. It . The TCLF sector has in fact seen changes to its employment and structural composition in the recent past like no other. Being both a skilled labour intensive industry, subject to many economic and global pressures, as well as one whose products are constantly changing to satisfy consumer demand, this has meant it is susceptible to many drivers that influence sector requirements and the skills needed. Examples of the drivers identified within the and how they impact employment and skills are illustrated in the following table.

The impact of these drivers of employment and skills change has changed many of the skills needs within the sector. Occupations within the sector have had to evolve as the skills needed to conduct these have had to either adapt to the changing needs demanded of the sector or accentuating the emphasis on traditional craftsmanship as the quality and innovation of European design and manufacture is globally prized.

Using example occupations from the ESCO classification system (where 107 occupations have to date been mapped into this new taxonomy), the skills and competences required by workers and how they evolved due to the drivers of skills demand within the TCLF sector include the following:

Whilst these occupations are currently in demand and require very specific skills and competences to undertake them, the sector due to the rapid and continuing evolution and change, has also seen new occupations begin to emerge. Whilst these are in their infancy and their future direction is still to be decided, these have been the direct result of the changing technologies, global markets and consumer demands in which the TCLF sector competes.

In this respect, many of the new occupations identified as examples are at managerial, professional and associate professional level where many of the drivers on the sector require both harnessing and driving forward to the TCLF

DRIVER	EXAMPLES OF KEY DRIVERS	IMPACT
Regulation and Governance	Trade agreements liberalising trade access to and from European markets	Regulation and legislation have opened up the sector to non-EU competition and changed both the shape and size of the sector. As well as threats, these market forces also open up the sector to new possibilities.
Demographic and Population Change	The ageing workforce that currently exists within the TCLF sectors; the ageing population demographic as people live longer and healthier lives.	Within the EU, an ageing workforce brings the possibility of losing important tacit skills learnt through experience as people retire. New markets are opening up to cater for an ageing demographic across TCLF production such as health and comfort related manufacture.
Environmental Change	Positive view of corporate social responsibility from consumers, prices for raw materials such as cotton more volatile due to unpredictable weather and higher energy costs whilst leather scarcity is affected by changing global food consumption habits. Environmental policies also impacting materials and processes availability.	The TCLF sector is keen to promote its environmental credentials throughout the supply chain as consumer demand and the need to reduce costs become important for business. Issues of both supply and consumer awareness are also seeing research into new materials more prominent whilst new market opportunities are opening up in mature markets based on sustainable manufacture.
Economics and Globalisation	Increasing importance of non-clothing uses for textiles; Fashion perceived as a risky business by banks and other financial institutions; European focus on niche products; increasing global reach of products through e-commerce and multi-channelling which are fundamentally changing business models.	The TCLF sector has seen large swathes of the sector outsourced leading to innovation and movement into nice and specialist production. However, favourable economic and global forces are also now bringing back traditional manufacturing. E-commerce is seeing the development of global branding and adaptation of new flexible manufacturing models and systems across the production and supply chain to facilitate these demands of e-commerce.
Technological Change	Evolution and the increasing pace of this evolution within manufacturing techniques and materials such as automatic cutting systems, advances in IT supported product design and manufacture, and increasing robotisation of tasks; The rise of technical textiles; Growth of specialist manufacturing	The EU is now a world leader with Technical Textile production as scientific advancements continue to be made. Technological advancements in production techniques and supply chain management.
Values and Identities	Strength of training and education in the European TCLF sector; Low attractiveness of the sector for young people away from sought after and high profile design occupations; Difficulty attracting STEM graduates into fashion industry	Emphasis on the strength of European design to continue to innovate and offer high quality products to market coupled with the development of the luxury cluster. There is also a need to connect the brand with the consumer arising from this. Skills and training are vital in raising the sector image.
Consumer Demand	Increasing demand for personalisation and differentiation, Increased pace of change for fashions	Being able to keep up with demand is a huge undertaking, requiring designers with creative and innovative skills. Consumer demand also requires manufacturing materials and processes and logistics are able to meet this need within the time scales required.

OCCUPATIONAL GROUPING	EXAMPLE OCCUPATIONS	SKILLS REQUIREMENTS
Managers	Footwear Production Manager Textile Product Developer Leather Environmental Manager	Being able to understand the production frameworks the industry works within to ensure production meets the required standards and demands whilst utilising new innovations and techniques at the TCLFs industries disposal.
Professionals	Textile Laboratory Technician Footwear Quality Control Laboratory Technician Organisational and Methods Technician	Ensuring their area of expertise is able to drive forward innovation and ensure TCLF products meet the aims of the industry.
Associate Professionals	Clothing Product Designer Textile Technologist	European TCLF production is based on creativity and innovation. Professions within this grouping need to ensure these requirements are met to ensure consumer demands are satisfied whilst utilising the new technologies at their disposal.
Skilled Trades	Garment and Related Patternmaker and Cutter Weaver Knitter Leather Hand Cutting Operator	European TCLF manufacture is based on quality of production. These occupations are tasked with ensuring the high standards set within the industry are met whilst also working with new materials, designs and processes.
Machine Operatives	Pattern Making Machine Operator Sewing Machine Operator Leather Production Machine Operator	As with skilled trades, operatives need to manufacture to high quality utilising both existing and new equipment and techniques, ensuring competitive advantage of quality production is realised.
Elementary Occupations	Presser: garment and related materials (hand) Warehouse Operative	These occupations ensure products are handled, stored and distributed in a way that ensures they are ready for market



PART 3 OF THE REPORT LEADING ISP: OPCALIA

sectors advantage. However, the demands on skilled trades and operative occupations are also high to ensure new technologies are used to a high standard.

To ensure both current occupations and future ones which are emerging within the TCLF sectors, this will require the development and utilisation of the skills and education by industry, providers and stakeholder alike to ensure the TCLF sector can reach its growth potential and take advantage of the current opportunities available to the sector.

In continuity with what has been done during the first year of activities of the TCLF ESSC, the report aims at describing innovative tools, national and/or regional strategies, local initiatives, methods put in place by members of the council to monitor skills needs and address the question of skill mismatch and gaps, with particular reference to the ones identified according to the 7 drivers of change described above. In two years, 51 tools and methods were analysed and highlighted. These tools matched either business problems or macroeconomic issues at a European level. As the ESSC has managed to describe concrete experiences, the report also describes the conditions for successful transferability of national experiences.

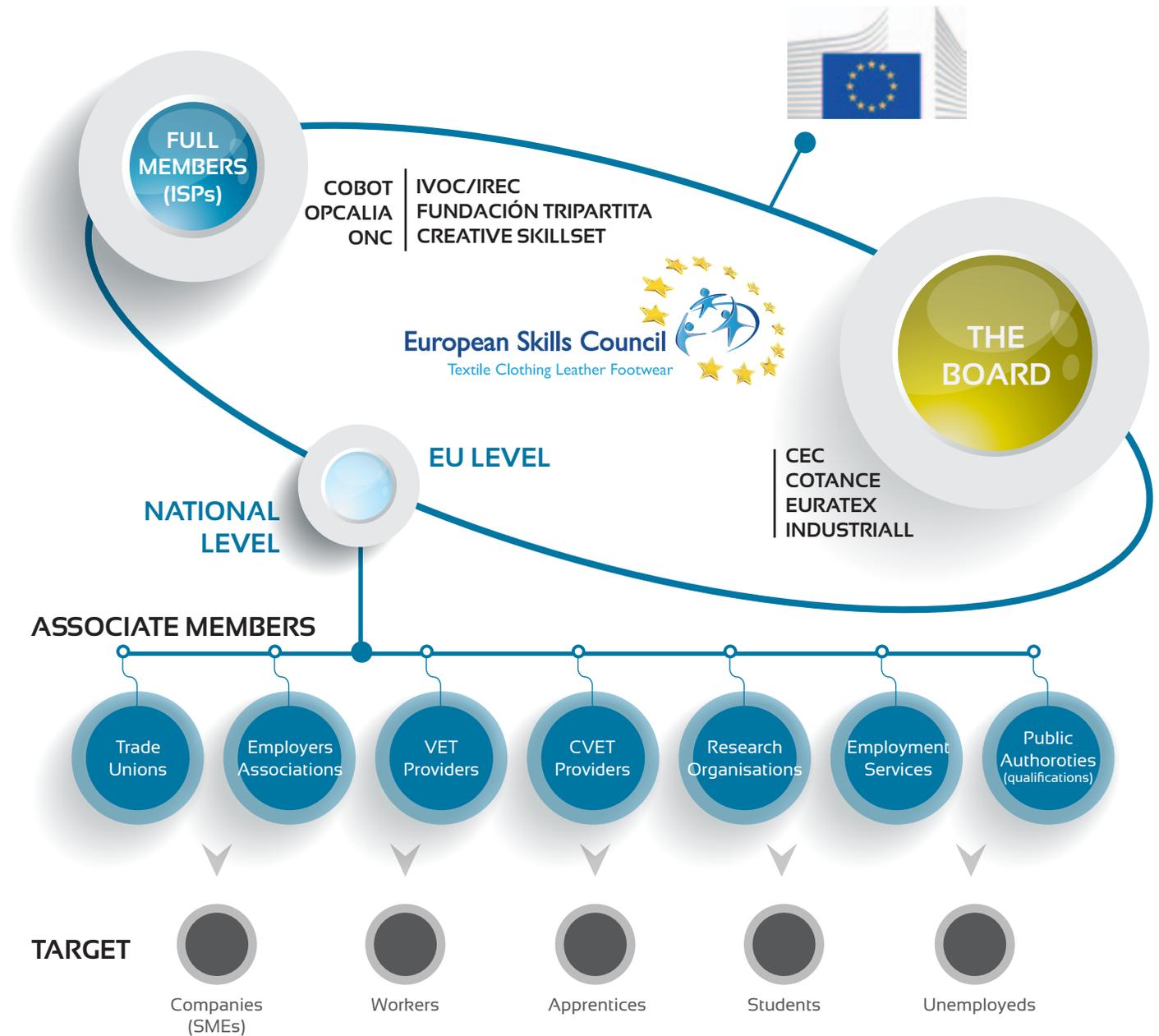
TCLF EUROPEAN SECTOR SKILLS COUNCIL RECOMMENDATIONS

During the first year of activities, the TCLF ESSC has issued a set of 7 recommendations, each of which has been addressed to a main stakeholder and to other actors, which were asked to provide specific support actions. The overall objective of this action was to provide the TCLF sector with strategies and tools aiming at improving the qualifications of the sectoral labour force, and at assisting enterprises to be more flexible in meeting changing competitive demands. A synthetic analysis of the issued recommendations is provided in the following figure.

ESSC members took concrete actions addressing several of these recommendations both at national and at EU level, some of which have been described in the previous sections of this report. In general, the TCLF ESSC considers that the recommendations, which were issued, are still valid, and constitute an adequate strategic background to start from.

Besides the intelligence produced when elaborating the report (as described above), the second year of functioning of the ESSC has brought important results in terms of the enhanced cooperation among member ISPs. Social partners have witnessed an intense and continuous transfer of information, insights, methods and materials from one to the other partner. Several examples are described in detail in this report (Part 4).

The current logical structure on the ESSC is described in the following figure and is mirrored in the statutes of the TCLF ESSC:



All the informative inputs coming from intelligence produced, past recommendations, current structure of the skills council, cooperation among ISPs have been discussed several times during the year, allowing the social partners and the other members of the ESSC to develop a deep understanding of the different issues identified. The final decision of the council has been to structure the 2014 recommendations as:

One “Structural Recommendation” that defines the conditions in which the ESSC can maximise its impact on sectoral Employment and Skills:

The future ESSC should:

- increase the sectoral and territorial representativeness of the ESSC, taking into consideration the territorial distribution of the TCLF manufacturing and the national peculiarities in terms of production, added value and resident knowledge
- implement and develop an efficient and harmonised system to collect and elaborate reliable data and information on employment and forecasting
- involve more actively different categories of national and regional stakeholders, essential for the implementation of concrete projects
- further develop cooperation and exchange of

good practices among its members

The European Commission should:

- support the TCL ESSC through adequate resources, while keeping its autonomy and ensuring its medium to long term stability
- foster the strategic complementary interaction between the ESSC and other initiatives on employment and skills (ESCO, EU Skills Panorama, European qualification framework, Sector Skills Alliances and Knowledge Alliances) and favour exchange of information on common long term objectives

4 prioritised actions to be implemented in the short-medium term by the ESSC, through specific projects at national and European level.

The ESSC shall exploit the sectoral intelligence developed and the established network of stakeholders to develop concrete projects aiming at:

- supporting the implementation of communication strategies toward the new generations, emphasising the career opportunities in the EU TCLF sector and attracting new skilled workers to the industry
- favouring the design and delivery of joint VET programmes, teaching and training methodologies, based on the evolving sectoral needs
- creating a framework for a rapid response to the current evolution in business models, processes and sales strategies, in terms of continuous training and competences provision
- developing a TCLF quality training certification scheme, on the basis of requirements already developed by national ISPs.

Coordinated by:



PART 1

The employment situation
of the sector including
forecasts and trends



INTRODUCTION TO PART 1

Anticipating skills needs and promoting co-operation between industry and vocational and educational training is considered one of the critical actions to be implemented in the coming years to ensure that the fashion and high-end industries remain important drivers of growth and employment in Europe. Moreover, Europe’s economy cannot survive in a sustainable way without a strong and profoundly reshaped industrial base (European Commission, 2014).

The partners of the European Sector Skills Council for Textile, Clothing, Leather and Footwear industries (TCLF ESSC) fully concur with this approach believing by working together at a sector substantial added value not least in identifying and offering possible solutions to the skills challenges of the sector can be made.

Within this part of the report, we are therefore looking to contribute to European policy and indicate why and how the social partners, based on their capabilities and priorities, can take action to shape the future of their industry.

This report is being written at a time when the European economy slowly rises from a recession and there are encouraging signs of revival within the TCLF sector.

However, we cannot yet draw completely optimistic conclusions from our analysis of employment within the TCLF sector, as it re-emerges from both the recession and the impact of globalisation over the previous decades. This however doesn’t alter the fact that our analysis is a basis for active employment policies for employers and trade unions in the sector, many of which have already been put into practice in several member countries today.

In this report, we analyse the evolution and structure of employment and skill needs in the textile, clothing, leather and footwear. From an industrial manufacturing point of view, the TCLF sector is composed of the following subsectors. Hereby, we refer to the European statistical classification of economic activities (NACE Revision 2) of these subsectors, to avoid confusion.

13 Manufacture of textiles	
13.1	Preparation and spinning of textile fibres
13.2	Weaving of textiles
13.3	Finishing of textiles
13.9	Manufacture of other textiles (e.g. knitted fabrics, carpets, non-wovens, technical textiles)
14 Manufacture of wearing apparel	
14.1	Manufacture of wearing apparel, except fur apparel
14.2	Manufacture of articles of fur
14.3	Manufacture of knitted and crocheted apparel
15 Manufacture of leather and related products	
15.1	Tanning & dressing of leather; manufacture of luggage, handbags, saddlery & harness; dressing & dyeing of fur
15.2	Manufacture of footwear

We look at TCLF figures for the whole of Europe where available, as well as focussing on the situation within the countries represented by the partner organisations of the TCLF ESSC. It is primarily within this context the situation of the partner organisations is reported as a starting point for on-going co-operation within the TCLF-ESSC.

When we look at the field of activity of the partner ISPs in the ESSC, we find that their activities in some cases do not correspond to that of the Eurostat categories. It is important to note and bear in mind during the reading of the report that some ISPs are also active in other (sub)-sectors relevant to the TCLF industries such as design (NACE 74.101), textile care (NACE 96.01), wholesale (NACE 46.16, 46.24, 46.41, 46.42) and retail (NACE 47.71). A number of issues with data collection must also be noted. For instance, there are a number of data sources available for the leather and footwear sectors, but these in cases refer to a selected group of countries given the concentration of industry in specific regions rather than at a pan-Europe level. Also, it must be noted that data may

relate to different years due to the data collection procedures within individual European member states. Where possible, the most recently available data is used.

This section of the report focuses on the evolution and structure of the employment for which, a number methodologies are possible and numerous parameters can be reported on.

To ensure consistency, we have opted to base our analysis on the skills Panorama Key Indicators (<http://euskills Panorama.cedefop.europa.eu/>), as proposed by CEDEFOP in 2012. We assume that these indicators are relevant to the European policy and thus can count on the interest from policy makers and social partners in this sense.

The various partners of the ESSC have examined these key indicators in a first phase of work in 2014. For the final analysis and reporting, a pragmatic selection of indicators submitted by ISPs and partners have been integrated into the report, based primarily on their relevance to the ISPs and

the social partners within the TCLF sector. The results of the analysis and the final selection that was made is presented in the appendix of this report.

THE EUROPEAN ECONOMIC SITUATION

The Eurostat and European Commission's, European Economic Forecast published in spring 2014 offers a number headline figures on the current macro-economic sector within the European Union and composite member states. Key messages include:

The economic outlook within the European Union (EU) seems to be improving. After the recession of 2008 and 2009, there are signs that a recovery is now taking place. In early 2014, confidence has begun to improve with various business indicators supporting a recovery scenario underway. GDP growth currently stands at 1.6% within the EU with growth is expected increase to 2% in 2015. All Member States are expected to register positive growth in 2015.

Indicators show, that growth is not predicted to be homogenous, with differences in economic performance expected amongst the largest economies. For instance, growth will be sustained in Germany while the recovery is expected to be more modest in Spain, France and Italy. In the UK,

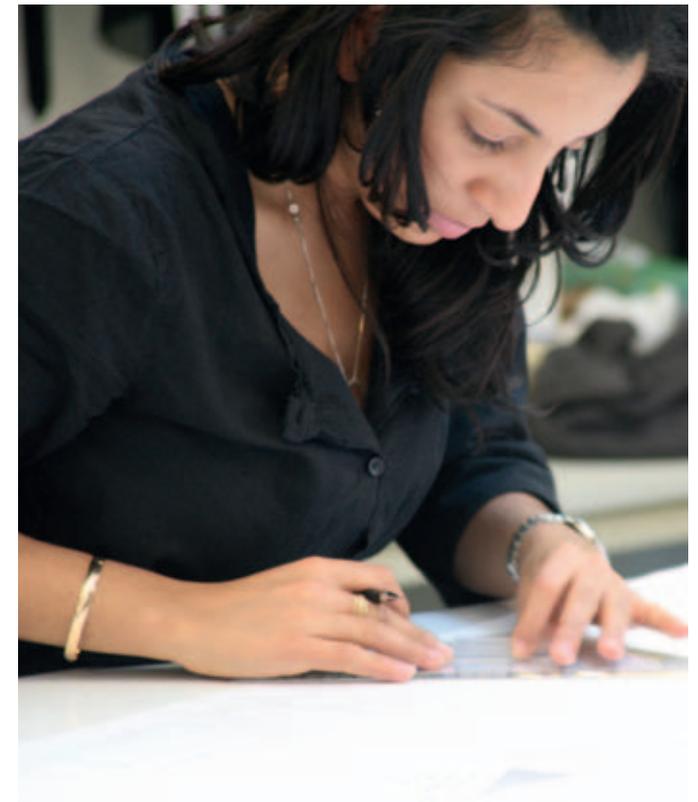
growth is becoming firmly established.

Another key message from the current statistics is that during the crisis period of 2008-2009, the main positive contribution to economic activity within the EU came from net exports. However, with the ongoing recovery, the characteristics are more self-sustaining in nature as domestic demand is continuing to strengthen.

Private consumption is expected to recover as confidence improves as labour market conditions permit, more specifically, we can observe that jobs are being created and wages increase. Indeed labour market conditions have already started to improve during the course of 2013 and unemployment should continue to decline gradually in most member states.

Net job creation is expected in the short term although in small measures. Employment growth within the EU in 2014 will be limited at 0.6% and predicted in 2015 to grow marginally more by 0.7%

Though differences in labour market performance will persist, unemployment is set to decrease in a large majority of Member States.



THE ECONOMIC SITUATION IN THE EUROPEAN TCLF SECTOR

To understand the current situation within the European TCLF sectors, the Euratex textiles and clothing in focus 2014 document offers a number of key messages.

In the wake of a general revival of EU-demand, in both consumption and the consumer confidence, the consumption of TCLF-products is estimated to have slightly increase by 0.2% in 2013. As a consequence, retail sales have turned positive. However, big discrepancies remain between member states with Eastern European and Baltic States performing better than most EU-15 countries. Also at a sub-sectoral level, manmade fibres and textiles are performing better than clothing.

Thanks to the upturn in world trade, figures for TCLF exports in 2013 from the EU are also continuing their revival, albeit more slowly than in previous years. Intra-EU exports went up by 2.5% in value with extra-EU exports also gaining further market shares. Sub-sectorally, clothing exports with a .3% increase is performing better than textiles which recorded a 0,1% increase in 2013.

In the first quarter of 2014, European textile and clothing production was 3% higher than the same quarter of 2013. Outputs and turnover increased in all sectors, although only marginally in clothing.

Between 2009 and 2013, extra-EU textile and clothing exports increased by 38% in value, and by 16% in volume (tons). However, signifying the continued reliance on European level consumption, intra-EU exports accounted for more than 70% of textile and clothing exports.. The main exporters are Italy, Germany, France, Spain, UK and Belgium who between them represent almost 80% of total EU exports of textile and clothing products.

Focussing on footwear, European footwear production has slightly increased since 2011. In 2013, it represented 4% of total worldwide footwear production by quantity, a 1% increase on 2011.

Better news come from footwear exports to third countries, which have increased by 48% in pairs and by 74% in value from 2009 to 2013. Furthermore, in terms of value, 9 European countries are among

the 15 main exporters in the world, by order: Italy, Belgium, Germany, Netherlands, Spain, France, Portugal, United Kingdom and Romania.

Intra-European trade is the largest component of international footwear trade, representing almost one third of worldwide exports, 31%.

Despite the revival of TCLF activities, supported by the improvement of many of the main short-term indicators, the situation of the EU employment remains challenging whereas managers' expectations worsened.

Nonetheless, Europe's economic recovery, which began in 2013, is expected to be confirmed in 2014 and 2015. This should positively impact consumer, business and financial market confidence which in turn should stimulate domestic demand of TCLF products. TCLF exports should also grow benefiting from strengthening global demand and increasing consumer spending power within these countries.

KEY FIGURES FOR THE TEXTILE AND CLOTHING INDUSTRY

The total EU-27 textile and clothing industry, including manmade fibres, did represent in 2013:

- ✓ Turnover of 166,500 million Euro of which: textile & manmade fibres represent 55% and clothing 45%
- ✓ Companies: 172,662 companies of which: textile & manmade fibres represent 31% and clothing 69%
- ✓ Employment: 1,664,000 workers of which: textile & manmade fibres represent 38% and clothing 62%
- ✓ Turnover per employee exceeded 100,000 Euro, and 2.5% of turnover was reinvested.

KEY FIGURES FOR THE LEATHER AND FOOTWEAR INDUSTRY

The leather and footwear industry, did represent in 2011:

- ✓ Turnover of 31,196 million Euro of which: tanning represents 25%, footwear 45% and leather goods 30%
- ✓ Companies: 24,185 companies of which: tanning represents 7%, footwear 49% and leather goods 44%
- ✓ Employment: 392,264 workers of which: tanning represents 9%, footwear 70% and leather goods 21%
- ✓ Turnover per employee reached nearly 80,000 Euro.

EVOLUTION OF THE EMPLOYMENT IN TCLF: LONG-TERM TREND

When we look at the employment situation since 2005, one could fear that the phasing out of the Agreement on Textiles and Clothing would negatively impact employment in the sectors. Today we cannot do anything else than to confirm our expectations. Employment continued to decline in all European countries following its phasing out which opened up the sector to global competition from low cost producers. Therefore, since 2005, approximately one third of all jobs in the Europe TCLF sectors were lost.

The situation has however, impacted the regions of Europe differently. It is noted there have been heavier employment losses in the new member states compared with the decline in the rest of Europe.

If we look at the situation in individual countries, it is clear that the developments are inconsistent. For example, between 2005 and 2012, Spain and Romania lost over the period half of their jobs in the clothing sector whilst Italy and Germany were able to limit the damage to 15%. In some countries, such

as Denmark and Ireland we note losses of around 80% of employment.

As for the textile sector, we can make a similar analysis. In countries with large textiles sectors, only Germany has seen employment losses of less than 20%.

Between 2005 and 2012, countries such as Bulgaria and Greece lost nearly 7 out of 10 jobs in the textile sector having been larger employing nations with Europe for TCLF sectors.

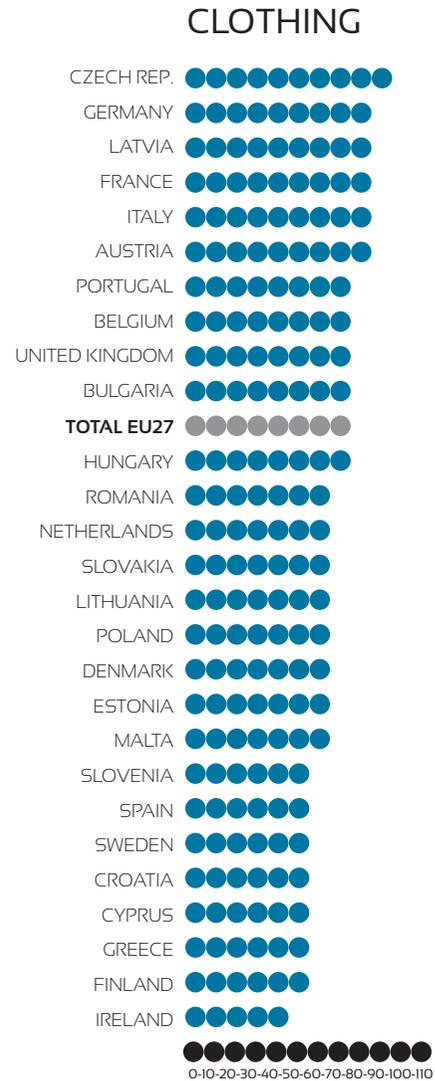
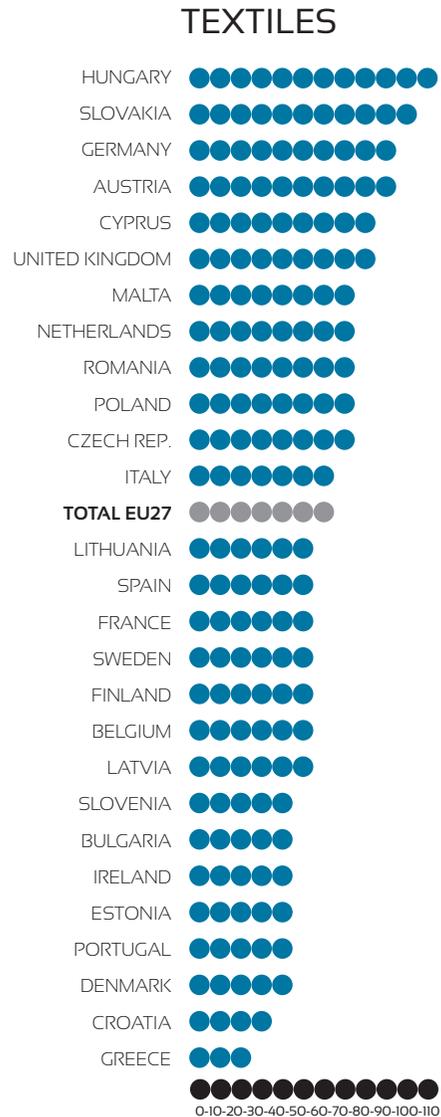
Certain figures give the impression that the employment losses in some countries are losing pace. The loss of jobs in the clothing sector in Sweden and Austria, for example, and in the textile sector in the Netherlands appears to have slowed significantly although the drivers behind these patterns are still to be confirmed.

Recent employment losses can be seen to be in line with the decline in previous decades. In that sense, of course, this creates a certain habituation

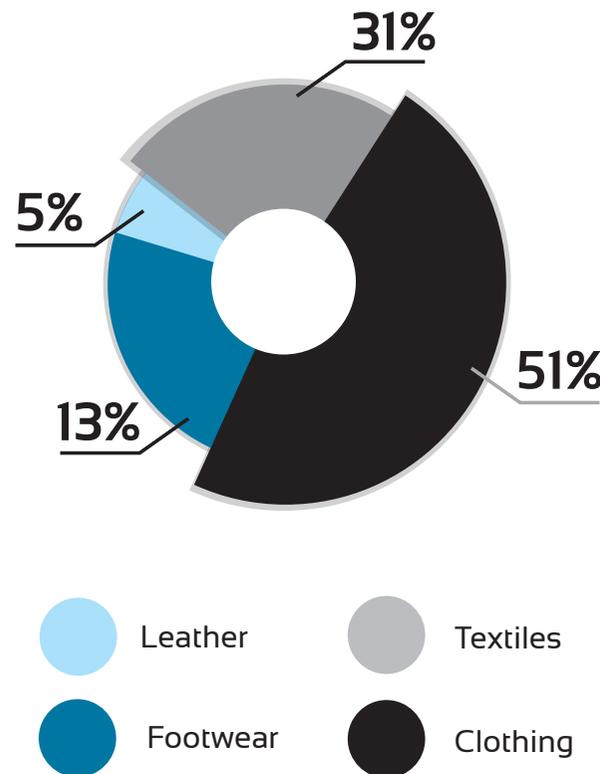
to the news about the situation in our sectors. But for every employee who loses his job, about 150,000 Europeans, each year, there is a similar need for replacement demand.

Figure 1

2012 EMPLOYMENT INDEX IN THE TCLF INDUSTRIES (2008=100)



TCLF EMPLOYMENT SHARE



The TCLF sector employs more than 2 million workers, of which 51% are in the clothing industry, 31% within textiles, 13% in the footwear industry and 5% in the leather sector.

Data in the above graphs are collected from Euratex, Cotance, CEC members and completed by estimates based on Eurostat data. However, it should be pointed out that Euratex, Cotance and CEC members data are in most cases selective due to the date being collected on a member basis and therefore different in coverage (companies' size, definition, etc.) to the overall TCLF picture.

Therefore, data in the above graphs and in the appendix require reading with caution as total EU figures should in theory capture the entire TCLF sector including, i.e. micro companies, countries data missing, etc... The tables in the appendix shows how reporting varies between countries and requires consideration. The restructuring of the textile and clothing sectors has been similar but not identical across the EU27. We can see that the situation in the NMS has not been much better than in the EU15. Former, hypotheses on a different development of employment in the old and new Europe are thus at least weakened. We recall the 2009 PROGRESS-report giving a rough sketch of

three different scenarios for the future of the TCLF-sector up to 2020. These are:

Scenario 1
“Globalisation Limited” sees considerable effects from climate change.

Rising environmental costs will change the system of global trade and set new priorities for consumers, governments and producers. TCLF industries will become more European or even regional under these conditions. Relocated production facilities will once again be relocated back to Europe. Even with continuing technical advances, skill needs will shift towards production and craft-related competences rather than to professionals.

Scenario 2
“Asian dominance – European excellence”

Assumes present trends to be reinforced. While environmental problems will be actively addressed, emerging countries will improve their specialisation

in industrial manufacturing and the EU will strengthen its technological leadership. Production activities will largely disappear from European TCLF industries but a great need for technical specialists and natural scientists will emerge.

Scenario 3
“Advanced New Member States”

Describes how the European Union and low-cost countries among the member states are going to defend the industrial basis in Europe. Facing the strongly negative effects of globalisation on manufacturing employment (not only in the TCLF sector), a comprehensive policy program aims to revive industrial jobs, which will reinforce the segmentation of skills needs in Europe: strong demand for production-related skills in low-cost countries and professionals in high-cost countries.

Five years after the publication of the PROGRESS report current information reveals too few indications pointing to either of the three scenarios. Yet, Creative Skillset points to the experiences in

the UK coming down to a mini-version of scenario 1 with a lot of higher end production returning where economical (driven by preproduction and logistics costs as well as consumer demand rather than environmental drivers) supported by economic and employment indicators showing the sector doing well and enjoying a rejuvenation.

Nevertheless, the evolution of employment would rather make us believe in the realisation of the second and thus the most pessimistic scenario. Primarily the problems in the new member states seem to cast doubt on the third scenario. Further investigation is required to check this hypothesis.

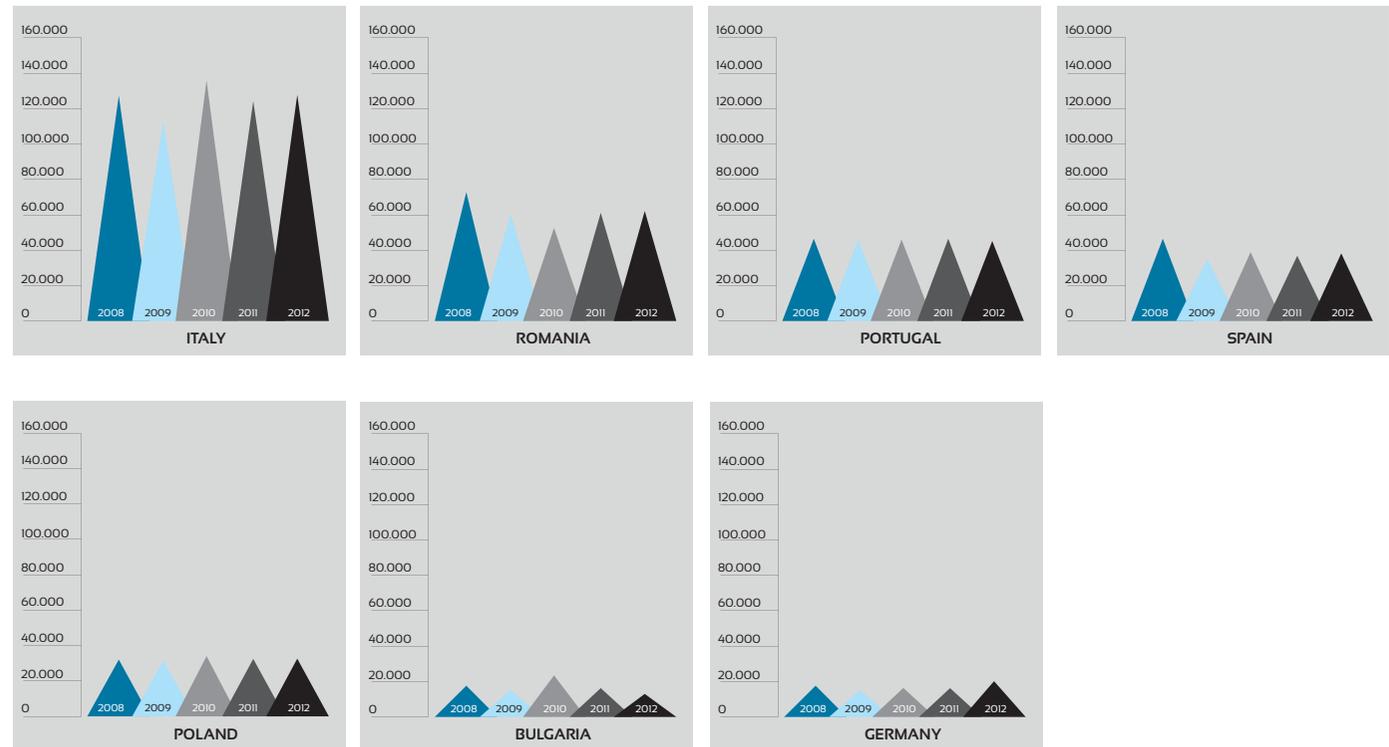
As mentioned previously, the available statistics on the **leather and footwear** sector are less complete than these on the textile and clothing sector.

The table in the annex contains the available Eurostat figures. The picture is clouded by a recent change in categorisation and registration. It is therefore difficult to give a reliable picture of the evolution of employment on the basis of this

Figure 2

2012 EMPLOYMENT EVOLUTION IN THE EU LEATHER AND FOOTWEAR INDUSTRIES (2008 - 2012)

material and interpretation is needed. The figures of the European employers' organisation COTANCE and CEC for the leather and footwear sectors reveal the recent evolution of employment within these sectors. The situation is clearly different from those in the textile and clothing sector. We get a much more stable picture and there has even been an increase in employment. This is the case for a selection of countries where leather makes up a proportionally larger part of employment in the leather and footwear sector. Italy by far remains the largest employer of leather and footwear workers within the EU.



Figures on tanning industry employment (part of the leather sector) are available from Italy, which has by far the biggest share (one third of all jobs) of the European leather and footwear industry and offers context to the sectoral picture. Figures from 2012 provided by the Italian OSSERVATORIO NAZIONALE CONCIA (ONC), partner ISP within the ESSC-TCLF, show that the tanning sector is composed of nearly 1.650 companies employing 33,791 workers. The trend in the last decade, following the pattern of production volume results, has been on the decrease for both elements with a 33% decline in the number of companies and a 41,5% decline of workers. The sector has traditionally mainly been composed of small and medium enterprises, but there are also a number of larger companies. The average size of an EU tanning company is currently 20 employees per company (before it was 16) and it is important to notice that in the year 2000 it was 23 with a continuous declining in the following years.

This trend seems to reveal that the winning strategy for the sector in the last decade can be summed up by the renowned sentence "Small is Beautiful". In other words, it appears that small and medium companies have given a better response to the big changes and challenges characterising the world leather and footwear market in the first ten years of the new century.

Looking at data related only to the footwear sector,

there were about 18,000 companies in 2012 in Europe, the majority SMEs, and almost 280,000 workers. Employment in the European footwear has stabilised with positive trends in certain countries.

A good example is Spain, where despite the high unemployment rate, the footwear sector registered an increase of 2,567 workers in December 2013 in comparison to December 2012 (a 6.8% increase). Most recent figures also show that from July 2013 to July 2014, there is an increase of 7,529 workers. The amount is indeed relevant, but it does not all represent job creation. Approximately 5,000 posts already existed, but were not previously included in NACE 152, because they related to professionals of the "manufacturing and repairing of handcrafted footwear" sector, which until 2014 followed their own collective agreement. Therefore, the real job creation from July 2013 to July 2014 corresponds to approximately 2,529 posts.

As a final comment and to correctly assess the employment evolution, we have to note that all employment figures relate to direct employment.

There are at least three elements that blur our image:

- Temporary employees who work in the TCLF sector do not always appear in employment statistics. About 65% of the newcomers in the

Belgian textile companies starts are temporary with the tendency to work with temporary workers strengthening.

- The same can be said of work that is outsourced to sub-contractors (e.g. transport, cleaning, maintenance or even IT.)
- Finally, we note an increasing privatisation within the sector with senior and middle managers of companies switching to self-employment and are therefore not included in the official employment figures.



PROSPECTS ON EMPLOYMENT: NO OPTIMISM, BUT YET UNDENIABLE

For a view at the employment prospects, we refer to an analysis of CEDEFOP (EU Skills Panorama 2014). CEDEFOP made a forecast from 2013 to 2025 for the TCLF sectors. They assume that future jobs are mainly driven by the need to replace the existing workforce as it leaves the sector. Net, therefore, there is a further loss of employment.

The main headlines of the report are:

- Sector employment is forecasted to decline by 13% from 2013 to 2025,
- Textile, leather and clothing will have a share of total employment in Europe of 0.93% in 2025.
- Textiles, leather and clothing will have a share of total European job openings of 0.59% in 2025.

Even with shrinking employment levels, the need to replace nearly one million workers forecasted to retire or to leave the sector for other reasons, means that about 600.000 job openings are anticipated across the EU-28 countries up to 2025.

In their analysis of future demand, CEDEFOP goes deeper than global figures. Supported by the hypothesis of altered changing structure of the labour market in our industry, they project demand numbers for various professional groups.

It was estimated that in 2013, just over a third of people employed in the TCLF sector were employed in craft and related occupations and just under a third were plant and machine operators and assemblers. Around one in ten people working in the sector were technician and associate professional occupations.

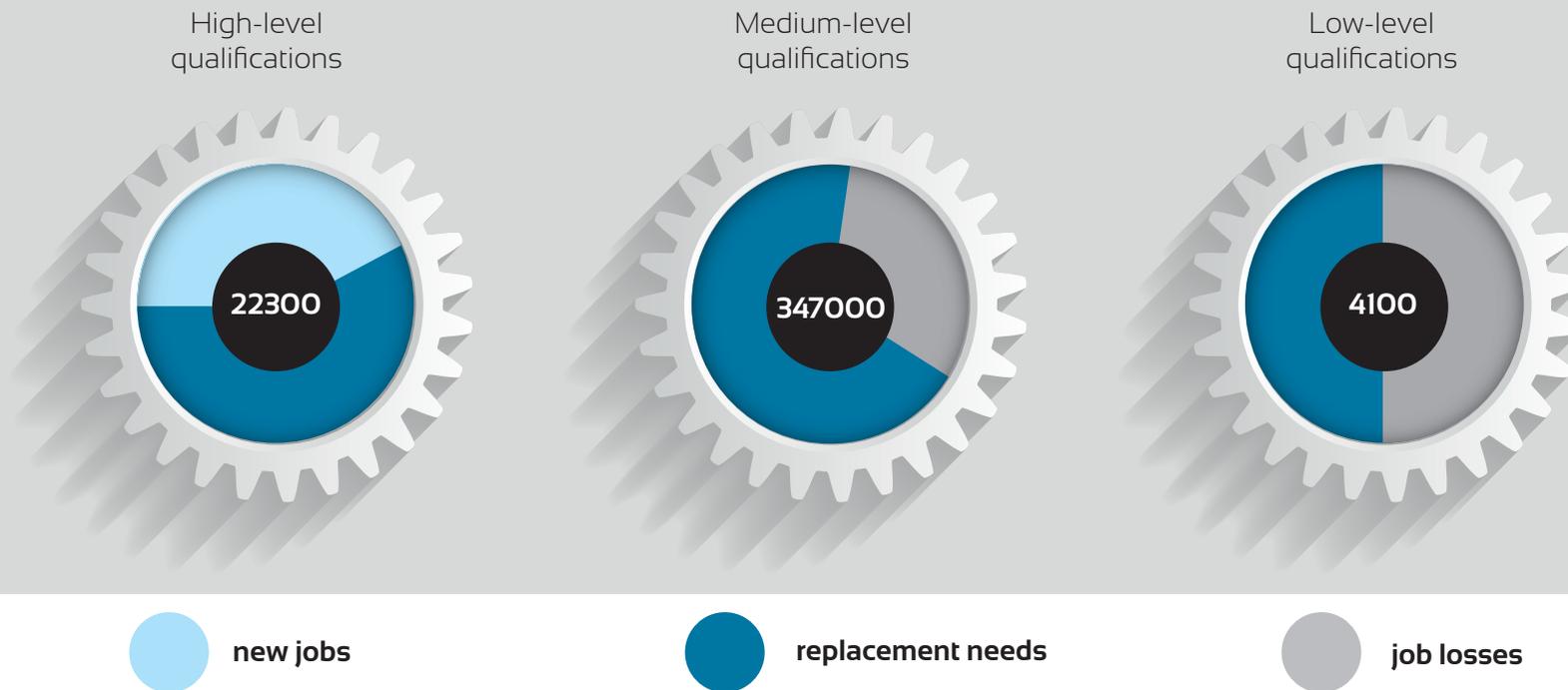
Using their forecasts, 300,000 of the existing craft jobs in the sector are forecasted to disappear by 2025, alongside around 100,000 of the plant and machine operator jobs. However, there is anticipated to be growth in the technician and associate professional occupational group, as well as among professional occupations and the currently small service and sales worker category.

As such, future job openings will mainly require

high- or medium-level qualifications, reflecting that the sector in the EU generally is moving towards high-value design and production techniques and illustrated in the following figure.

Figure 3

EXPECTED JOB OPENINGS IN THE TCLF SECTORS BY 2025



In this analysis, CEDEFOP also proposes a forecast for each individual country although we note CEDEFOP figures vary from different employment

figures than those of the ESSC. CEDEFOP assumes a total employment of nearly 2.5 million workers, whereas the ESSC figures are lower,

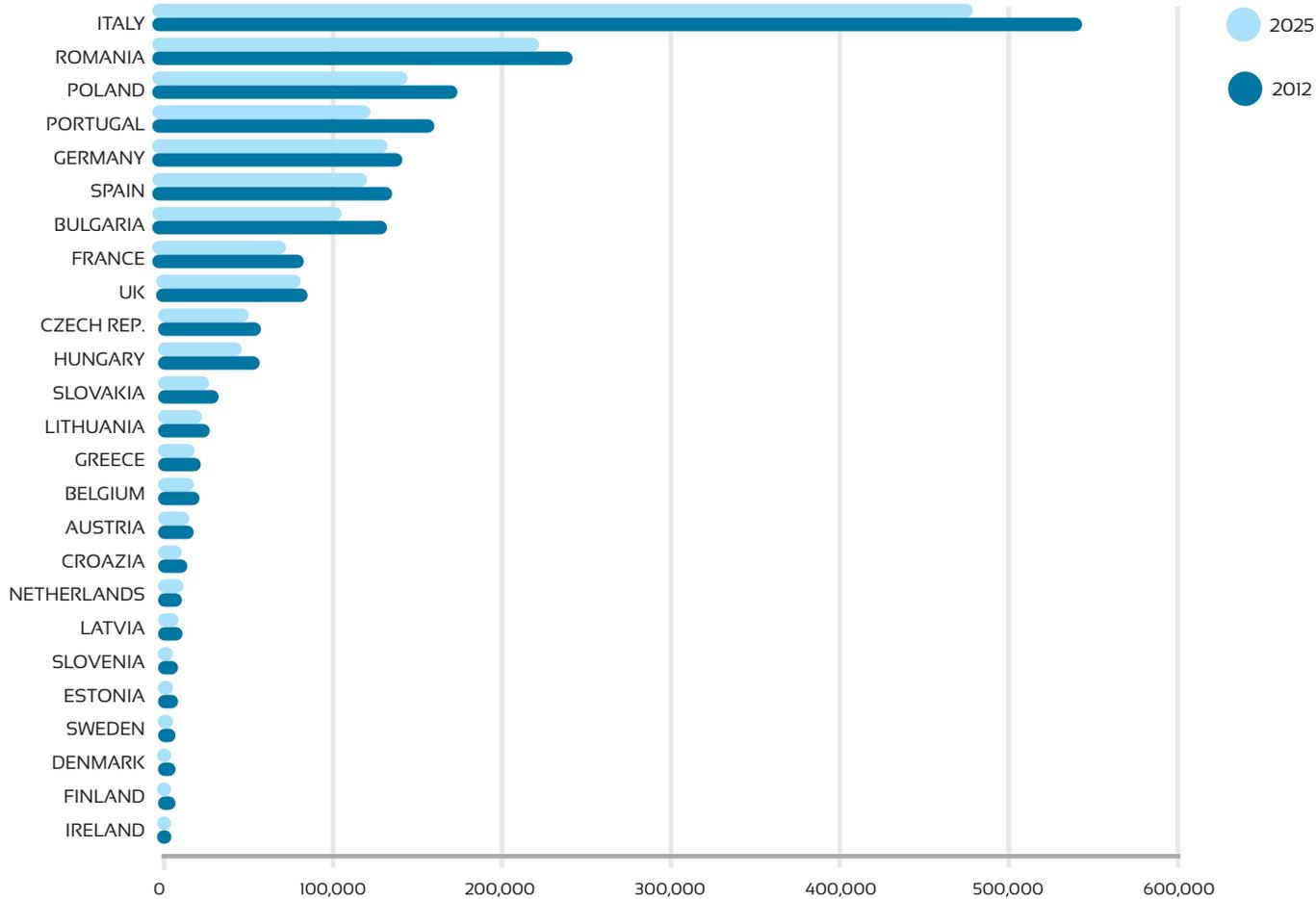
at about 2.1 million. Clearly categorisation and registration differences explain this situation as mentioned before.

Figure 4

ESTIMATED TCLF EMPLOYMENT IN EUROPE IN 2012 AND 2025

Figure 4 applies the CEDEFOP forecast percentages (increase or decrease) to the employment figures of the ESSC. This chart is in this sense consistent with the CEDEFOP hypotheses while a correction based on the ESSC estimates. Thus departing from our own estimates, a total employment of 1.8 million workers could be the predicted requirement by 2025.

We note that the employment losses over the period to 2025 (i.e. over 10 years) is significantly less dramatic than the loss during the past decade. Nevertheless, the main conclusion is a further decline in jobs in the coming years. Interestingly however, some countries are enjoying employment rises in 2013 and bucking the trend of the forecast. For instance in the UK figures from the Labour Force Survey shows that between 2012 and 2013, employment in the TCLF manufacturing sector grew by 14% as economic recovery, re-shoring, continued export growth and increasing domestic interest in UK manufacturing have driven demand for UK TCLF production.



Source: CEDEFOP

The CEDEFOP hypothesis is roughly endorsed in the sector by the outlook from a number of countries. In France, we take into account of a further decrease of 6% of employment in 2020, which is consistent with a loss of 14% by 2025.

A similar forecast comes from the Italian tanning industry. Given the trend over the last 10 years that strongly fluctuated, the sector is predicting a stable future with a slight decrease in the order of 3 to 4 percentage points maximum.

Concrete employment forecasts are delicate. Projections (the extension of past patterns) are available, but real forecasts are scarce. This is made difficult by the nature of TCLF manufacturing that has a number of drivers that effect employment demand within the sector, and which we will discover in part 2 of this report.

The analysis Tempera made for the Belgian textile industry remains in this area a valuable exception. We resume in this report and therefore, this study and the conclusions that are illustrative of

expectations on a broader scale.

In order to get a picture of the staff needs in the Flemish textile industry in the future, in 2010 an analysis of the employment was carried out, including the various challenges and opportunities for the sector.

The investigation showed that besides the production process, also the market orientation of companies seemed decisive and typical for the employment and competency expectations in the Flemish textile industry. A distinction was made between a supply- and a demand-driven market orientation.

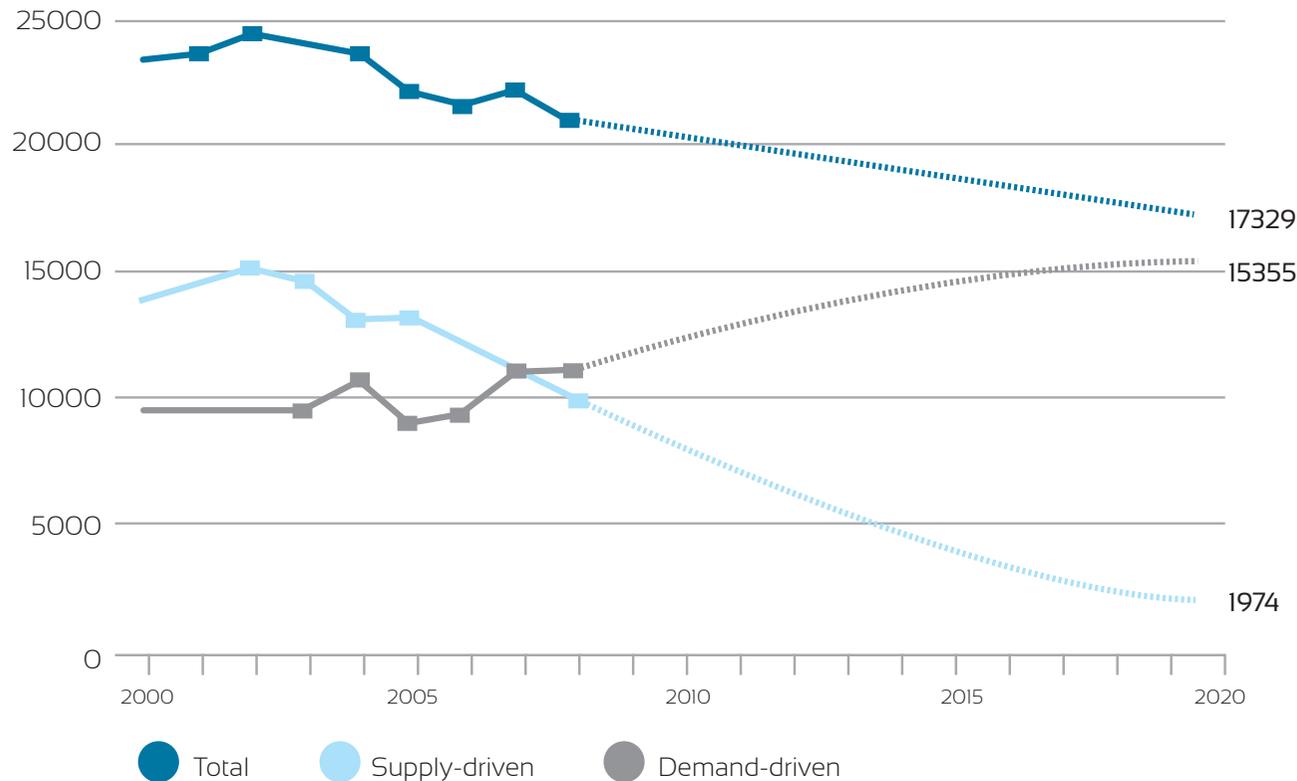
- Supply-driven: Companies targeting customers (standard product, lower added value)
- Demand-driven: Companies working in function of clients (customized production, higher added value)

The market orientation would mark the difference between the classical organisation of the sector

(supply-driven) and the new strategy that more and more companies are using (demand oriented). In this sense, the changing market orientation was put forward as one of the determinants of changes in the competency expectations of the employees. This is reflected among other things in the composition of the workforce and the features that it supports. This has been converted into forecasts for the future.

The first scenario assumes that the trends for the period 2005-2008 are set to continue until 2020. This means that the overall employment in the sector is shrinking annually by 2%, while the employment in demand-driven businesses continues to increase.

EMPLOYMENT TRENDS IN THE FLEMISH TEXTILE INDUSTRY



The forecast shows that a decline in total employment in the sector is yet accompanied by an increasing need for profiles that meet up to the expectations of demand-driven companies. Furthermore it also appears that in a contraction scenario of 2% per year, for certain processes even more jobs are required. Even in a more pessimistic scenario of 5% decline per year there still seem to be significant employment opportunities in the Flemish textile industry for key strategic processes.

Researchers assume that the textile sector in 2020 will however occupy 88% of the workers in demand-driven enterprises. Given the close relationship between the market orientation of companies and their competency needs, this finding is very important. The large shift in market orientation will bring along a parallel shift of the qualification needs within the sector.

COBOT, partner ISP in the ESC, specifies the transition from a supply-driven to a demand-driven sector with more niche production, there is certainly also future for qualified employees in R&D and sales.

THE SIGNIFICANCE OF THE SECTOR TO THE ECONOMY: SMALL YET UNIQUE OPPORTUNITIES

In our analysis of employment its evolution, we proposed the situation for the different countries. This approach is not optimal. The fact is in the working field of the partners of the ESSC-TCLF, one can see that a regional approach to the labour market situation in the respective sectors is important as clusters of employment are evident on a national basis.

- A study by Trends Business Research (2012) highlights the important areas for textile, clothing, leather and footwear manufacturing within the **UK**. The study found textile manufacturing employment is predominantly based around the North West, Yorkshire and Humber, the East Midlands and Scotland. Clothing manufacturing employment centres are London, the East Midlands and the North West whilst leather manufacturing is predominant within the East Midlands and the South West of England.
- In the **Italian** tanning industry, nearly 90% of all production is concentrated in a few manufacturing districts. The most important (50% of the output

and employment) lies in Veneto. The district with the greatest number of tanners is Tuscany with a specialism in bovine hides and calfskins. Campania in turn, specialises in sheep and goat leather. Combined these are the three most important regions for the leather sector.

- In **France**, the three most important employment areas in textile are situated in the north of France – Nord Pas de Calais (16% of the firms are in this area), Ile de France / Parisian area (18%) and the South East of France / Rhone Alpes with 22% of the firms. This last region is very active in the field concerning technical textiles. Most of the firms in the clothing subsector are situated in Ile de France (56% of employees), followed by Rhone Alpes (7% of employees) and in the Pays de la Loire region in the West of France (6%). Concerning footwear, firms are present in Ile de France (24% of the firms are situated there), Pays de la Loire (11%) and in the Aquitaine region in the south of France (10%). Finally, the firms in the leather sub-sector are mostly situated in the South West of France – Midi Pyrenees – with 34% of the firms, and 24% of

employment situated in the Parisian area.

- In **Spain** and following the 2014 official enterprise directory (DIRCE), TCLF industries are distributed in regions as follows: the textile industry is concentrated in Catalonia (29% of companies), Valencian region (23%) and Andalusia (11%); clothing manufacture is also mainly concentrated in Catalonia (28%), followed by the Madrid region (15%), Galicia (10%) and the Valencian region (10%). The tanning industry is mainly focussed in Andalusia (25% of companies), Valencia (22.5%) and Catalonia (16%). Finally, the footwear industry is heavily concentrated in the Valencian region, which stands for 68% of the companies.
- Finally, in **Belgium** the activity and the employment in TCLF is mainly situated in Flanders, which is the Dutch speaking part in the north of the country.

In this perspective, it would be better to have regional data, although we realise that this is far from evident. Indeed, by focusing on the regional location of the TCLF in Europe, and hence somewhat renouncing definitions on a national basis, we discover the real dimension and opportunities for the TCLF sector. It must be clear that the TCLF in an increasingly integrating Europe should be appraised in the first place as engines for development and for the future of regions.

Figure 6

Nevertheless, we should also look at the situation in the different European countries.

Even if the TCLF plays a modest role in the global European economy, the meaning of TCLF varies greatly from country to country. Consider the TCLF in the new Member States, but also in the EU15, the TCLF remains with various characteristics and specialisms (fashion, technical textiles, manufacturing, head-tail-structured companies, etc...) all playing a role in the economy and the labour market and being a potential driver of growth if industrial policy and the renaissance in European manufacture continues.

The TCLF for the European economy is quite limited in relation to the total active population. However, this proportion and significance increases when we compare the employment in the TCLF sector with the employment within national manufacturing bases.

SIGNIFICANCE OF THE TCLF SECTOR TO THE EUROPEAN ECONOMY (2012)

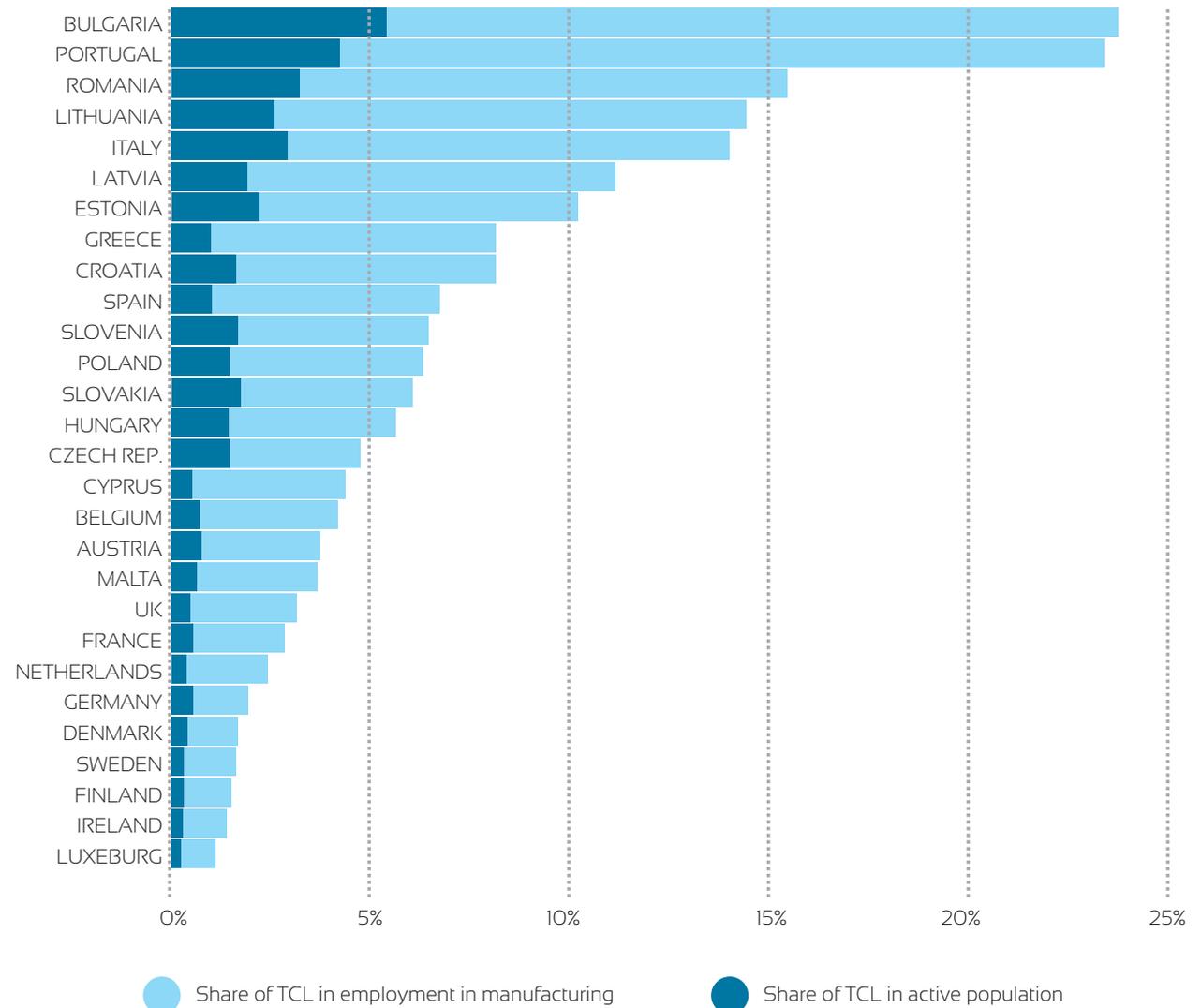


Figure 7

DISTRIBUTION OF TCLF EMPLOYMENT BY GENDER, 2013

We also see that the relative importance of the sector to the national economies can vary significantly. Whilst Bulgaria and Portugal have large proportional workforces, in half of the European countries, the share of TCLF industry is less than one job in twenty within the manufacturing sector.

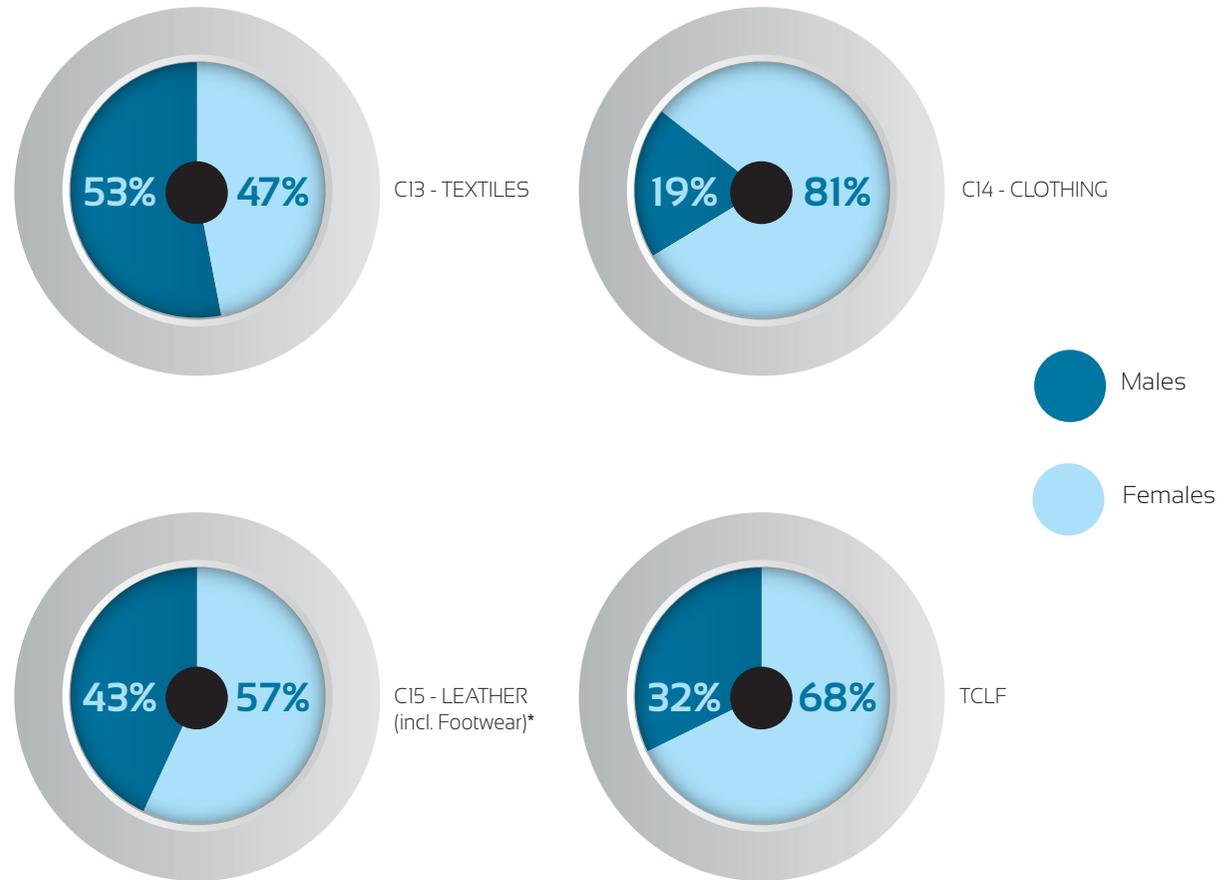
The relative contribution of the sector in national employment continues to fall. In the UK, the share, since the millennium, reduced to one-third, from 1.1% to 0.4%. This proportion is similar in France where it sets down a small 0.3%.

In southern Europe, the sector remains important (0.8% in Spain). Here too, however, the relative contribution of the sector has declined. In Spain, we also noted a decline similar to the UK (more than half in a decade).

Yet it is mainly the structural features, which indicate the significance of the TCLF for our economy, in particular the share of men and women employed, and of course, the ageing population.

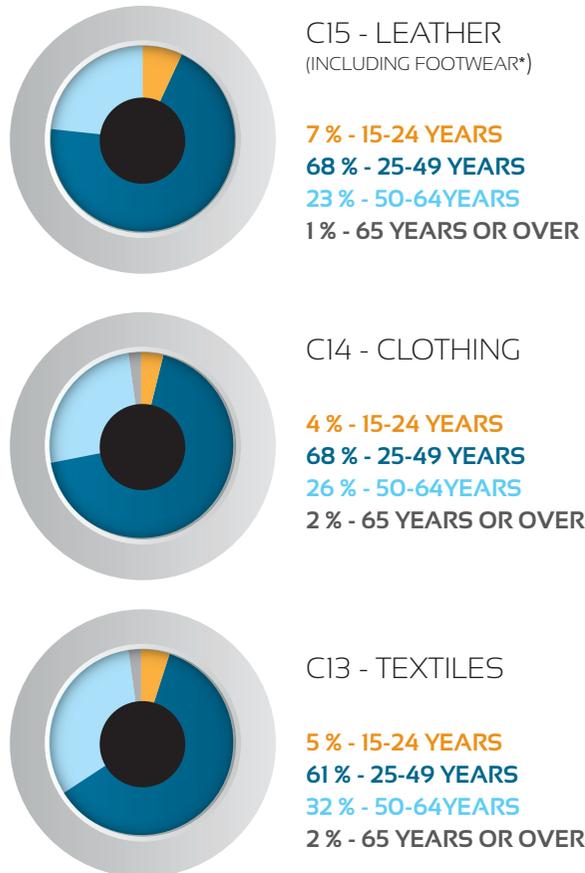
Especially in the clothing sector, there is a striking preponderance of women in employment, working as sewing machinists in particular.

If we consider the footwear sector separately from the leather sector, we can also notice that a majority of women is employed in all European countries. Indeed, The highest proportion of female are concentrated in the clothing industry, accounting for more than 80% of the total workforce. (source: Eurostat).



Source: Euratex based on Eurostat data, unit: 1000

DISTRIBUTION OF TCLF EMPLOYMENT BY AGE, 2013



The ageing of the sector is not a new phenomenon. There are predictions of this situation to continue as a combination of factors. Experienced staff with the skills needed for the sector to perform are reaching retirement age, while the sector is unable to encourage the next generation of workers to get into the sector or equip them with the skills required as the training infrastructure is re-established.

Currently the textile industry employs the highest share of employees over 50 years old, demonstrating a higher need for transfer knowledge compared to clothing, leather and footwear sectors. (source: Eurostat).

In the footwear sector, the age range in which the majority of workers are situated is in most cases between 36 and 55 years old, followed by the age group up to 35.

But the situation can vary quite strongly among the Member States:

- In the UK, 39% of the TCLF workforce is aged over 50. (Labour Force Survey, 2013)

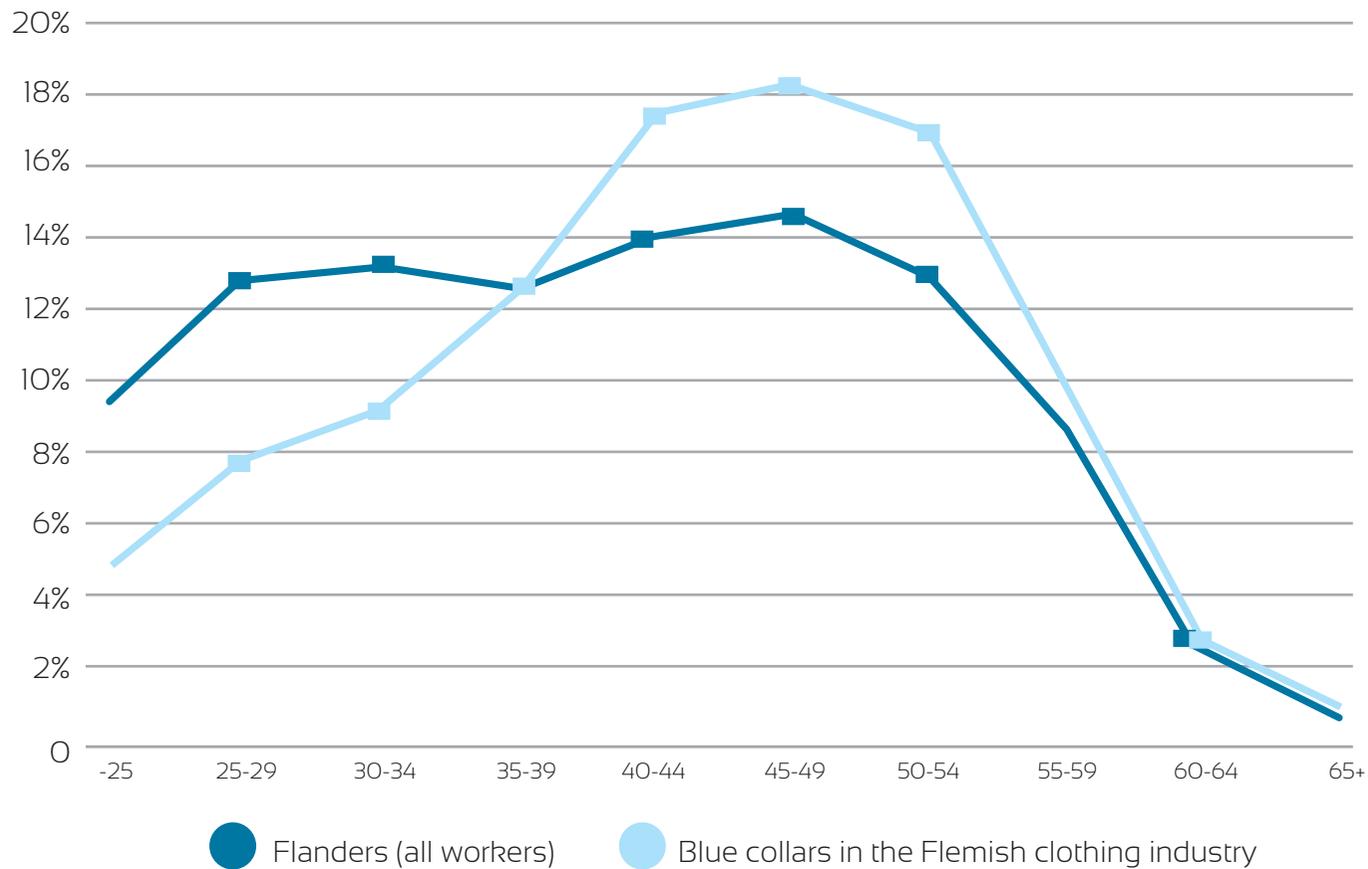
- Spanish figures confirm this rate. Across all sectors, the proportion of Spanish 50+ workers would hover around 25%.

- French figures again make clear that the ageing trend is a wider employment trend than just limited to the TCLF sector. Across all sectors, one notes in France an increasing ageing population.

- Belgian figures show that a distinction can be made between the blue and the white-collar workers. Ageing is stronger in the first group, and also rising faster. At the end of 2013, 28% of the Belgian textile workers were aged over 50 years. Some 16% of the production personnel in the Belgian clothing industry today is 55 or over, compared to nearly 9% for white collars. The proportions would continue to rise to about 20% of the production personnel in 2022. Note that this projection relates to 55+ workers (Neefs B. & W. Herremans, 2014)

Figure 9

DISTRIBUTION OF WORKERS BY CLASS AGE IN BELGIAN CLOTHING INDUSTRY, COMPARED TO ALL FLEMISH WORKERS (2011)



As to the interpretation of ageing population, much depends on the criterion used. If we look at the over 50 workforce, the situation in the Italian tanning industry is actually not too bad compared to the above figures. The over 50s account for 20% of the workforce. However, if we move the bar a little lower and include the age group to 46 years, the proportion of older workers in Italy doubles to almost 40% of the workforce.

A third structure characteristic is the diversity and the origin of the workers in particular. The diversity is visible, but if we look specifically at the proportion of non-nationals in the population, we cannot speak of a disproportionate representation. There is rather a local orientation, which in turn is related to the regional embedding of the TCLF. Regarding non-nationals, although in absolute terms there has been a decline in employment numbers, the share of non-UK nations within the UK workforce has continued to rise, today totalling about 16% of the workforce, up from 7% in 2000. Spanish figures are highly discontinuous and indicate a lower proportion (today around 5 or 6%). These percentages are lower than those for the overall Spanish economy.

More interpretation we get from the figures for the Italian tanning industry. The statistics concerning the employees' hometowns confirm the strong ties that the industry has with the community, where it acts as a driver of social and economic development. Indeed, 72.6% of the workforce comes from the same city or province of the given

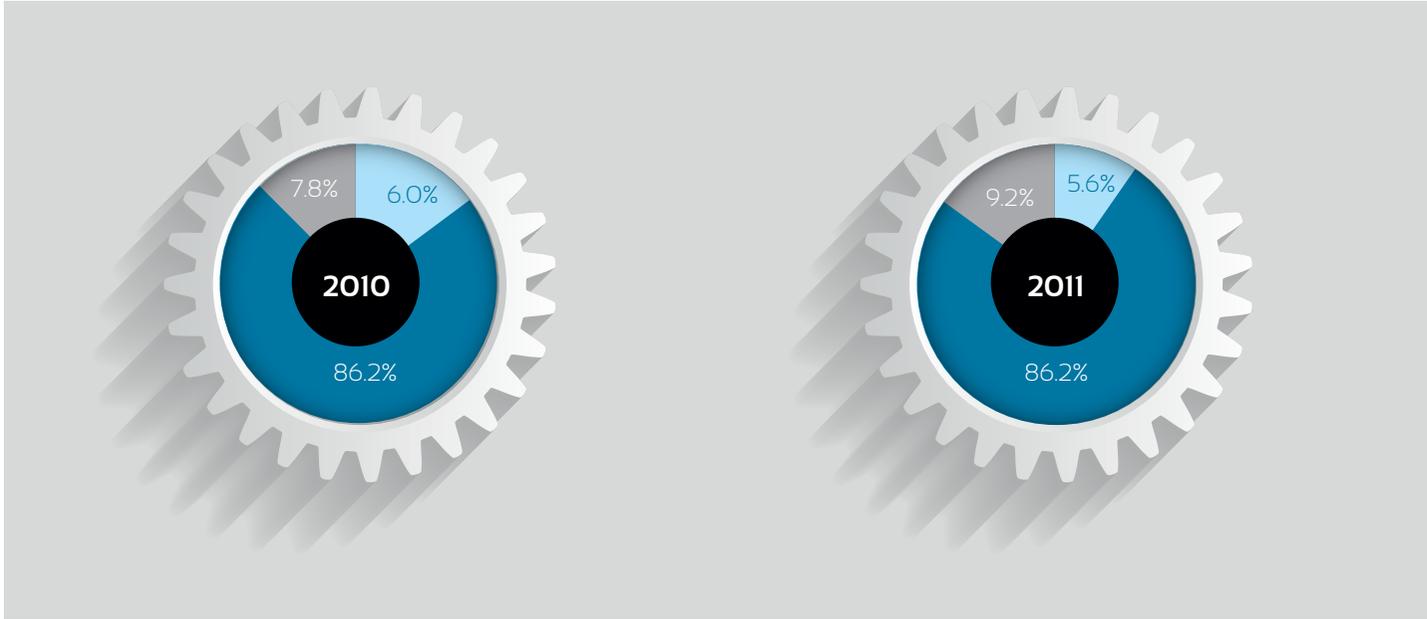
Figure 10

tannery district (In Tuscany, the district covers contiguous territory in both the provinces of Pisa and Florence).

The percentage of employees originating from outside the EU has fallen slightly (10.9%). The use of labour with non-EU origin varies markedly from one region to another (at about 30% in Veneto, roughly 7% in Tuscany and just over 2% in Campania and in the other regions) due to both the structure of the companies in each region and the availability of workers there. These Italian figures are illustrative of the situation in the wider, European tanning industry.

The same phenomena demonstrated in the tanning industry can be observed in the footwear sector, in which foreign nationals represent a very little percentage of the workforce in few European countries, while the majority of workers come from the clusters' areas, showing a strong link with the local territory. For example, in Italy, the main producing country in the footwear sector, the percentage of foreigners employed in 2012 represented 4.2% of the total workforce.

TERRITORIAL ORIGIN OF WORKERS OF THE EU TANNING INDUSTRY (2010 - 2011)



Nationals



Foreigners, EU countries



Foreigners, non EU countries

Source: COTANCE - INDUSTRIALL, 2012

SKILLS DEMAND AND IMBALANCES: LET'S REFRESH

This is the second report of the ESC. In 2012, a first report on the employment and skills needs was published. The analyses done two years ago are not outdated and remain relevant. The approach in this report is different from that of 2012, yet we want to resume the most important issues from the first report here, given its importance for the functioning of ISP.

In particular, we note:

- The development of the competencies of human resources is a credible and effective strategic response to the challenges in our sectors. The de-localisation of production to low-wage countries and the job losses that were the direct result of it, date from the time that only one response was available to the changing market conditions. If producing domestically becomes too expensive, then produce in a country with lower production costs. Today we see that the strategic responses to the challenges are much more sophisticated and differentiated.

Developing the competencies of the workforce has become credible and effective.

- Production related technical competencies stay central to recruitment needs, even in the countries which reduced production activities.

With different scenarios and strategies, new competencies and skills needs have appeared. The importance of logistics and commercial skills, for example are on the rise. Indeed, in many companies trade has taken the place of production.

Nonetheless, research shows that by far the most important question has to do with the acquisition of technical skills related to production.

- An examination of the developments of importance for the future competence and recruitment needs show that most companies mentioned technical progress and new technologies, but respondents also indicate they face challenges and opportunities specific to their own business or companies. Individual companies often follow their own course, also in terms of their HR-policies and the way they look to the future.
- Basic skills are among the priority areas of competences for our industries. Employers largely mention psychosocial elements, motivation, willingness to learn or accuracy when asked about their recruitment needs. This may link to the the

recruitment difficulties, the sector faces, but also the profile of the workforce.

As in all sectors, the workforce in the TCLF is far from homogeneous and it is particularly diverse. Cooperation between workers of different ages, abilities, backgrounds and cultures is an absolute must. The increased importance of teamwork and drivers such as the internationalisation of the sector means basic skills, such as communication skills, basic IT skills, and knowledge of the national language, have become indispensable for several categories of workers, also for production personnel.

Indeed, the basic competencies ensure the broad employability of workers not only within the company, but of course also beyond into other employment opportunities.

- Common threats in the policies and strategies of many companies are innovation and sustainability. The social partners consider them as key drivers in the future developments in the sector, in particular in job creation. Markets and opportunities are in constant change, the production and work organisation must be continuously adapted to market requirements. To be able to deal with these changes, flexibility and adaptability are necessary, at the same time pursuing sustainability, underpinned by either a long term vision or the consumer not expecting anything else.

1.8

The TCLF sector was once one of the major industrial sectors in Europe. The role the TCLF has played a large part in building our wealth should not be underestimated. After phasing out of mass production and employment, the share of the TCLF in many national economies declined. We find that today, the TCLF is looking for a new breath, credibility and thus credits on the labour market. Whereas in this context the various opportunities that we perceive are placed in the spotlight, are obvious.

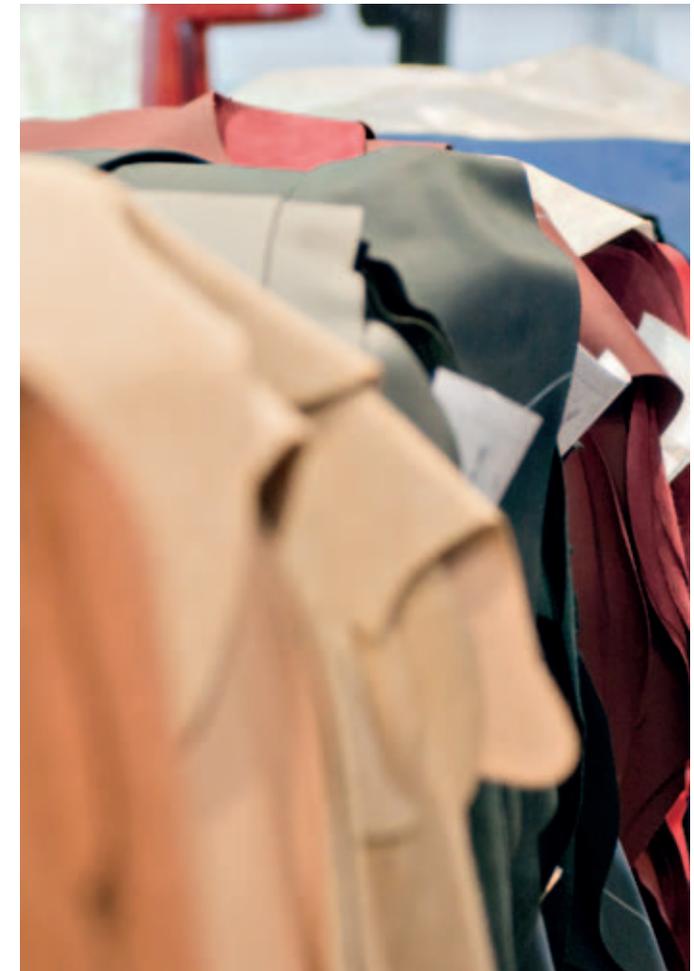
None of these hypotheses are generally valid, as it excludes conclusions for one country to be translated to the situation in other countries. Yet each hypothesis is supported by experiences on the field, indications that are also identified through research work. Thus the hypotheses are important because they form the basis of concrete operations, so the answer to questions from the field and the choices the social partners make.

SIGNIFICANCE OF THE TCLF SECTOR TO THE EUROPEAN ECONOMY (2012)

Earlier in this part of the report, we presented the forecast of CEDEFOP, which showed that future demand will be focused especially on highly qualified profiles. It sticks to an analysis of qualification levels. Below we look at the occupational evolutions within the sectors.

Despite the overall decline in employment, it can be established that demand is indeed increasing for certain professions. In the period 2010-2013 in the UK, it is the case for various occupations such as designers, weavers and knitters, tailors, dressmakers and sewing machinists. Creative Skillset adds that this analysis revolves around small numbers and that the analysis is disturbed in time by minor changes in the occupational categorisation.

Specific figures are also available from Spain. In addition to the sales staff at the top of the list, technical occupations dominate the list. Also, note the third position for shoemakers and thus the high demand in this relatively small subsector. Keep in mind an employment figure of 140,000 jobs in the Spanish TCLF.



TOP GROWTH OCCUPATIONS IN TCLF SECTOR IN SPAIN (BY NUMBERS OF RECENT RECRUITS)WORKERS (2011)

The situation in the Italian tanning industry is just as illustrative. The top list of occupations (by highest numbers of vacancies registered) is in fact dominated by technical professions, such as finishing operators, sampling colours operator, leather production machine operator, drum operator,

As in other manufacturing industries, the organisational structures of tanneries feature a high level of production-related workers within the sector(74.9%), although the level has declined slightly in 2012 as other mid-level positions - including office staff and production technicians - have increased to 22.6%. Management-level positions are limited at 2.5%, but are slowly on the rise, evidence that the industry is undergoing changes in organisational structure towards a greater use of skilled labour that will be able to face the new challenges of internationalisation and of the marketplace generally, including in terms of new products and of optimising business processes.

This trend also finds confirmation in the - even more significant - numbers on employee education, with those who have either a secondary school diploma or university degree going from 21.1% in 2007 (the year in which such data were first gathered) to 32.9% in 2012.

With a share of more than 50% of employment in the European tanning industry, the situation in Italy dominates Europe

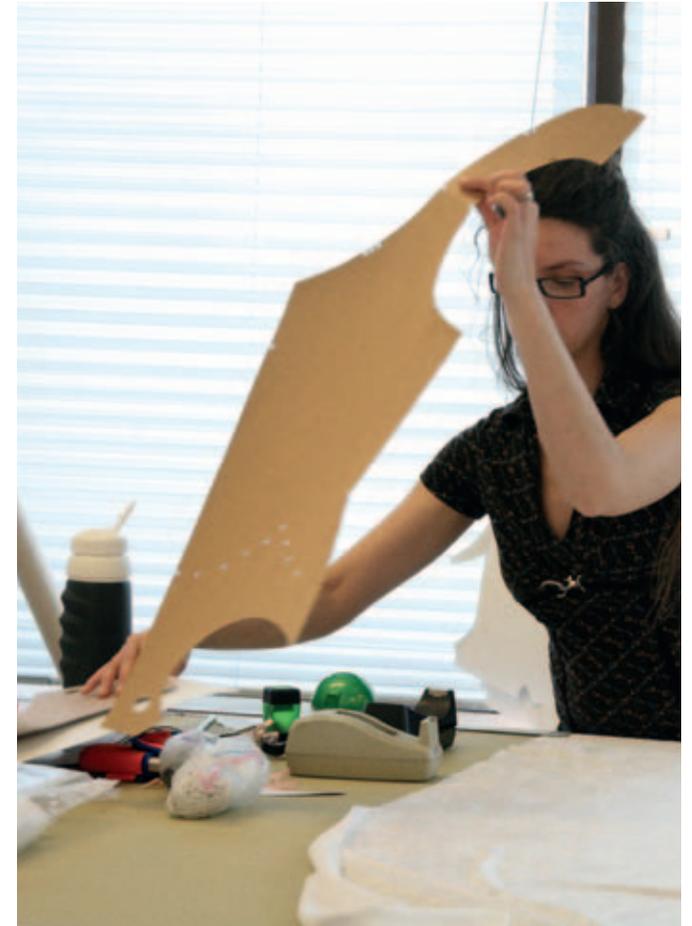



Table 1

Spain CNO 2011 classification	Growth occupations in the last two semesters	Employment contracts	Sectoral coverage: textile (T), clothing (C), tanning (L), footwear (F)
3510 Sales and purchasing agents and representatives	Yes	42.086	T,C,L,F
8209 Fitters and assemblers not elsewhere classified	Yes	32.749	T,C
7837 Shoemakers and related workers	Yes	11.069	F
8170 Washing and dry cleaning machine operators	Yes	5.185	L
7622 Printing process workers	Yes	5.056	T,C
8156 Leather footwear, luggage and glove manufacturing machine operators	Yes	4.572	T,C,F
8153 Sewing and embroidering machine operators	Yes	4.252	T,C
7834 Hand seamstresses, embroiderers and related workers	Yes	2.649	T,C
3209 Manufacturing supervisors	Yes	2.541	T,C,L,F
3326 Occupational risk prevention and environmental health technicians	Yes	2.535	L, F
8159 Textile product manufacturing machine operators not elsewhere classified	Yes	1.958	T,C,F
7618 Handicraft workers in textile, leather and related materials, fibre preparers and weavers with artisan looms or knits and related workers	Yes	1.399	T,C,F
8151 Fibre preparation, threading and winding machine operators	Yes	1.041	T,C
7835 Upholsterers and related workers	Yes	1.032	T,C
7836 Tanners and fur and leather preparers	Yes	820	L,F
8152 Weaving and knitting machine operators	Yes	761	T,C

Figure 11

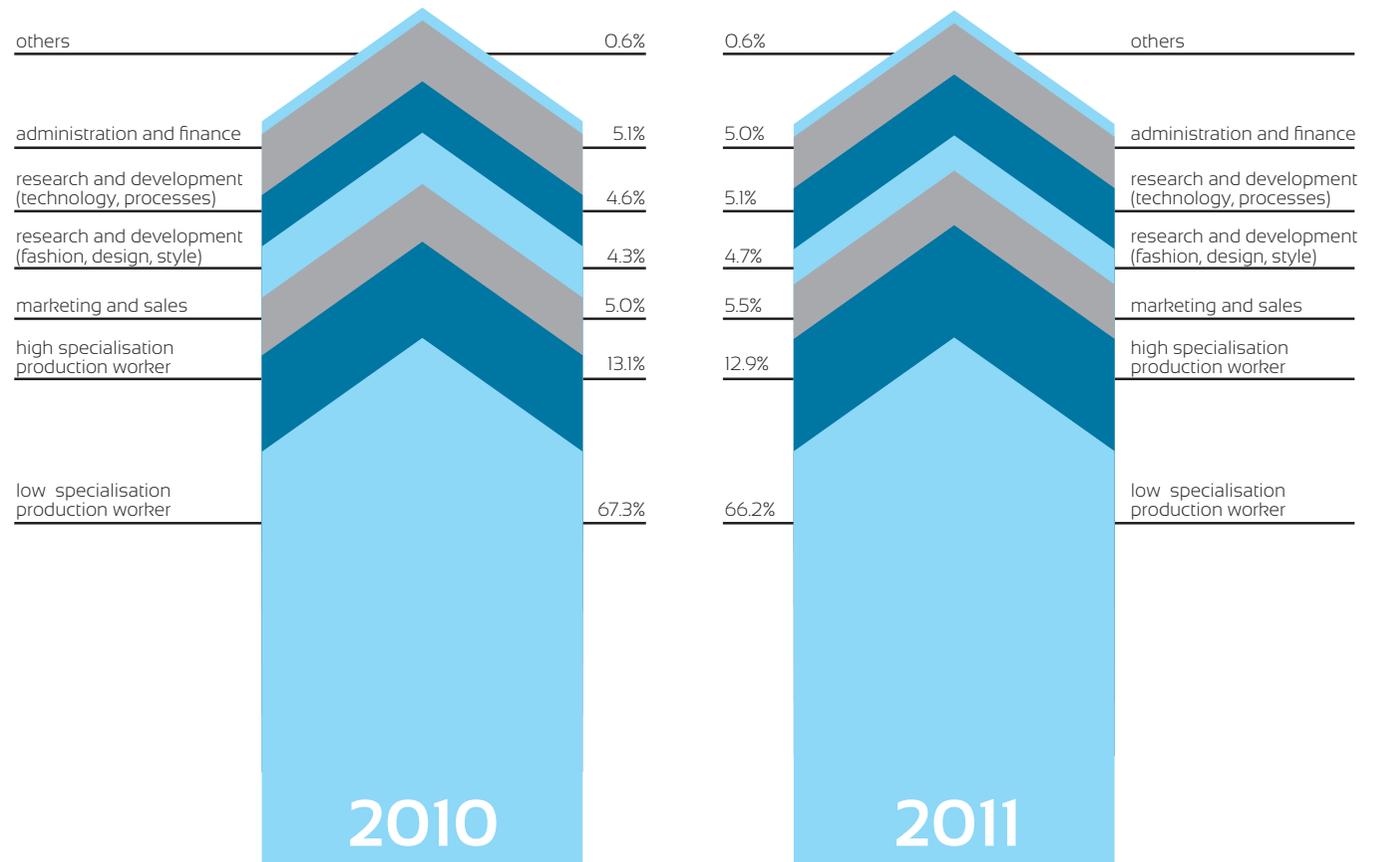
SHIFT IN JOB CATEGORIES 2010-2011 IN EUROPEAN TANNING INDUSTRY

The French *Pole Emploi* finally, presents an unambiguous top three for both the top growth occupations, top 10 occupations (by highest numbers of vacancies registered) as well as the occupations experiencing skill bottlenecks.

1. Machine operator
2. First level management and supervisors
3. Sellers and Buyers

Again we get the confirmation that the production technical competencies stay central in recruitment needs, even in the countries that repelled production activities massively until recently. The general trend is clearly double. On the one hand there are indeed signs for a certain upgrade to function at a higher level, yet the demand for technicians remains the most important.

JOB CATEGORIES



1.9


Table 2

ENTREPRENEURIAL SPIRIT AND COMMITMENT PERSIST

Along with the decline in employment, the number of enterprises in the TCLF in Europe has declined. Spanish and Italian figures illustrate this.

The general trend in Spain is negative and even rather sharp in 2012 (almost 6% fewer companies). However, the equally strong increase of entrepreneurs in the footwear industry in 2013 is striking. The share of shoe companies in the Spanish TCLF sectors has increased in four years from 16 to 20%.

For the Italian tanning industry we have to imagine a rather gloomy analysis again. The number of Italian tanning companies fell by 22% since the turn of the century, and in Europe, even by one third.

The decrease in the number of companies does not prevent that there are still starting entrepreneurs. Basically, the evolution of the number of companies is the result of companies that disappear on the one hand and starters on the other hand. Regarding starters, we are dealing with a double phenomenon. First, there are the entrepreneurs and potential new employers. Then there are the self-employed workforce.

NEW BUSINESSES WITHIN THE UK TCLF MANUFACTURING INDUSTRIES

2008	2009	2010	2011	2012
950	810	735	895	865

UK business growth figures based on official data show an optimistic message with 2011 and 2012 seeing the highest business creation levels for the TCLF manufacturing sector since the start of the recession in 2008. 895 businesses were created in 2011 with 865 businesses created in 2012.

In terms of the self-employed, the evolution is unmistakable, still in the UK. The numbers are increasing slightly, but the proportion of self-employed in the workforce has more than doubled since the millennium. In the UK, using labour force survey data, 8% of the workforce in 2000 were self-employed. Yet by 2013, this figure had increased to 21% of the workforce as niche start-ups and new business models evolved.

These figures fluctuate and show that an evolution from the past is not necessarily a good predictor of future developments.

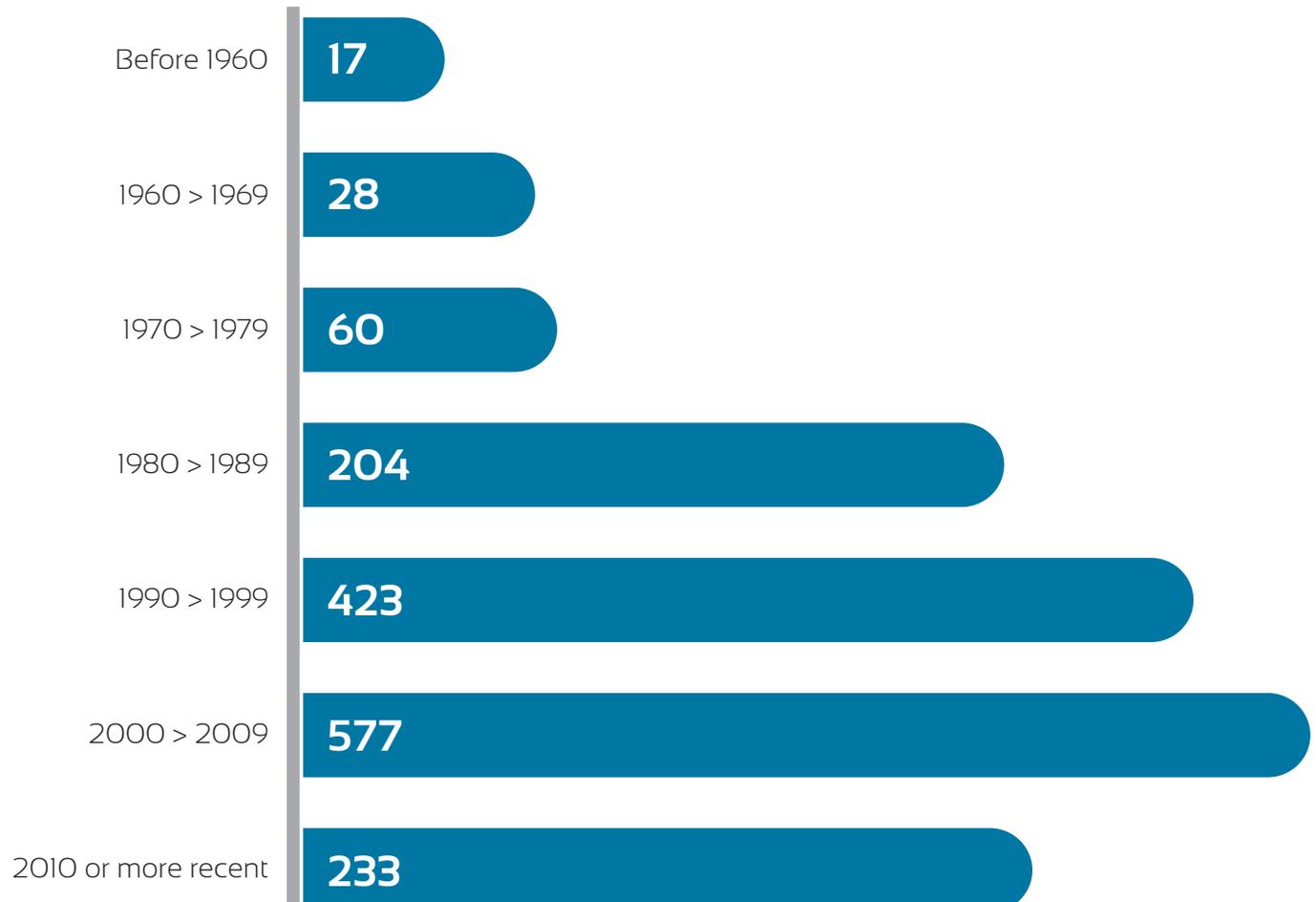
French figures of the “Observatoire des Métiers” seem to contradict the UK trend. In France, there is a decrease in the number of business start-ups by 30% over a period of 10 years.

Flanders, the Dutch speaking north of Belgium, is traditionally an important region for the clothing industry. Over the past decades, the clothing industry has undergone a makeover. The great mass producers of yesteryear had to make way for a pronounced landscape of SME's. The rejuvenation dynamics in the sector should not be underestimated. IVOC notes that, in addition to the disappearance of firms, new businesses are created. Flemish clothing companies are on average 14 years old. The graph below illustrates the establishment period of Flemish clothing companies. We note that more than half of the companies has started up this century. Given that the number of companies remains quite stable in recent years, we can estimate the turnover at around 5% of the companies per year.

Figure 12

PERIOD OF ESTABLISHMENT OF 1452 FLEMISH CLOTHING COMPANIES ACTIVE IN 2012

In other words, the sector remains attractive. We can see that among other things in education, where many young Flemings (currently over 2000) opt to take studies within a clothing related study. As long as entrepreneurs are enthusiastic to invest in our business and as long as people are interested in the jobs, we should support them with the best training.



1.10

TRAINING EFFORTS: STRATEGIC CHOICES CONFIRMED

Despite the job losses in the TCLF, the demand for motivated and versatile staff remains, to absorb the annual staff turnover. To counteract the competition, staff will however be multiskilled, as well as versatile and flexible around training demands. Certainly since the early 1990's it's clear that training in the TCLF industries gained more attention and especially the company training scores high. This training is provided by internal staff and takes place in the workplace itself. Employees are increasingly being trained in multiple skills in order to be able to work on different workstations. In periods of shortage, this allows production to continue.

Based on facts and figures we presented in the first report of the ESC, we argued that the development of the competencies within human resources is a credible and effective strategic response to the challenges of the sector.

However, training needs still require addressing. Depending on the source, the definition of training, the way training is registered and calculations that

are done, training figures may greatly vary and even contradict each other.

There is simply no good standard for this indicator. We noted that the national data of the ISPs are not comparable. There are too many differences in definition and registration.

Nevertheless, if we start from the lowest figures, currently about 10% of all TCLF employees follow some training annually.

The figure is confirmed already by Creative Skillset for the UK with 10% of employees reporting they had undertaken on-going vocational training. This figure has remained stable since the turn of the century.

The French CEREQ notes simultaneously a very slight annual increase of around 0.2% skilled workers for our sectors. Other ISPs give us a different picture and witness of a clear growth in training investment.

Developments in Spain are urgently needed. When we look at the training efforts of the past few years, we see a booming of training needs of the industries concerned. We note an increase of more than 50% of participants in the textile and clothing sector and more than a doubling in the footwear industry.

In addition to this strong growth, ESSC Spanish colleagues point to a clear decline in interest in the open training offers. Over a period of nearly a decade, the training activity is quasi eliminated, in the advantage of the demand-led training.

Figure 13

CHANGE IN EMPLOYEES PARTICIPATING IN DEMAND-LED VOCATIONAL TRAINING IN SPANISH TCLF SECTOR

In parallel with the participation of workers in training, there are also the employer aspect to consider. Again, data from one country is not necessarily comparable to those of other countries. However, we note:

- In the UK the UK Employer Skills Survey 2013 reports 46% of TCLF manufacturing employers funded or arranged training.

- French figures are somewhat lower, and hover around one in three.

Italian figures also show the importance of the distinction between small and large size companies. Training efforts in larger companies are clearly a lot higher than those in the SME and especially micro-enterprises, a finding that we can confirm for other European countries.

Moreover, this applies to all sectors. The OECD puts it clearly: Participation in training activities is 50% lower in SMEs than in large firms, especially

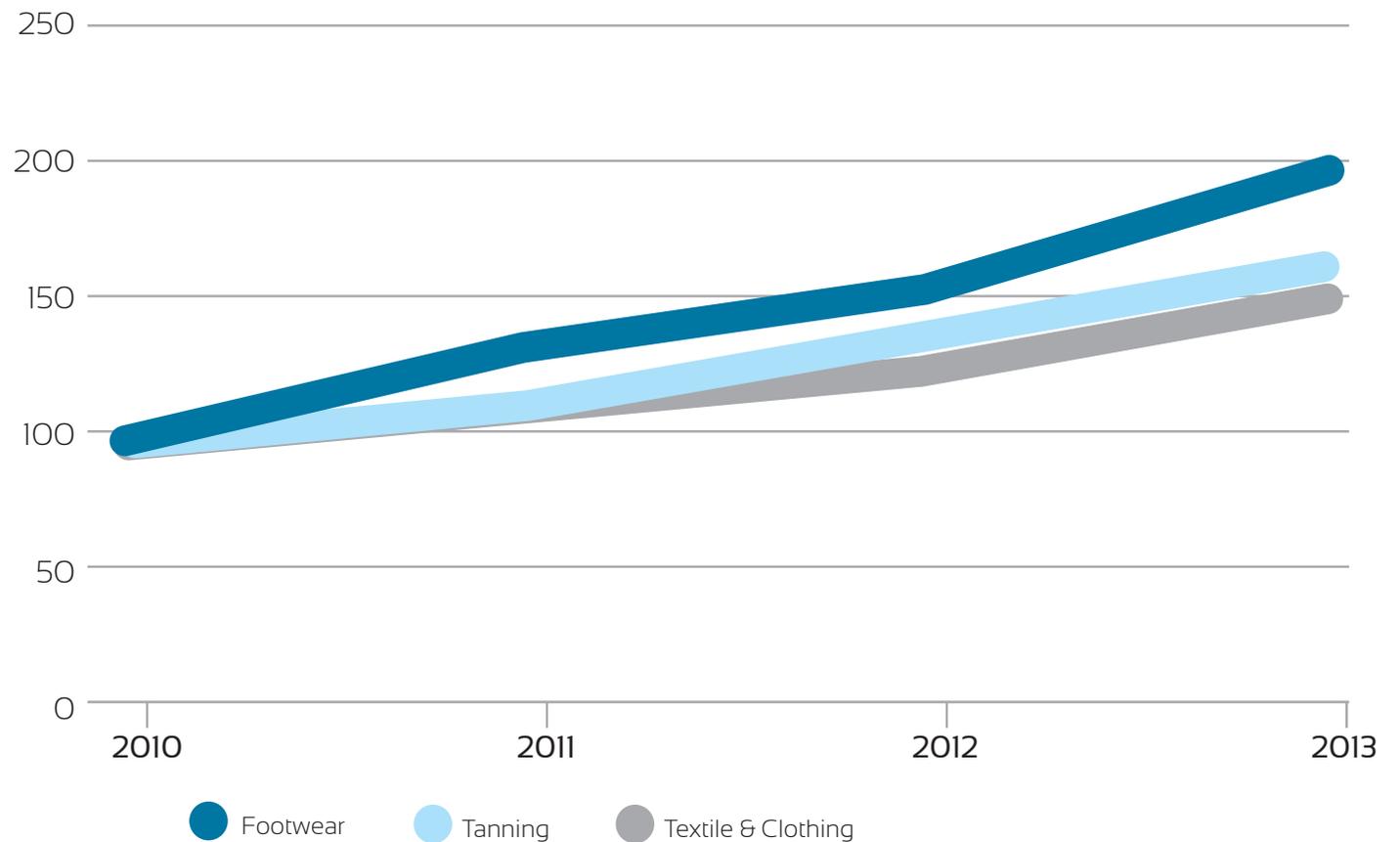


Table 3

EMPLOYEES IN TEXTILE, CLOTHING & LEATHER COMPANIES PARTICIPATING IN CVET COURSES

Company size	% of the employed
1-9	9.5%
10-49	11%
50-249	12%
250-499	24.9%
500 +	23.1%

 Source: ISFOL 2012

Table 4

EMPLOYERS IN TEXTILE, CLOTHING & LEATHER COMPANIES OFFERING TRAINING COURSES

Company size	% of the employed
1-9	12.3%
10-49	20.4%
50-249	35.6%
250-499	79.0%
500 +	73.3%

 Source: ISFOL 2012

because on-the-job training provided by SMEs is not conducted or if it is, not formally recognised (OECD, 2012). This brings us naturally to the previously mentioned problem of categorisation and registration of training efforts

RECRUITMENT: PARADOX OF NARROWING BOTTLENECKS

It is a paradox that in an industry that lost many jobs during the last years and decades, recruitment problems emerge. The solution appears to be obvious, given the large reserve on the labour market as a result of the many layoffs and company closures. Yet, in practice, it's not the case.

Many factors play a role. The image of the TCLF sector, mobility problems, willingness to work in shifts and, of course, skills mismatches are frequently mentioned.

Examining the case of the Belgian textile industry, the sector experienced a loss of jobs of totalling 64% in 13 years. The most common professions within these losses in the Belgian textile industry are weavers, maintenance technicians (mechanics, electricians) and shift supervisors (usually maintenance technicians who grew into a management positions).

These professions however also remain in shortage occupations, despite the fact that in the crisis period 2008-2013, the pressure on the labour market in

Belgium has decreased. Textile companies recruited less during that period, and sometimes found candidates (even for specific profiles) who had lost their jobs in another textile company.

It is difficult to present validated figures. Lot of the newcomers into the TCLF sector flow through public employment agencies or private recruitment agencies, while the vacancies for these workplaces are often not registered.

Also in other countries concrete figures are not available, but charts confirm that the major occupational category is about technical occupations. A top 5 list of shortage occupations from the Italian tanning industry illustrates:

- Leather production machine operator
- Finishing operation manager
- Processing department manager
- Spray finishing manager and sampling colours manager
- Hide & skins, semi-processed (wet - blue, crust) and Leathers grader

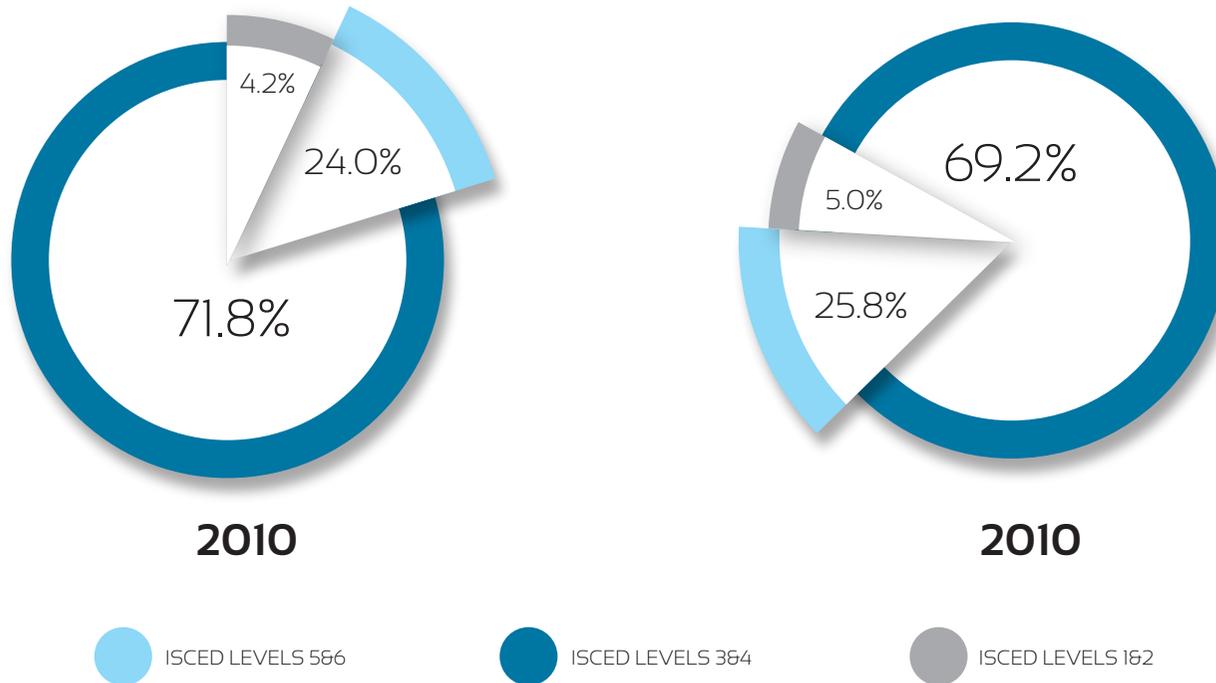
Even though there is a statistical basis for understanding shortage occupations, and the signals from the field are unmistakable, it should be emphasized that we are dealing with a subjective indicator when we analyse recruitment difficulties.

Yet there appears to be a clear worsening of the problem. In the UK, hard-to-fill vacancies reported by employers within the TCLF grew sharply from 2% in 2011 to 5% in 2013. In France, in 2012, this proportion is even twice as high. These large increase can be possibly put down to the growing demand for labour given the growth experienced, coupled with the continued issues associated with an ageing workforce reaching retirement age and difficulties attracting able young people into the sector.

A factor that certainly plays an important part is that the higher profiles are advancing in the workforce. In the Italian tanning industry, the share of university graduates almost doubled in five years. Along with the medium skilled workers today they make one-third of the workforce. European figures for this sub-sector seem to confirm the trend.

LEVELS OF EDUCATIONAL ATTAINMENT OF THE EMPLOYED IN THE EU TANNING INDUSTRY

Education levels in tanneries are more technical and production oriented



INTERNATIONAL STANDARD CLASSIFICATION OF EDUCATION

- LEVEL 1: primary education or first stage of basic education
- LEVEL 2: lower secondary or second stage of basic education
- LEVEL 3: (upper) secondary education
- LEVEL 4: post-secondary non-tertiary education
- LEVEL 5: first stage of tertiary education
- LEVEL 6: tertiary programmes leading to the award of an advanced research qualification, e.g.ph.d

CONCLUSIONS OF PART 1

Unfortunately, today we conclude that the rather pessimistic scenario for our sectors seem to become true, in particular for the textile and clothing sectors, as we see a certain stability in the leather and footwear industries.

The further decline in employment is worrying to both industry and policy makers.

The prospects are and remain bleak. Although, we must not generalise, as previously indicated, we get hopeful signs from the UK.

That does not mean that the social partners would not take their responsibility and seek answers to the challenges in these particularly difficult circumstances.

The conviction that the strengthening of human resources in the sector is a key to new perspectives is central to the sectoral policies.

The main conclusion should not interfere in recognising the opportunities, it is precisely in this field that the ISPs must play their role.

How this works, how ISPs are organised and what their outputs are, is the subject of the next parts in this report.





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PART 2

THE CHANGING FACE
OF OCCUPATIONS AND THE
EVOLUTION OF SKILLS REQUIRED
WITHIN THE EUROPEAN TCLF SECTOR



INTRODUCTION TO PART 2

The European Skills Council: Textiles Clothing Leather and Footwear (EU-TCLF) exists to address skills, training and human resource related activities on a European level. A key part of addressing sector need is to understand the drivers that are shaping skills and employment demands and with it how occupations are themselves evolving to meet this challenges and opportunities. Understanding this allows skills and training solutions to be developed that takes into account the requirements of the sector based on the changes the sector has been through.

Based on an initial methodology developed by Creative Skillset and with the feedback of the participating national ISPs and EU-TCLF partners, drivers of skills demand have been identified using the UK Commission for Employment and Skills (UKCES) drivers of skills demand model that categorises drivers that are shaping employment, skills and occupational change within the TCLF sector into seven groups.

The report then looks at how these drivers are influencing changes in skills requirements for occupations within the TCLF sectors. The recent European Skills, Competences, Qualifications and Occupations (ESCO) process has mapped 101 occupations along with their required skills and competencies for the textiles, clothing, leather and footwear sectors, providing a taxonomy that translates into this project. Selecting a number of occupations from this taxonomy and highlighting how skills are evolving in line with the drivers of skills and employment demand allows us to understand how occupations and skills are evolving within the TCLF sectors.

Finally, the report looks at what potential new occupations could look like within the EU-TCLF sectors, offering an insight in to how the skills and training system may need to be geared to catering to this next generation of careers as the sector continues its evolution.

2.2

Figure 15

THE EVOLUTION OF THE EU-TCLF SECTOR

DRIVERS OF CHANGE

As we have seen in the first part of the report, the TCLF sector in Europe has undergone vast changes in the recent past. These changes within the sector have impacted both employment and skills needs with fundamental repercussions on occupational requirements.

To understand the TCLF manufacturing industries and how employment, skills and occupations are evolving, it is important to understand the various drivers of employment and skills that are influencing and shaping the sector along with their magnitude and sectoral impact.

The following diagram, relevant to all sectors, sets out a core set of seven drivers of change to categorise these drivers as referenced within the UKCES' National Strategic Skills Audit evidence report.¹



¹ See <http://www.ukces.org.uk/ourwork/nssa> for further discussion of drivers. The descriptors for each of driver definitions is also from UKCES standard definitions.

Source: National Strategic Skills Audit 2010, UKCES

REGULATION AND GOVERNANCE

Using this model as a template, it is possible to categorise the drivers that are currently influencing the TCLF manufacturing industries and how they are influencing employment and skills change within these sectors. The drivers presented below were originally based on Creative Skillset industry consultations² that have been fully reported on and refined by partners within the TCLF-ESSC. This enables the reporting to account for the sector as a whole within Europe and how these drivers influence occupational change later in the piece.

The drivers have been structured within their seven key areas and the magnitude of which they are influencing employment, skills and ultimately occupational evolution within the sector.

They are coded specifically to reflect this.

Driver of high importance to the TCLF sector

Driver of importance to the TCLF sector

Driver of some importance to the TCLF sector

REGULATION AND MULTI-LEVEL GOVERNANCE:

covering management of borders between states, threats to (inter)national security, changes in global power, national and international conflict, and domestic regulation. Regulation can have an important influence on skills supply because it may affect labour supply through controlling entry to, and exit from, education and the labour market, and can influence skills demands through setting of either training, product or service standards.

The TCLF industries in Europe are labour intensive and sensitive to a number of variables such as material and energy prices, labour costs and competition rules. These all dictate patterns of production and the types of production within the sector and in many cases relate to regulation and governance at national, EU and global levels. Within an EU context, the major drivers identified are:

Driver	Sectors effected
<p>TRADE AGREEMENTS LIBERALISING TRADE ACCESS TO AND FROM EUROPEAN MARKETS</p> <p>Trade agreements are continually liberalising access to European markets from low wage manufacturing countries and have greatly affected TCLF manufacturing in Europe where these highly labour intensive industries are susceptible to outsourcing. For instance, the end of the Multi-Fibre Agreement in 2005 that had previously restricted imports into the EU. The non-conclusion of the Doha round of trade negotiations have not provided improved market access for European companies but this was replaced by a bilateral policy (Free Trade Agreements) that is slowly delivering better market access. Unfortunately, political decisions have impacted companies efforts to compete negative (e.g. Council and European Parliament vote for GSP+ status to Pakistan). However, the effective enforcement of trade rules remains an on-going concern to European member states within the TCLF sector, with access to raw materials (in the wider sense) becoming a prominent issue.</p>	<ul style="list-style-type: none">  Textiles  Clothing  Leather  Footwear
<p>INTELLECTUAL PROPERTY RIGHTS</p> <p>The design led goods produced by the TCLF sectors in Europe with their desirability and price, has meant the TCLF manufacturing sector has been impacted by counterfeit merchandise flooding markets globally. Whilst a number of policies and laws have been adopted to tackle this issue and help companies protect their designs, it is one that continues to persist.</p>	<ul style="list-style-type: none">  Textiles  Clothing  Leather  Footwear

Driver

Sectors effected

RISE IN LIVING STANDARDS IN PREVIOUS LOW WAGE TCLF MANUFACTURING COUNTRIES.

Countries such as China are experiencing large scale wage inflation as living standards and domestic consumption rise. For instance, figures indicate wages in China grew 14 per cent in 2012. Whilst many manufacturers respond to this by seeking to move production to lower waged countries, the cost of manufacturing overseas remains progressively more expensive and erodes many of the economic arguments to maintain long overseas supply chains. These issues also can be seen in the context of greater human resource management and validation of the labour being used which further professionalises the image of the sector for those still outsourcing.

-  Textiles
-  Clothing
-  Leather
-  Footwear

EUROPEAN POLICY FOCUS ON PROMOTING AND ASSISTING TCLF MANUFACTURING

The fashion and textiles sector has been identified as a sector that can deliver economic growth, high quality jobs and be a symbol of European creativeness on a global scale. This importance has been illustrated by both the EU Commissions action plan for the European Fashion industry³ and the European Industrial Renaissance. These policies to restore manufacturing employment in Europe based on innovation, access to markets and further measures against counterfeiting are developing and could be positive drivers for the TCLF sectors.⁴

-  Textiles
-  Clothing
-  Leather
-  Footwear

FARMING AND RAW MATERIAL SUBSIDIES FOR PRODUCERS OUTSIDE OF THE EU.

The subsidisation of raw materials such as cotton and leather in individual non-EU countries has allowed prices to remain low to manufacturers in these countries and gives them a competitive advantage. However, this has also distorted global competition as export restrictions are also at play. This is reflected in the number of World Trade Organisation disputes raised on this issue as countries look to protect their TCLF manufacturing base from global competition.

-  Textiles
-  Clothing
-  Leather
-  Footwear

IMPACT OF REGULATION AND GOVERNANCE DRIVERS

As TCLF production became easier to move overseas, the facilitation and the implementation of free trade agreements has directly affected the sector in Europe, providing both market opportunities but also increased competition. Much of this regulation and governance has opened the sector up to increasing international competition. With deregulation, this has seen large TCLF employment drops in Europe over the past two decades as production moved to countries with lower cost bases, something that a highly labour intensive sector such as fashion and textiles is sensitive too.

However, whilst sourcing and relocating production internationally will undoubtedly continue, especially within cost sensitive mass manufacture, the changing nature of the consumption in European markets with the growing importance of new business models based on short turns and short time-to-market may develop change. Coupled with increasing global standard of living and increasing wages overseas, these have the potential to encourage

the return of production in Europe or within a wide Euro-Mediterranean region. As the cost advantages of overseas manufacturing declines and the complexities of supply chains look to be brought under control, the economic advantages of manufacturing within Europe are becoming clearer and could influence sourcing decisions. Meanwhile, the subsidisation of cotton in some regions has continued to distort the market, which means in the longer term, the price of cotton may rise.

The net effect is that with any potential increases in production, this could lead to an increased demand for skills across the TCLF industries combined with a change in the profile of certain positions, to facilitate any return of production as market conditions allow. As production becomes more expensive if raw material prices rise, this may also lead to the curbing of fast fashion culture as consumers find TCLF goods more expensive to purchase and may even again see complex supply chains becoming less advantageous as marginal cost advantages are eroded.

³ http://ec.europa.eu/enterprise/sectors/fashion/index_en.htm
⁴ http://ec.europa.eu/enterprise/magazine/articles/smes-entrepreneurship/article_11111_en.htm

DEMOGRAPHIC AND POPULATION CHANGE

DEMOGRAPHIC AND POPULATION CHANGE:

Covering the impact of global population change; relative changes between advanced, developing and transitional nations, changes in the age profile of populations, migration pressures, infertility and life expectancy. Demographic change can be an important influence on skills needs because it can affect labour supply through population change and location of different sources of labour, and population change in itself can lead to increases and decreases in consumer demand for different kinds of goods and services, leading to expansion and contraction in related job volumes.

Demographics and population change play an important part for the outlook for the sector in Europe. Both the demand for TCLF products as the consumer base changes, and the demographics of the workforce who manufacture these products are highly sensitive to these drivers. Examples of these include:

Driver	Sectors effected
<p>THE AGEING WORKFORCE CURRENTLY EXISTENT WITHIN THE TCLF SECTORS.</p> <p>In Europe, the TCLF sector has a highly skilled but increasingly ageing workforce. This has been cause partly by an increasingly ageing demographic of the population as whole but also by the huge restructuring of the industry in recent decades, which has led to a decline in workforce numbers which has also ultimately led to reduced training investment and recruitment routes. The net result has been before this current TCLF industrial renaissance was that the sector was not attractive to potential new recruits due to limited opportunities. An ageing workforce brings its own problems with highly technical and practical skills acquired over many years are in danger of being lost. As workers reach retirement coupled with a lack of an adequately skilled replacement workforce able to step in, this could lead to large scale issues preventing the expansion of production and maintaining quality. A system of progressive retirement allowing older workers to transmit their know-how to young people could be a possibility to improve the intergeneration exchange of skills/competences, with young people better supported and older people seeing their knowledge recognised and validated by their employers.</p>	<ul style="list-style-type: none">  Textiles  Clothing  Leather  Footwear
<p>CHANGING TCLF REQUIREMENTS CATERING FOR AN OLDER POPULATION.</p> <p>The increasing median age of the European population as birth rates fall and people live longer has seen new market opportunities open to cater for TCLF products that focus on this population and niche production around comfort, health around personalised fittings, adjustments and promoting these products to this market segment.</p>	<ul style="list-style-type: none">  Textiles  Clothing  Leather  Footwear

Driver	Sectors affected
<p>INCREASE IN SIZE OF POPULATION AND INCREASE MIDDLE CLASSES IN DEVELOPING NATIONS.</p> <p>As countries develop economically and their populations expand, affluent middle classes in countries such as China with increased buying power are becoming more important and markets for TCLF manufacturers. This opens up many new opportunities for the sector. However, many countries in the Far East such as China are also seeing increasingly ageing populations. This means more spending on dependency costs that will also impact the cost of living for many of a working age. Social issues such as this are increasingly impacting wage inflation in many of these countries.</p>	<ul style="list-style-type: none">  Textiles  Clothing  Leather  Footwear

IMPACT OF DEMOGRAPHIC AND POPULATION CHANGE

An ageing and more affluent demographic in countries such as China will change the emphasis on internal spending and consumption patterns. This also has implications for production as population and socio-economic changes continue to pressurise previously low cost production arrangements as wages rise.

Within Europe, the TCLF sector is facing an ageing demographic within its workforce. Practical and technical skills within the manufacturing process learnt over many years are in danger of being lost as these workers reach retirement and with it will impact the sectors ability to both expand and to maintain the high quality manufacturing Europe is globally renowned for. How the sector can incentivise the transfer of expertise through the introduction of “mentoring” programmes, whilst also promoting the up skilling of older workers in pedagogical issues in order for them to be able to support newcomers to TCLF companies is therefore a major question. Older and experienced workers

are therefore able to transfer their knowledge and support the skills development of newcomers through mentoring. At the same time, old workers feel more valued and recognised within their organisations.

Additionally, ageing workers can feel marginalised within the sector and in some instances, do not find the motivation and resources to take up-skilling into their own hands. Coupled with training being an expense in both cost and time terms for the employer; with family and social commitments for the employee, these issues can prevent training from occurring. Thus, the ageing workers within the TCLF sector are not satisfactorily covered by the offer of specialised educational and training programs. In this respect, new solutions must be found for non-formal and informal learning, assessment, self-training, and new, innovative training methods have to be adopted, both in pedagogy and content.

ENVIRONMENTAL CHANGE

ENVIRONMENTAL CHANGE



(whether due to natural causes or human agency): covering climate change, pollution, changes in demand levels for different types of energy; availability and use of water and food; development of cities versus rural areas; disease and deforestation. Environmental change may lead to skills needs as a result of government policy and investment to tackle climate change through stimulating the development of a low carbon economy.

The TCLF sectors are at the forefront of the environmental agenda. Whilst a labour intensive sector, there is also a reliance on petro-chemicals for both manufacture and transportation.

This influences the environmental impact of TCLF products with a number of environmental drivers influencing employment and skills and ultimately occupational requirements. These are namely:

Driver	Sectors effected
<p>POSITIVE CONSUMER VIEW OF SOCIAL AND ENVIRONMENTAL SUSTAINABILITY.</p> <p>There is an increasing awareness of the sustainability and environmental agenda in Europe. Whilst cost is still the most important point for many consumers; the understanding of corporate social responsibility (CSR) concerns are beginning to shape buying habits of many although the price points between sustainable and non-sustainable products remain significant. Fashion retailers especially are increasingly at the forefront of CSR and carbon neutral retail and keen to market these credentials to consumers albeit at a slow pace. These are all positive for the EU-TCLF sectors. For example, the EU tanning sector is globally the most innovative and sustainable with the EU Leather Pilot for measuring the carbon footprint of the supply chain is of note whilst Italian tanneries are working closely within their district regions to mitigate the environmental impact of tannery activity. REACH compliance and the Restricted Substances List are also examples within footwear production. Within textile production, there has been a strong move towards the reduction of energy and water usage in the manufacturing process.</p>	<ul style="list-style-type: none">  Textiles  Clothing  Leather  Footwear
<p>INCREASED TRANSPARENCY WITHIN PRODUCTION AND SOURCING SUPPLY CHAINS.</p> <p>A new narrative for quality is no longer based on the characteristics of the materials and craftsmanship of the materials itself. Linked to the increasing importance of CSR, the increasing importance of transparent supply chains, with the disclosure of social, safety and environmental requirements relating to the entire production process found in a given country is becoming prominent. Given the de-localisation of these supply chains over the previous decades, producers able to show the journey of the product is increasingly desirable and influential on buying decisions. For instance, tannery manufacturers in Italy are themselves reporting the use of chemicals and recipes used within their processes to comply with guidelines to understand the impact of their activities which additionally is impacting the processes undertaken by suppliers.</p>	<ul style="list-style-type: none">  Textiles  Clothing  Leather  Footwear
<p>PUSH FOR FAVOURING/ENCOURAGING FOR RECYCLE/BIODEGRADE FIBRES AND AN INCREASED DRIVE TOWARD RECYCLING OF CLOTHING.</p> <p>Recycling of clothing has gained popularity as the recycling agenda becomes embedded within consumer behaviour although estimates on volumes are still confidential. This is increasingly facilitated by government initiatives and legislation as reducing waste and environmental targets becomes more and more important. The recycling of textile products and materials to facilitate this are becoming more important whilst in the leather sector, this emphasis means the raw hide from meat production is more accessible to the sector and favourable due to the process using waste products from meat production. Footwear production also has seen an increased demand for production using recycled and bio-degradable materials.</p>	<ul style="list-style-type: none">  Textiles  Clothing  Footwear
<p>TEXTILE MANUFACTURING AN ENERGY- AND PETROCHEMICAL-INTENSIVE BUSINESS.</p> <p>Production and supply chains have been under pressure due to the high energy intensive nature of production, with overseas production increasingly losing their economic advantage. The traditional model of production with high energy costs across both production and transportation chains are increasingly impacting sourcing decisions as these continue to rise.</p>	<ul style="list-style-type: none">  Textiles

Driver	Sectors affected
<p>HEAVY USE OF PESTICIDES IN CROP PRODUCTION FOR TEXTILES AND CLOTHING.</p> <p>Conventionally grown cotton is a pesticide intensive sector. The growing global need to find less harmful methods of cultivation that reduce the impact on both humans and the environment are of increasingly more concern.</p>	<ul style="list-style-type: none">  Textiles  Clothing
<p>SIGNIFICANT INCREASE IN THE COST OF RAW MATERIALS DUE TO CLIMATE CHANGE AND OTHER FACTORS.</p> <p>The price of cotton continues to increase as crops remain susceptible to climate change. Indeed, studies have shown climate change is a factor that impacts cotton production. Whilst for many, conditions for cotton have improved because of this, both drought and flood conditions suffered by cotton producers in different parts of the world along with strong global demand continue to pressurise cotton prices. These factors have led to climate change making, for instance, the cotton market more unpredictable and with it prices throughout the supply chain. It must also be noted there is still a price differential between low end and high end production cost with raw material costs impacting higher intensive manufacturing at the lower end although margins re squeezed within both. Within leather and footwear production, changes in global consumption patterns towards proteins that cannot lead to the production of tanned skins and the proliferation of export restrictions within producer countries are big factors. The tanning sector particularly has also seen these issues in the availability of hides from traditional medium and high-end sources due to availability which has led to pricing pressures. Bovine hide prices themselves have more than tripled in the previous five years.</p>	<ul style="list-style-type: none">  Textiles  Clothing  Leather  Footwear
<p>HIGHER WATER AND ENERGY COSTS PUSH CONSUMERS TOWARD CLOTHES WHICH ARE EASIER TO CARE FOR.</p> <p>Higher domestic energy costs along with changes to lifestyles are seeing consumers demand TCLF products that require less maintenance and care costs. This in turn requires manufacturers to come up with innovative materials and production techniques to facilitate this requirement.</p>	<ul style="list-style-type: none">  Textiles  Clothing  Footwear

2.2.4

ECONOMICS AND GLOBALISATION

IMPACT OF ENVIRONMENTAL CHANGE

Whilst the impact of environmental change has yet to be fully felt by the TCLF sector, these drivers are having a transformative effect on behaviour in the sector as both legislation and increasing consumer awareness of the environmental agenda combine to put TCLF manufacturing at the forefront of new processes, materials and commercial considerations to both comply with legislative demands but also ensure consumers demand can be created and harnessed around this agenda where European manufacturers have an advantage.

These requirements have seen occupations evolve and new occupations emerge within the sector to help deal with these considerations. Managers and senior professionals need to be aware of the environmental costs within the production and supply chains as well as how best to cater to changing consumer demand. All of these considerations are beginning to change production behaviour within the TCLF sectors.

ECONOMICS AND GLOBALISATION:

including rate of overall economic growth, distribution of wealth between individuals and nations, management practices and structure of organisations, nature of the workforce and international trade. Economic growth in developing economies may create pressure on European manufacturers to move into higher value-added markets, which may lead to increasing demands for higher level skills in some jobs, and place demands on capacity to adapt to the requirements of emerging overseas markets.

European TCLF manufacturing being both a labour intensive and consumer driven sector has been shaped by economics and globalisation more than any other sector.

As we have seen, governance and regulation has played a big part in facilitating these changes although the economics themselves have crucially enabled this. In particular, examples for the TCLF sector include:

Driver	Sectors affected
<p>INCREASING IMPORTANCE OF NON-CLOTHING USES FOR TEXTILES.</p> <p>As much of the European TCLF production was off-shored due to the lower costs of manufacturing overseas, many manufacturers rose to this challenge by diversifying and concentrated on high quality and niche manufacture. For example, in many textile producers' cases, this meant diversifying into high added value technical textiles production, textiles made not for aesthetics but for their properties in a variety of applications and sold in many different markets from aeronautics to agriculture, from cars to construction and health. European manufacturers are now among the world leaders in technical textile development. An example of this is the Belgian textile sector which in 2013 saw interior textiles account for 42 per cent and technical textiles 38 per cent of industry turnover and is a trend that is increasingly annually. Leather producers are also increasingly innovative in its outlook with leather applications for automotive, aeroplane and nautical industries for example all growing. This trend may also lead to supply issues as increasing demand from non-traditional sectors continues.</p>	<ul style="list-style-type: none">  Textiles  Clothing  Leather  Footwear
<p>TCLF MANUFACTURING PERCEIVED AS A RISKY BUSINESS BY BANKS AND OTHER FINANCIAL INSTITUTIONS.</p> <p>As the financial crisis saw bank lending to businesses restricted, lending to TCLF start-ups has been particularly hit as banks steer away from perceived riskier ventures. Whilst European Institutions have provided finance for SMEs, this is distributed by local banks unwilling to lend to the TCLF sectors. This means fewer opportunities for start-ups to come to market in the recent past to help with both the growth of the sector and aid the economic recovery whilst also watering-down research and development innovation policies by hampering the introduction of innovative products and processes resulting from the collective research and development efforts both carried-out at European or national/regional level.</p>	<ul style="list-style-type: none">  Textiles  Clothing  Leather  Footwear
<p>EUROPEAN FOCUS ON NICHE PRODUCTS.</p> <p>As mass manufacturing was off-shored from European countries during recent decades past, as well as concentrating on technical textiles, European producers have concentrated on niche areas of value added activity and product development. For many this means moving up the value chain, with high quality manufactured fashion and textiles goods, better service and innovative new ideas using TCLF materials being undertaken by manufacturers to preserve this excellence. However, this must also be tempered by focussing on the issue that niche production will be unable to sustain full manufacturing within a sector, in particular if companies are facing difficulties for financing the launch of new innovative products that also require the up-skilling of the workforce.</p>	<ul style="list-style-type: none">  Textiles  Clothing  Leather  Footwear
<p>THE RISE OF MULTI-CHANNELLING AND E-COMMERCE.</p> <p>Multi-channelling and utilising different sales techniques and conduits plays a growing role in the success of the leading brands in Europe and world-wide. In tandem, e-commerce has accelerated the globalisation of both products and brands as European producers now find themselves with potential customers across the globe. This has required companies to restructure their operations at both manufacturing and supply chain level in order to respond to this new global demand and brand development as demanded by the growing consumer base.</p>	<ul style="list-style-type: none">  Textiles  Clothing  Leather  Footwear

Driver	Sectors effected
<p>FLUCTUATING CURRENCY EXCHANGE RATES.</p> <p>TCLF manufacturing is a price sensitive sector with production and sourcing decisions particularly reliant on exchange rates. For instance, a strong Euro ensures the import of raw materials is cheaper to purchase for European manufacturers but also makes the climate difficult for exports outside of the EU-28 as goods are relatively more expensive to the client market they are looking to service. A weaker Euro would mean these issues reversing.</p>	<ul style="list-style-type: none">  Textiles  Clothing  Leather  Footwear
<p>RISE OF NEW FASHION WEEKS AND TRADE FAIRS.</p> <p>As affluent middle classes grow across the globe, there has been a rise in fashion weeks and trade fairs to cater for the growing consumer culture. This has created more opportunities for both manufacturers and designers to showcase their products in new and existing markets. However, this can also dilute impact and prove more costly as firms have to choose where to promote their products and spread finite resources.</p>	<ul style="list-style-type: none">  Textiles  Clothing  Leather  Footwear
<p>INCREASING INTEGRATION OF DESIGN, PRODUCTION, DISTRIBUTION, AND RETAIL.</p> <p>Increasingly, manufacturers and retailers are looking to control production and supply chains with greater integration of the management of these processes with these changes being embraced within the sector. This has seen the traditional separation between design, manufacture, wholesale and retail more closely integrate as the need to respond to the market quickly. With the technological enablers facilitating these changes, this also has the influence of driving up standards as supply chains are more closely managed through the stages of production to consumption.</p>	<ul style="list-style-type: none">  Textiles  Clothing  Leather  Footwear
<p>INCREASING COSTS OF MANUFACTURING OVERSEAS IN PREVIOUS LOW WAGE ECONOMIES.</p> <p>As wages rise overseas, costs of offshore production are increased. This is especially pertinent for a high labour intensive manufacturing sector such as the TCLF industries where labour costs are a substantial part of production costs. Coupled with higher fuel and logistics costs further pressurising manufacturing overseas, this has led to companies starting to move towards repatriation of TCLF manufacturing as on-shoring and competitive advantage is whittled away, especially in short-run higher end and low volume manufacturing.</p>	<ul style="list-style-type: none">  Textiles  Clothing  Leather  Footwear
<p>IMPORTANCE OF EXPORT MARKETS WITH THE RISE OF NEW MARKETS AND CONSOLIDATION WITHIN TRADITIONAL ONES.</p> <p>A growing middle class in the BRIC countries and other developing nation's means there are new export markets opening up for TCLF goods produced within Europe. Euro-produced TCLF goods are renowned for their design, style and craftsmanship and therefore popular within overseas markets. Indeed, exports to other non-EU countries have been a large growth area in recent times for European manufacturers. Meanwhile, traditional non-European markets for TCLF goods such as America and Japan along with the markets in the Middle East and North Africa are still significant and remain important to European manufacturers.</p>	<ul style="list-style-type: none">  Textiles  Clothing  Leather  Footwear

IMPACT OF ECONOMICS AND GLOBALISATION

Being a high labour and skills intensive sector, TCLF manufacturing has been one of the most significantly impacted by globalisation and economics. As off-shoring has redefined the sector and changed business strategies, manufacturers emphasis has increasingly been on finding innovative approaches as seen by the move to niche and innovate manufacturing within specialised markets and technical textiles development. This requires a workforce with innovative science, technology, engineering and manufacturing (STEM) skills and the ability to commercialise production.

Whilst traditional export markets have continued to flourish, there has also been an increasing emphasis on new markets as the growing middle classes in new economies - keen on European

manufacturing - offer opportunities for TCLF manufacturers with the role of e-commerce also critical in this upturn as products and brands find there reach increasingly global. This requires manufacturers to understand their markets and how to sell within them. It also requires innovative design along with a highly skilled workforce able to produce high quality TCLF products that are tailored to these markets.

E-commerce has also promoted the appearance of new designers/manufacturers that place their collections on-line and just collect orders from their atelier. This has created a new culture of owner-maker businesses with increasing levels of self-employment and new business models emerging that too require new skills to thrive.

TECHNOLOGICAL CHANGE:

Covering the impact of global population change; relative changes between advanced, developing and transitional nations, changes in the age profile of populations, migration pressures, infertility and life expectancy. Demographic change can be an important influence on skills needs because it can affect labour supply through population change and location of different sources of labour, and population change in itself can lead to increases and decreases in consumer demand for different kinds of goods and services, leading to expansion and contraction in related job volumes.

As with many sectors, the continued advancements in technology has profoundly changed the way the TCLF sectors operates on many levels and in many respects and is a key driver of skills changes. Below is an illustration of how technological change has impacted the sector:

Driver	Sectors effected
<p>EVOLUTION OF MANUFACTURING TECHNIQUES AND MATERIALS.</p> <p>How TCLF products are manufactured along with their application are evolving as advancements in production processes, techniques and materials are made. For instance, increasingly more sophisticated computer aided design, virtual manufacturing simulators, the laser welding of garments, the production of smart clothing and footwear, the introduction of more ecological sustainable chemicals in the leather sector and new efficient machinery and in some cases robotic manufacturing processes such as in the footwear sector are examples of enabling technologies that can offer new commercial possibilities for manufacturers. Whilst many of these new processes are automated requiring new skills to undertake them, there is also a need to ensure traditional TCLF knowledge and principles are embedded and training requirements are widely understood.</p>	<ul style="list-style-type: none">  Textiles  Clothing  Leather  Footwear
<p>THE INCREASING IMPORTANCE OF TECHNICAL TEXTILES.</p> <p>As traditional mass textile manufacture moved beyond European borders, there has been a rise in the development of technical textiles, textiles created for performance rather than aesthetics requiring a whole new skill set within the sector. Technical textile development has become a key driver for many producers moving away from traditional textiles markets where knowledge and innovation are required. The leather sector with new innovations, especially within automotive and aeroplane production is increasingly important and are the equivalent to technical textiles in this sector whilst footwear has seen a need for new lighter, stronger, performance and ecological materials. However, technical textiles remain costly to produce, with the ability to commercialise them also important. There also remain substantial intellectual property rights (IPR) issues which are crucial to the maintenance and growth of this sector.</p> <p>Additionally, the emergence of nanotechnology and nanomaterials allow product development and differentiation as never seen before is possible, responding to both new consumer requirements as well as creating new product demand, e.g, stress controlled footwear (with special insoles), antistatic footwear, perspiration controlled footwear, smart textiles/garments to name but a few. This implies a new high-level generation of experts who will know how to use nanotech and how to explore it in benefit of European TCLF production and differentiation according to the product market.</p>	<ul style="list-style-type: none">  Textiles  Clothing  Leather  Footwear

Driver	Sectors affected
<p>GROWTH OF SPECIALIST MANUFACTURING.</p> <p>Along with niche manufacturing, there has been a rise in manufacturing for specialist applications and products as manufacturers looked to diversify and identify opportunities for new products and services.</p> <p>Again, this is partly in response to losing traditional markets but also to advances in technology that have opened up exciting possibilities for manufacturers as innovation and creativity are increasingly enabled.</p>	<ul style="list-style-type: none">  Textiles  Clothing  Leather  Footwear
<p>MOVE TOWARDS FULL KNOWLEDGE ECONOMY AND FOCUS ON RESEARCH & DEVELOPMENT IN THE TCLF SECTORS.</p> <p>Innovation is fundamental to unlock the next generation materials and processes. The move from mass manufacture has placed a growing and important emphasis on research and development to drive growth and profitability as firms strive to ensure they have products and processes that are both innovative and commercially viable. Stakeholders, professional association, social partners, policy makers and other experts have revealed that there is a huge need for increasing the level of involvement of new technologies, innovation and creativity in this area. Thus, more than ever, TCLF companies are required to boosting their innovative potential. On the other hand, TCLF businesses themselves can benefit from the huge knowledge still unexploited in the form of research undertaken by research centres and universities through EU and national funded projects over recent years, much of which remains unexploited.</p>	<ul style="list-style-type: none">  Textiles  Clothing  Leather  Footwear
<p>GROWING IMPORTANCE OF ONLINE SALES, OFFERING OPPORTUNITIES IN NEW MARKETS.</p> <p>Online has taken off as a major sales route for manufacturers, many of whom now sell from source and with it have seen how items are presented as well as sold evolve to take advantage of this new channel of commercialisation. This is opening up opportunities that were not possible before. Online also allows manufacturers to advertise their brand to larger audiences than previously possible and establish familiarity with consumers. Furthermore, technology has enabled both virtual and augmented reality in the marketing and sales of TCLF products.</p>	<ul style="list-style-type: none">  Textiles  Clothing  Leather

IMPACT OF TECNOLOGICAL CHANGE:

Technological change has seen the sector diversify into many new areas. Europe is a leading player in technical textile production and innovation in materials as these advancements become more viable and commercially important, transforming many traditional textile applications.

Technology can be seen to have transformed many processes involved within the TCLF manufacturing supply chain. From design, to production, to distribution through to marketing and sales, technological advancements have required employees within a multitude of occupations to obtain new skills, skills that are driving innovation within the sector and enabling Europe TCLF employers to maintain a competitive

advantage.

Technological change additionally requires the right mix of skills, both professional and transversal, from highly qualified employees in order to demonstrate their competence for applied research, development and technological transfer. Also, because of labour costs, most TCLF companies are not able to employ a number of staff with a STEM related academic degree or particular specialisation within a technological field. Therefore, top and middle managers, technicians/ engineers, product and process developers need having skills and competencies in research, innovation and technological transfer in order to complete their experience and knowledge background.



VALUES AND IDENTITIES

CHANGING VALUES AND IDENTITIES:

Covering family structures, attitudes towards government, citizenship, education, religion. Changes in values and identities will include attitudes to work and may therefore affect labour supply through influencing choices about type and conditions of work

The goods produced by the TCLF sector are frequently influenced by changes in values and identities, many of which go hand in hand with the expectations of consumer demand as fashion is often a statement and trends changes regularly. These can lead to a number of modifications required within manufacturing requirements and processes. These include:

Driver	Sectors effected
<p>STRENGTH OF TRAINING AND EDUCATION IN EUROPE.</p> <p>TCLF skills training is well established across Europe and is high quality and responsive to employer need. This ensures that employers are able to access training in order that the quality of production remains high, that technical and craft skills are preserved whilst training in new techniques and processes required to compete in a global environment are available. One issue however is that whilst quality is high, sector dedicated training infrastructure in many European countries requires rebuilding following the closure of many providers during the years manufacturing was off-shored.</p> <p>Indeed, the TCLF industry is lacking scholars which impacts on the knowledge preservation and the survival of dedicated schools with curriculums in line with companies need. Moreover, access to training appears to be difficult as the industry is dominated by smaller size companies. The latter cannot afford training or to send staff to dedicated vocational training session as their presence is crucial for the activity of the business. This is a significant challenge with the view of ensuring the maintenance of existing skills in the workforce.</p>	<ul style="list-style-type: none">  Textiles  Clothing  Leather  Footwear
<p>LOW ATTRACTIVENESS OF SECTOR FOR YOUNG PEOPLE.</p> <p>The TCLF sector still suffers from an image problem within broad public perceptions which causes difficulties in attracting new recruits, especially from younger workers. Whilst careers in design remain popular, careers within the production chain remain difficult to promote. This is due to a number of factors associated with the decline in employment faced in the recent past; the loss of training infrastructure (see above); the sector not considered to offer viable career path and importantly the traditional public perception of the sector as a non-attractive working environment. Whilst the sector has evolved with many exciting opportunities available alongside traditional artisan and craft occupations, especially as technologies continue to drive change, this need communicating to a potential new workforce required to ensure the sector reaches its growth potential.</p>	<ul style="list-style-type: none">  Textiles  Clothing  Leather  Footwear

 5 STEM is an acronym referring to the academic disciplines of science, technology, engineering and mathematics

Driver	Sectors effected
<p>LOW ATTRACTIVENESS OF VET STUDIES FOR YOUNG PEOPLE.</p> <p>As much of the European TCLF production was off-shored due to the lower costs of manufacturing overseas, many manufacturers rose to this challenge by diversifying and concentrated on high quality and niche manufacture. For example, in many textile producers' cases, this meant diversifying into high added value technical textiles production, textiles made not for aesthetics but for their properties in a variety of applications and sold in many different markets from aeronautics to agriculture, from cars to construction and health. European manufacturers are now among the world leaders in technical textile development. An example of this is the Belgian textile sector which in 2013 saw interior textiles account for 42 per cent and technical textiles 38 per cent of industry turnover and is a trend that is increasingly annually. Leather producers are also increasingly innovative in its outlook with leather applications for automotive, aeroplane and nautical industries for example all growing. This trend may also lead to supply issues as increasing demand from non-traditional sectors continues.</p>	<ul style="list-style-type: none">  Textiles  Clothing  Leather  Footwear
<p>DIFFICULTY ATTRACTING STEM⁵ GRADUATES INTO THE TCLF INDUSTRIES.</p> <p>As the financial crisis saw bank lending to businesses restricted, lending to TCLF start-ups has been particularly hit as banks steer away from perceived riskier ventures. Whilst European Institutions have provided finance for SMEs, this is distributed by local banks unwilling to lend to the TCLF sectors. This means fewer opportunities for start-ups to come to market in the recent past to help with both the growth of the sector and aid the economic recovery whilst also watering-down research and development innovation policies by hampering the introduction of innovative products and processes resulting from the collective research and development efforts both carried-out at European or national/regional level.</p>	<ul style="list-style-type: none">  Textiles  Clothing  Leather  Footwear

Driver	Sectors effected
<p>IMPORTANCE OF 'NARRATIVE' FOR DEVELOPING AN APPEAL FOR TCLF PRODUCTS.</p> <p>Whilst, the relationship between price and quality are paramount to European producers, brand identity is of increasing importance as the consumer increasingly able to interact and understand brand values. Often based on heritage, European clothing and footwear manufacturers look to distinguish their products from competitors by communicating the strengths of European craftsmanship and manufacture. For leather and textiles producers, this is created under the angle of appeal of the material that feeds the final application. However, there also remains an issue of how to create mechanisms that allow manufacturers to showcase the materials used to the consumer which would be advantageous to EU-TCLF manufacturers.</p>	<ul style="list-style-type: none">  Textiles  Clothing  Leather  Footwear
<p>CREATIVITY AND HERITAGE OF EUROPEAN DESIGN A MAJOR STRENGTH.</p> <p>European design and manufacture is world renowned with designers and brands commanding global recognition. As such they are highly prized in both domestic and export markets. Being able to offer this sense of superior design, tradition and craftsmanship is important to offering a compelling case for the market and should be fostered through all means. Certainly the strengthening of the "luxury" cluster is one way to support European creativity and the maintenance of knowledge and skills</p>	<ul style="list-style-type: none">  Textiles  Clothing  Leather  Footwear
<p>GROWTH OF THE SECOND-HAND SECTOR.</p> <p>The rise of second hand and vintage clothing trends has seen an upturn in both recycling and upcycling previously owned clothing. This in itself is informing consumption habits, and with fashion in many cases proving cyclical, has provided a demand for previously owned goods and services.</p>	<ul style="list-style-type: none">  Textiles  Clothing  Leather  Footwear

IMPACT OF VALUES AND IDENTITIES

The strength of the European brand and maximising this heritage within domestic and non-European markets are fundamental to the sector success. This puts emphasis on manufacturers to continue to offer innovative and high quality products to market, understanding the importance of the brand for consumers and the materials used to produce their goods and services.

The building of training infrastructure and changing perceptions concerning careers within the sector are important if the sector is able to take advantage of the opportunities that are currently on offer.

CONSUMER DEMAND

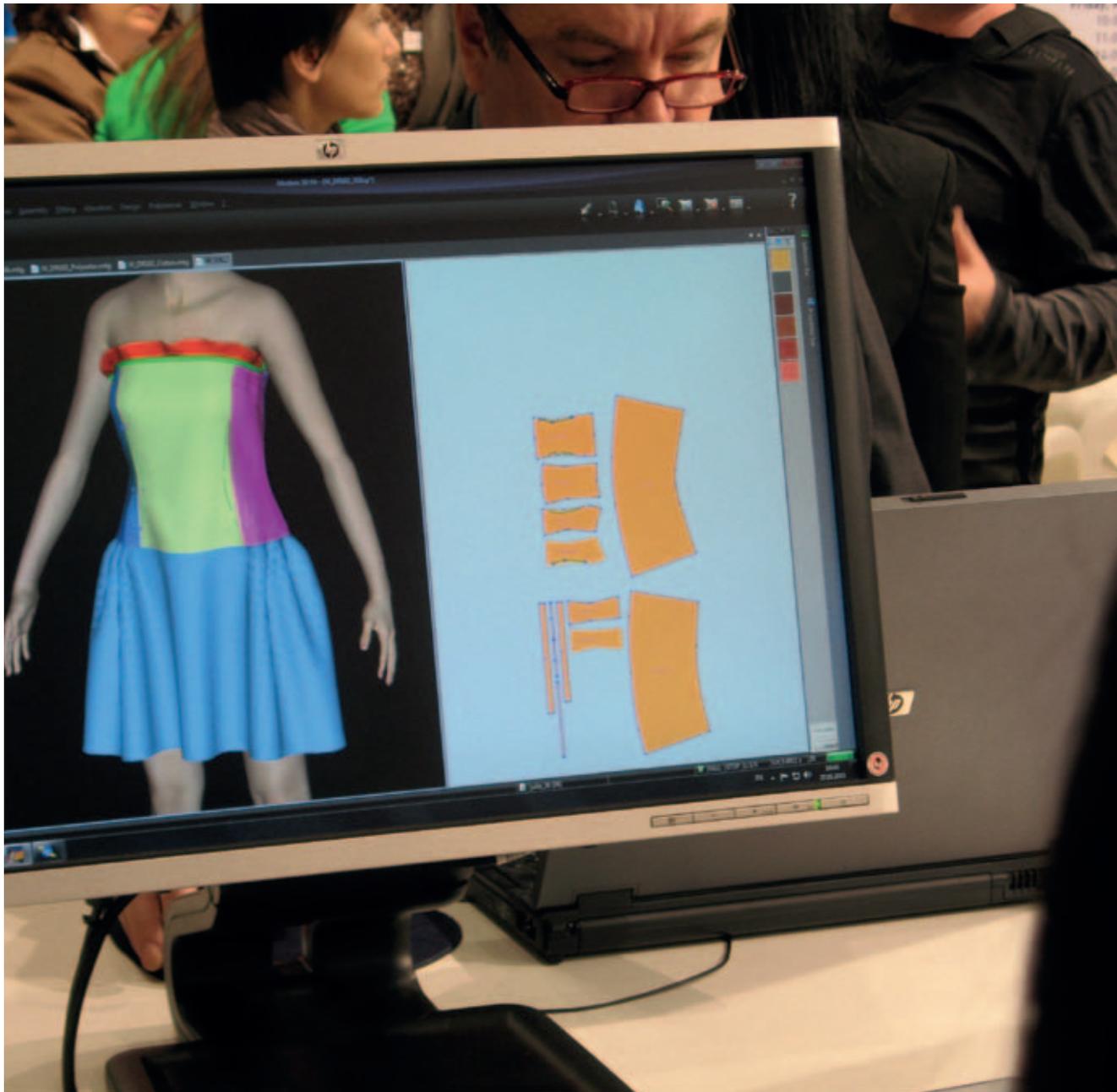
CHANGING CONSUMER DEMAND:

covering changing consumer choices and expectations about type and quality of products and services.

The development of niche consumer markets, consumer preferences for tailored goods and services and rising consumer expectations about service quality ensure consumers expect more and more from their TCLF products. In all aspects, the TCLF sector is never standing still because consumer demand and indeed creating consumer demand remains paramount for producers. Examples of drivers within this are:

Driver	Sectors effected
<p>DEMAND FOR PERSONALISATION.</p> <p>Increasingly, the consumer is able to demand greater levels of personalisation to their TCLF products as technology and improved production techniques can facilitate these customer demands. This can also stimulate demand in Europe by allowing manufacturing to take place in lower wage countries whilst the process of personalisation occurs in Europe where technologies such as 3D and digital printing can be applied.</p>	<ul style="list-style-type: none">  Textiles  Clothing  Leather  Footwear
<p>INCREASED PACE OF CHANGE FOR FASHIONS.</p> <p>Fast fashion has seen traditional fashion seasons rhythm no longer applicable. This is an attempt from designers, manufacturers and retailers to satisfy the ever-changing needs of the sophisticated consumer in Europe. Moreover the growing role of e-commerce favours companies able to propose an integrated and rapid/lean manufacturing process including the possibility of customisation of the final product. In both cases deliveries within days rather than months is paramount.</p>	<ul style="list-style-type: none">  Textiles  Clothing  Leather  Footwear
<p>IMPORTANCE OF EUROPEAN COUNTRY OF ORIGIN BRANDING FOR FOREIGN SALES.</p> <p>European manufactured TCLF products are synonymous with quality and heritage and country brands are important in both domestic and export markets. They are popular within emerging markets, being highly regarded by the growing middle classes as well as buyers in traditional markets such as the USA and Japan. This is reflected in the export performance of TCLF products from European countries to international markets. Being able to trade on a "made in" label is an advantage enjoyed by a number of TCLF manufacturing countries in Europe when married with quality at the correct cost price.</p>	<ul style="list-style-type: none">  Textiles  Clothing  Leather  Footwear

Driver	Sectors affected
<p>LOW-PRICE DOMINANCE OF THE RETAIL SECTOR.</p> <p>Whilst consumers are more aware of ethical TCLF purchases and the quality of home manufactured goods, the retail scene is still dominated by low cost fashion as salaries remain deflated within Europe. In a competitive retail environment and with disposable income for many still weak following the recession, the emphasis for many of the more successful retailers has been on price point. This naturally disadvantages European manufacturers in domestic markets whose competitive advantage is built on the quality and strength of design and with it higher production costs.</p>	<ul style="list-style-type: none">  Textiles  Clothing  Leather  Footwear
<p>DIFFERENT GENERATIONAL AND POPULATION BUYING HABITS, BUT CONSUMERS DEMAND BOTH CHEAPER CLOTHES AND BETTER WORKING CONDITIONS IN DEVELOPING COUNTRIES.</p> <p>Although there is a growing polarisation in demand and buying habits fostered by demographics (the grey hair generation), there is a growing awareness fostered by the younger generations towards the importance of sustainable manufacturing. Despite that, public reactions to global incidents (e.g. the Rana Plaza tragedy in Bangladesh) will reinforce the wide-spread consciousness of a “global negative sector image” of the TC(LF) sectors among consumers but will not be immediately translated into more sustainable buying habits (e.g. preference for EU or nearby and sustainable production). The consumer is not in the position to immediately change its consumption habits as low priced TCLF products remains still popular for economic reasons. Nevertheless, such dramatic events have and will impact strongly the consumer consciousness and we can expect at medium to longer terms moves in consumer behaviour towards more sustainable products.</p>	<ul style="list-style-type: none">  Textiles  Clothing  Leather  Footwear
<p>CHANGING PERCEPTIONS OF ‘LUXURY’.</p> <p>Luxury is no longer the domain of the higher end consumers. With increased media coverage and higher quality expectations of consumers, luxury has become a standard and therefore increasingly European manufacturers have been under pressure to make luxury or beautiful design and quality affordable to all.</p>	<ul style="list-style-type: none">  Textiles  Clothing  Leather  Footwear
<p>ANIMAL WELFARE – LIMITING SUPPLY/INCREASING COST OF RAW MATERIALS</p> <p>There have been a number of legislative changes coupled with an increased consumer awareness of the treatment of animals. Better treated animals are more likely to have fewer defects on their skins and therefore of a higher standard which is good for high quality leather manufacturing for instance. This provides an advantage to European suppliers who are strongly regulated in this area and whose raw materials are high quality whilst the standards of supply from non-EU sources are improved too.</p>	<ul style="list-style-type: none">  Leather  Footwear



IMPACT OF CONSUMER DEMAND:

Within the TCLF sector, trends change daily and meeting consumer demand is paramount to the success or failure of products coming to market. Therefore, it is essential to understand what consumers want and how to transform these demands into a reality both in production and sales. This requires designers to be aware of consumer demand requirements, production managers to ensure that manufacture is possible within the timescales demanded and for the manufacturing process to meet the high quality standards that European manufactured products are required to display.

Potential growth drivers like an understanding of ethical production, the importance of "Made in" country labels can have a positive effect for the sector in Europe, whilst European manufacturers ability to create innovative design-led production and the ability to react to requests for personalisation require better up-skilling of the European TCLF workforce.

OCCUPATIONS AND HOW THEY HAVE CHANGED WITHIN THE EUROPEAN TCLF SECTOR

The drivers of change identified in the previous chapter have profoundly changed the way the sector operates, with the skills and competences that are required and utilised all evolving and changing in this regard. This section aims to inform the reader about examples of occupations within the TCLF sectors; how they have evolved or gained more prominence based on how these drivers of skills demand have shaped the sectors skills required.

Accurately identification of occupations within the TCLF sectors has recently been undertaken through the European Skills, Competences, Qualifications and Occupations (ESCO) initiative. The ESCO process has seen occupations with the TCLF sectors classified from the viewpoint of industry to offer a practical, transferable and holistic framework for skills, competencies and qualifications for the sector within a European context. Creating this taxonomy allows employers, providers and stakeholder to access to a methodology that ensures the skills and competency requirements of the workforce are understood and can be met through training tailored to these requirements.

AN INTRODUCTION TO ESCO

ESCO is the multilingual classification of European Skills, Competences, Qualifications and Occupations. ESCO is part of the Europe 2020 strategy.

The Commission services launched the project in 2010 with an open stakeholder consultation. DG Employment, Social Affairs and Inclusion and DG Education and Culture – supported by the European Centre for the Development of Vocational Training (Cedefop) – jointly coordinate the development of ESCO. Stakeholders are closely involved in the development and dissemination of ESCO.

The ESCO classification identifies and categorises skills, competences, qualifications and occupations relevant for the EU

labour market and education and training. It systematically shows the relationships between the different concepts. ESCO has been developed in an open IT format, is available for use free of charge by everyone and can be accessed via the ESCO portal.

The first version of ESCO was published on 23 October 2013, which marks the beginning of the pilot and testing phase. Until 2017 the classification will be completely revised. The final product will be launched as ESCO v1.

Figure 16

BREAKDOWN OF OCCUPATIONS IDENTIFIED BY ESCO IN THE TCLF SECTORS

Through TCLF sector wide consultation, 107 specific occupations have been identified during the ESCO development process. This illustrates the highly technical and diverse nature of process and procedures within occupations within these sectors. The breakdown across the four sectorial groups that compose the TCLF industries is as follows⁶:



directly from the Office for National Statistics Standard Occupational Classifications list.⁷

Case studies of occupations are then offered. These are based on the specific ESCO taxonomy and illustrate how specific occupations work in practice, how they have evolved and how they have been shaped by the requirements of the drivers of skills demand on the sector.

The examples have been selected based on the depth and breadth of the sector to illustrate how each of the TCLF sectors have seen skills requirements continue to change and evolve.

Whilst ESCO is unstructured, helping to highlight the multi-disciplined nature of many of the occupations it encompasses to be categorised, for the purposes of reporting and to offer a general framework for grouping these into categories, broad ISCO categorisation is used for reporting. The descriptors of these broad groups are taken

⁶ n.b. The ESCO classifications for the TCLF sectors are still in their development phase. The number of occupations identified for each sector was correct at the time of this documents publication.

⁷ <http://www.ons.gov.uk/ons/guide-method/classifications/current-standard-classifications/soc2010/soc2010-volume-1-structure-and-descriptions-of-unit-groups/soc2010-volume-1.pdf>

MANAGERS

As we have seen, the TCLF sector that has seen substantial change from how the sourcing of materials and suppliers works, to production techniques and changing market requirements and to the need to understand new markets. With all of these changes on how the TCLF, the role of managers in their various guises to understand, react and plan accordingly to these evolutions is of paramount importance. There are a multitude of managerial occupations within the TCLF sector. For the purposes of reporting, examples of managerial occupations identified within the ESCO initiative include:

Footwear Product Development Manager

The footwear product development manager coordinates the footwear design and product development process in order to comply with design specifications, deadlines, strategic requirements and policies of the company. A key part of this role is communicating and collaborating with other cross functional teams or professionals involved in footwear production, such as: logistics and merchandising, materials

management, costing, planning, production and quality assurance.

The main tasks and responsibilities are in the area of footwear product/collection development. These include tracking style development, reviewing design specification in order to meet the design vision, the manufacturing environment, and the company's financial goals.

Textile Product Developer

Due to the evolution to the creation of technical textiles, the job of textile product developer has become increasingly 'technical' requiring in-depth textile knowledge. The textile product developer has to translate the client's wishes into a textile solution that requires specific competences, in many instances working closely with designers. They will analyse market areas with their research required to keep up with competition and trends. They are also required to optimise and/or adapt existing products which have a shorter life cycle, in order to increase their market potential and conduct cost benefit analysis of potential product

development. Additionally they have to take the client's needs into consideration, such as product standards and environmental issues and in many ways act as within a sales role.

Textile product developers are required in many cases to work closely with computer aided design packages, often within research and development environments, and have to have an understanding of the structures and properties of a variety of materials and the processes required to manufacture the goods. Textile product developers can also be required to manage a portfolio of products often running projects concurrently within various environments.

Leather Environmental Manager

Leather production is a heavily chemical reliant industry with a variety of chemicals required to produce high quality leather. Leather environmental managers are therefore required to understand the working procedures being undertaken and to ensure the environment within the production process is safe, meeting legal standards and that

these standards are maintained through proper procedures. They are also required to ensure contingency plans are in place for any incident that may occur.

Key skills include the drafting and application of working processes and procedures, communicating safety plans to the workforce, negotiating the implementation of procedures and problem solving.

Quality Manager (Footwear)

The quality manager in footwear is the professional who manages and promotes the quality system implemented within their company, ensuring the established requirements are accomplished and objectives, fostering internal and external communication, and promoting continuous improvement and with it customer satisfaction. This occupation in the field of footwear quality management involves specific knowledge and skills about footwear processes and related technology. This includes all phases of footwear manufacturing, different types of construction, raw materials, components, as well as a specific

knowledge and domain of footwear standards and quality specifications.

The big difference from the already existing profiles of quality manager is the specificity of the standards most common in footwear, the specificity of the process and products, with the operations of a footwear company very diverse and multi-disciplinary. This demands an analytical and logical approach, deciding and problem solving capacities, in addition to leadership and communication skills.

Table 5

IMPACT OF DRIVERS OF CHANGE ON EXISTING OCCUPATIONS: MANAGERS

EXAMPLE MANAGERS	REGULATION AND GOVERNANCE	DEMOGRAPHIC AND POPULATION CHANGE	ENVIRONMENTAL CHANGE
<p>Footwear Product Development Manager</p>	<p>Required to know about legislation regarding production including safety and design standards.</p>	<p>Required to ensure production meets requirements and therefore needs to ensure the workforce can undertake the work.</p>	<p>Footwear production needs to take into account both the sourcing of materials and the CSR of production. It is therefore imperative the product development manager is able to take these into account.</p>
<p>Textile Product Developer</p>	<p>Required to know legislation regarding both production and logistics and how design and production techniques may influence these.</p>	<p>Understanding how the implications of the populations requirements impact both sourcing decisions and the markets for sales.</p>	<p>Environmental impact of both production and logistics are important. Understanding the ethics of production are required as consumer CSR becomes more important.</p>
<p>Leather Environmental Manager</p>	<p>The leather industry and its heavily regulated use of chemicals means these skills are required.</p>		<p>The potential environmental impact and health and safety implications of chemical usage and raw hide treatment means the storage and use of chemicals needs to be taken into account.</p>

 Source: ESSC

ECONOMICS AND GLOBALISATION	TECHNOLOGICAL CHANGE	VALUES AND IDENTITIES	CONSUMER DEMAND
<p>Production and sourcing decisions are reliant on a number of factors including cost, time to market and the ability of to produce. These require the product manager to take these into account.</p>	<p>New technologies and leather treatments make different production techniques possible. This requires the product development manager to utilise these changes as per the requirements.</p>	<p>Footwear product development managers require a workforce with the skills required to make the products and therefore need to ensure this happens.</p>	<p>Product development managers are responsible for making sure the production run matches the designs set out that are based on consumer demand. Being able to follow these is imperative.</p>
<p>The product design will influence both sourcing decisions and price points. There is a need to understand the markets for sales.</p>	<p>Technology has changed both production techniques and material properties. This requires the developer to understand what is applicable to the market.</p>	<p>How the product can be part of the brand image. What unique features of production can drive sales. They also need to ensure the workforce have the skills to make the designs a reality.</p>	<p>Production has to take into account consumer demand and therefore based on market research and/or market leading innovative design.</p>
<p>The sourcing of leather and chemical treatments require an understanding of storage, shipping and disposal techniques.</p>	<p>Technology has enabled greater advances in health and safety processes and procedures that requires the role to take these into account.</p>	<p>The environmental manager has a responsibility to drive up standards consistent with both legal but also personal compliance based on the standards the workforce expects.</p>	<p>Consumer demand dictates' the types of processes the leather has to undertake with changing markets. Therefore, compliance is based on ensuring processes and procedures required are consistent with this.</p>

PROFESSIONALS

Professionals within the context of TCLF occupations are mainly occupations involved with the scientific and technological advancements within the sector. These roles are closely associated with both the evolution of material properties and processes and responsible for developing ideas and concepts that are commercially viable. Examples within the ESCO classification include:

Textile Laboratory Technician⁸

Performs physical laboratory tests on textile materials and products, interprets results and writes reports. (ESCO)

Textile Laboratory Technicians usually carry out experiments and tests that are then handed to a senior scientist for interpretation. Within footwear, apparel, textile and related industries, this includes checking product quality, resilience to corrosion, durability, strength or colour matching.

Many Textile Laboratory Technicians work within the technical textile industry and analyse the

properties of fibres and textiles, from tensile strength to heat or corrosion resistance. The textile dyeing industry also employs Technicians in this area to formulate the strength of dyes and colour-matching swatches to meet the client's requirements.

Textile Laboratory Technician need a broad range of skills including have a good understanding of science, a methodical mind, good practical and technical skills, including IT and be a strong communicator.

Footwear Quality Control Laboratory technician

This technician has a broad understanding about footwear processes and products, executing laboratory control tests of footwear, materials and components, under both national and international standards. These are managed in detail, analysed and interpreted with the results used to prepare reports, propose corrective measures, makes the linkage with outsourced laboratories for the tests which cannot be performed inside the company. This is more specific occupation than in the field of

footwear quality management, involving specific knowledge and skills, which are far from the transversal description and classification already existing to cover "laboratory activities/occupations". It needs a broad knowledge on the footwear processes and related technology/machinery, including all phases of footwear manufacturing and different types of construction, raw materials, components, and a specific knowledge and complete domain of footwear specific standards for quality control laboratory tests, related equipment, methods, preparation of samples, tests procedures, analysis and comparisons with guidelines/standards.

Organisation and Methods (work studies) technician:

Organisation and methods technician in footwear companies are the professionals who analyse product technical specifications, define productive operations and its sequence, refines working methods, calculates operative times by using time measurement techniques, addresses human and technological resources to each operation, defines

distribution of work according to production capacity in order to maximize productivity and to reduce production costs, assuring the functionality and quality of product and customer satisfaction.

Besides involving knowledge and skills related to operative time calculations and time measurements techniques as well as indicators and ratios calculation, which can be considered transversal to many sectoral activities, this occupation involves a deep knowledge on footwear manufacturing concerning all phases of the process, different types of construction, raw materials, components, technology/machinery and product engineering.

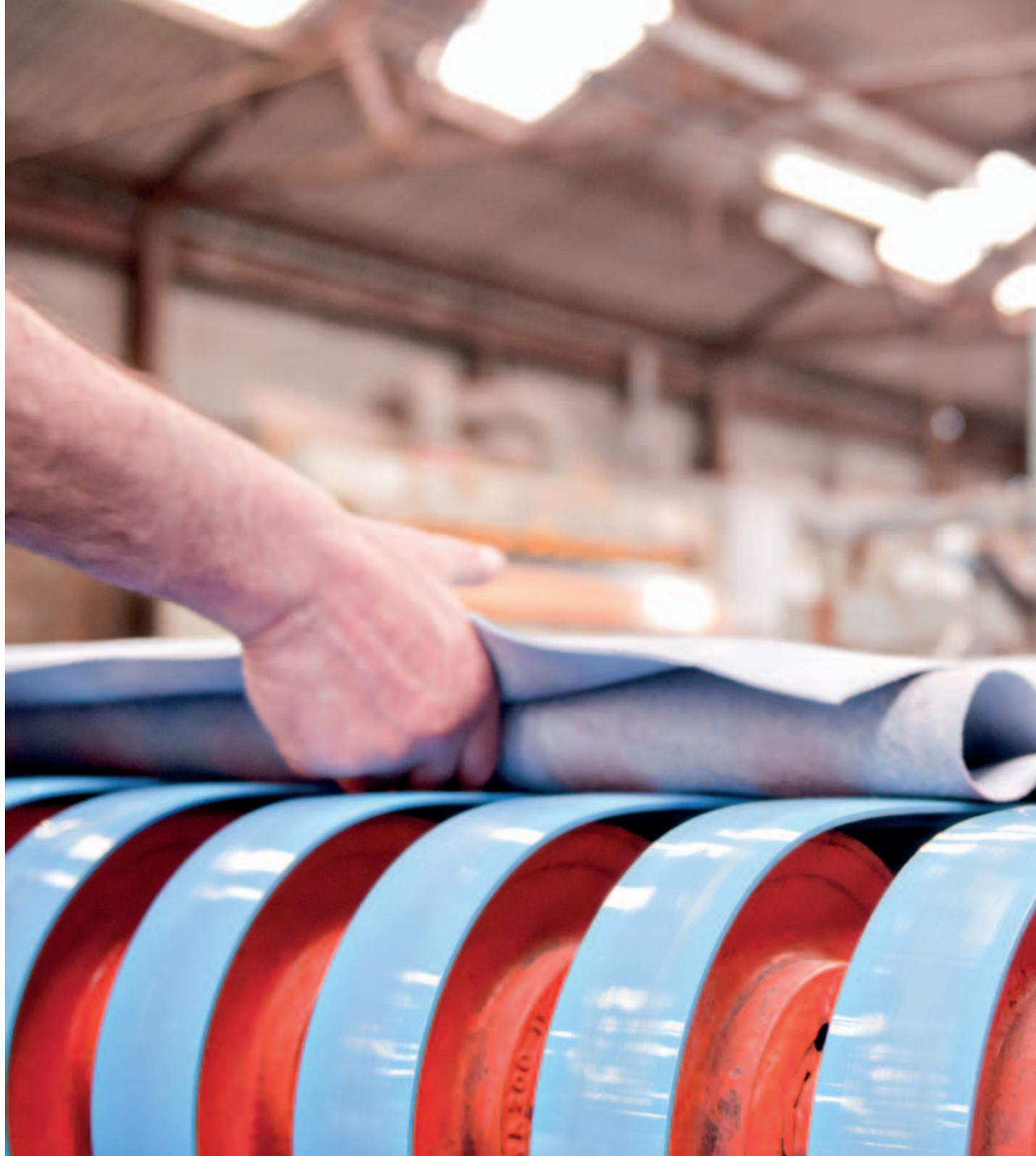


Table 6

IMPACT OF DRIVERS OF CHANGE ON EXISTING OCCUPATIONS: PROFESSIONAL

EXAMPLE PROFESSIONAL OCCUPATION	REGULATION AND GOVERNANCE	DEMOGRAPHIC AND POPULATION CHANGE	ENVIRONMENTAL CHANGE
Textile Laboratory Technician	Understanding of rules and regulations concerning fibres, chemicals and other material and their requirements. Need to make these commercially compliant with rules and regulation. There is also a requirement understand IP.	Increasing demand for TCLF products that cater for a widening demographic and ageing one requires the development of materials, products and applications relevant to these groups.	Environmental regulations regarding the use and application of chemicals as well as the sustainability of TCLF production has seen this group being very important in developing these products and services.
Footwear Quality Control Laboratory Technician	Needs to understand the rules and quality requirements concerning international standards of production and materials.	Increasing demand for TCLF products that cater for a widening demographic and ageing one requires the development of materials, products and applications relevant to these groups.	Environmental regulations regarding the use and application of chemicals as well as the sustainability of TCLF production has seen this group being very important in developing these products and services.
Organisational and Methods Technician	Requires an understanding of legislation and requirements concerning all aspects of production to ensure plans are compliant.	Changes in the demographic of the workforce requires plans to be made that takes this into account, in many cases building in flexibility to ensure skills can be utilised efficiently.	Ensuring plans take into account environmental drivers and legislation is of paramount importance, both from a sustainability and a marketing perspective.

ECONOMICS AND GLOBALISATION	TECHNOLOGICAL CHANGE	VALUES AND IDENTITIES	CONSUMER DEMAND
<p>Sourcing decisions have to take into account global prices and where materials required can be procured from as well as where materials and chemicals can be sourced from to the required quality.</p>	<p>Scientific advancements means professionals are working within a constantly changing environment where skills to identify and work with new processes and materials are of great importance.</p>	<p>STEM students are required within the sector. This means textile laboratory technicians are in big demand. Textile Laboratory Technicians also need to be aware of company procedures to ensure their products meet the standards and style of production required.</p>	<p>Textile lab techs need to be aware of the designs created and the requirement of this. Within technical textiles are often innovative in their application, improving or revolutionising existing processes. Therefore demand is stimulated by making commercially viable improvements to the status quo.</p>
<p>An understanding of sourcing decisions and how this impacts on quality of production and environmental concerns.</p>	<p>Scientific advancements means professionals are working within a constantly changing environment where skills to identify and work with new processes and materials are of great importance.</p>	<p>STEM students are required within the sector as innovative development in processes and procedures concerning footwear production are made.</p>	<p>With the market for footwear so specialised and the emergence of niche markets side by side with design-led requirements, this requires an understanding of what designs will meet various demands.</p>
<p>Working environments have to consider the markets in which the firm operates in, ensuring the advantages of the sector can be realised efficiently and profitably.</p>	<p>Scientific advancements means professionals are working within a constantly changing environment and the need to utilise these advantages are required.</p>	<p>As the sector builds a narrative around superior design and production, so the working environment needs to reflect this.</p>	<p>However the business is organised and processes that are undertaken, these must take into account consumer demand and ensure products are brought to market within margin.</p>

ASSOCIATE PROFESSIONALS

Within the TCLF sectors, associate professionals are most closely related to design, sourcing and research and development functions. These are therefore important roles for the sector in terms of promoting innovation, creativity and ensuring processes are executed to give European designed TCLF products their market advantage and desirability. Examples within the ESCO classification include:

Clothing Product Designer

A clothing product designer develops products for manufacture and prepares designs and specifications of products for mass, batch and one-off production.

Clothing product designers require a number of skills and competences within their job role. These include understanding trends and market requirements, the properties of materials as well as possessing the creativity to produce designs that appeal to markets. Designers also require practical skills such as the creation of precise master patterns for production of garments, and the ability



to mark, cut, shaping and trim textile materials according to blueprints or specifications in the manufacture of garments. Designers can also be required to use a number of computer aided design packages as well as possessing freehand drawing techniques.

Textile Technologist

Textile technologists are responsible for managing production to ensure the timely delivery of orders with correct specifications. In this respect, production can involve short runs with continual testing involving a wide range of raw materials that require specific competences, closely monitoring and flexibly adjusting the production process where required whilst giving instructions to ensure constantly high work quality.

Textile Technologists may therefore be required to source fabrics that are fit for purpose and conduct quality control tests for properties such as crease resistance. They experiment with dyeing and production processes and communicates with suppliers to get the right fabric at the right price.

Textile Technologists often work in a supervisory or management capacity, running a team of people. They may work in production, quality control, sourcing or research and development teams. Textile Technologists often work in-house for clothing companies, conducting research and sourcing fabrics to meet a brief. They may also support the buying, marketing and sales teams within the company.

Increasingly, textile technologist require expertise on, managing budgets, in co-operation with the financial department, following up on quality and return to ensure fault tolerances will drop to zero; detecting the cause of complaints, implying a customer friendly and commercial approach when dealing with clients; and an understanding and application security and environment regulations and a strict application of the quality review system.

Table 7

IMPACT OF DRIVERS OF CHANGE ON EXISTING OCCUPATIONS: ASSOCIATE PROFESSIONALS

EXAMPLE ASSOCIATE PROFESSIONAL OCCUPATIONS	REGULATION AND GOVERNANCE	DEMOGRAPHIC AND POPULATION CHANGE	ENVIRONMENTAL CHANGE
<p>Clothing Product Designer</p>	<p>Need to understand clearly how design decisions impact regulation and governance and sourcing decisions.</p>	<p>Designers are required to design based on their customer requirements. This plays heavily with demographics.</p>	<p>With consumer awareness of CSR and the environmental agenda, sourcing, production and material decisions are often required to take this into account.</p>
<p>Textile Technologist</p>	<p>Textile technologists have to be aware of legislation regarding the trade of materials as well as material properties and legislation regarding these.</p>	<p>Understanding the needs of consumers and the most appropriate solutions based on an ageing population requires understanding.</p>	<p>Textile technologists are required to take into account both the environmental implications of sourcing decisions but also production processes.</p>

 Table source: ESSC

ECONOMICS AND GLOBALISATION	TECHNOLOGICAL CHANGE	VALUES AND IDENTITIES	CONSUMER DEMAND
<p>Understanding the market for design is important for consumers. These forces also influence production and sourcing decisions that a designer plays a key role within.</p>	<p>Technological change has allowed designers to innovate with new styles and techniques. Harnessing technology has been an important process for designers.</p>	<p>European design is world renowned and as such, the importance of the narrative of the brand is crucial to European designers and how they develop their lines.</p>	<p>Most crucially, many designers have to produce products that satisfy consumer demand. This requires an understanding of trends and how their designs can offer differentiation.</p>
<p>A key part in a textile technologists role are sourcing decisions as materials availability, timescales and cost differs by nation or region.</p>	<p>The increasing technological advances in materials and applications increases the needs to understanding of these as well as ensuring the competences of staff are up to date.</p>	<p>The increasing technological advances within the sector requires an understanding by technologists how advances play within the company direction.</p>	<p>Technical technologists job is crucial as not only do they work to meet sector demand, the innovative nature of their role also means they are looking to create demand</p>

SKILLED TRADES

Skilled trades in relation to the TCLF sectors are the backbone of the sector. These jobs require high levels of skill learnt and refined over many years to produce TCLF products to a high standard, with European craftsmanship recognised as world leading. Examples within the ESCO classification include:

Garment and Related Patternmaker

A garment and related patternmaker creates precision master patterns for production of garment. A major part of this role is interpreting a designer's sketch and making a pattern to form the basis of a garment. This role therefore requires a holistic number of skills that include the technical ability associated with pattern cutting, the understanding of material properties through to process control and collaboration with design and manufacture.

Computer packages are commonly used to create the pattern pieces, but some pattern cutters still work by hand whilst others will use a combination of both.

Weaver⁹

Weaver works within the textiles industry, using either traditional hand-loom or highly technical computerised weaving looms to create woven fabrics. Hand-weaving looms are physically demanding to use. Weavers may also be involved in programming and operating computerised machines which are more commonly used in modern factories as they can work at very high speeds. A Weaver also makes sure the machines are running to capacity and must identify any problems quickly and efficiently. In the future as materials and technologies continue to evolve, a weaver will be more faced with other/new raw materials and the testing of new products.

Knitter¹⁰

A knitting machine can be manually or computer-operated and programmed to produce a certain type, quality and size of material. It produces long lengths of tubular or flat fabric for making clothes, accessories and/or technical textile products.

Knitting Machinists need to make sure their

machines have a constant supply of yarn and that they run smoothly. They may need to deal with basic technical problems and perform routine cleaning.

Large manufacturers may have hundreds of machines running at the same time, while smaller companies may employ knitting machinists to produce individual, handcrafted items. They are also required to work the machines that turn natural or man-made yarn into fabric or garments. Additionally, they require being able to use many kinds of knitting machines.

Leather Craftworker

A leather craftworker usually works from a hand or computer-drawn design pattern to hand cut leather pattern pieces. These are then joined together using hand, machine techniques or glues. The craftworker then attaches linings, buckles and eyelets before applying a finish, such as a stain, wax or polish.

Using traditional tools and methods to create

Table 8

IMPACT OF DRIVERS OF CHANGE ON EXISTING OCCUPATIONS: SKILLED TRADES

products such as clothing, footwear and accessories, working with different types of materials including cowhides, nubuck, chamois and suede and using patterns to create items

A leather craftworker may specialise in one or multiple parts of the production process. Some leather goods manufacturers, particularly in footwear, employ people to assemble all the pieces together, as well as Fitters, who attach linings, zips or handles.

EXAMPLE SKILLED TRADE OCCUPATIONS	ECONOMICS AND GLOBALISATION	TECHNOLOGICAL CHANGE	CONSUMER DEMAND
Garment and Related Patternmaker and Cutter	Need to understand clearly how design decisions impact regulation and governance and sourcing decisions.	Designers are required to design based on their customer requirements. This plays heavily with demographics.	With consumer awareness of CSR and the environmental agenda, sourcing, production and material decisions are often required to take this into account.
Weaver			
Knitter			
Leather Craftworker			

 9-10 Based on the Creative Skillset definition
Table source: ESSC

PLANT AND MACHINE OPERATORS AND ASSEMBLERS

Plant and machine operators within the context of the EU-TCL sectors are of high importance, ensuring their role in creating TCLF products ensures they are manufactured to a high standard. These occupations require a large amount of skill and attention to detail to ensure products meet these requirements. Examples within the ESCO classification:

Pattern Making Machine Operator

A pattern making machine operator both operates and monitors machines which make different clothing products and/or products related to clothing. This role requires the operator to have an understanding of the pattern required, creating pre-run samples to ensure the specification meets requirements and ultimately ensuring production meets the specified needs. The role also requires the operator to make decisions on grading once the pattern is complete to ensure quality standards are maintained.

Sewing machine operator

Sewing machine operators operate and monitor

sewing machines to make, repair, darn and renovate garments or related products. Tasks can include operating and monitoring sewing machines to make, repair, darn and renovate garments to operating various other machines such as buttonhole making and eyelet holing machines to cut holes, stitch around holes, stitch buttons and fix eyelets to garments. These tasks can involve the whole garment or to be assigned specific parts to work on.

Sewing machinists can either be expected to use standard sewing machine equipment as well as automated machines where articles for assembly are loaded and monitored as the machines complete the process.

Leather Production Machine Operator

Leather production machine operators use tannery machinery and programme these according to the specific requests depending on the requirements for the leather produced. The role requires the operator to routinely maintain the machinery used and to check the results after machining by grading

the work checking for defects to ensure quality is maintained.

Skills required for this job include understanding the requirements of the design and production needs and setting the machinery accordingly. Having manual dexterity and a degree of physical ability to work with high quantities of leather are essential.

IMPACT OF DRIVERS OF CHANGE ON EXISTING OCCUPATIONS: PLANT AND MACHINE OPERATORS

 Table source: ESSC

EXAMPLE PLANT AND MACHINE OCCUPATIONS	ENVIRONMENTAL CHANGE	TECHNOLOGICAL CHANGE	CONSUMER DEMAND
Pattern making machine operator		Pattern making machines are improving as technology further impacts the IT skills required by workers to operate these machines.	As European manufacture is well regarded and based on high quality production, this requires the role to ensure production is of excellent standard.
Sewing machine operator		As consumers demand more and more styles, this means sewing machinists have to be adaptable to the new technologies within sewing machining that are possible.	As European manufacture is well regarded and based on high quality production, this requires the role to ensure production is of excellent standard.
Leather production machine operator	Minimising wastage within the leather production process is of key concern. It is therefore a required skill to ensure as much of the raw material is used.		As European manufacture is well regarded and based on high quality production, this requires the role to ensure production is of excellent standard.
Leather Craftworker	Need to understand clearly how design decisions impact regulation and governance and sourcing decisions.	Need to understand clearly how design decisions impact regulation and governance and sourcing decisions.	Need to understand clearly how design decisions impact regulation and governance and sourcing decisions.

ELEMENTARY OCCUPATIONS

IMPACT OF DRIVERS OF CHANGE ON EXISTING OCCUPATIONS: ELEMENTARY OCCUPATIONS

Whilst the term elementary by definition means routine, within the context of the TCLF sector, these roles are vital in ensuring TCLF products are presented, packaged and handled to the high standard that is required by industry. Examples of occupations within the ESCO classification include:

Presser: Garment and Related Materials (hand and machine)

A hand garment presser can be required to press,

iron to finish a specific section of an item; shape the garment; and/or give the final finishing appearance to the garment by hand or on steam presser. This occupation can work with small batches therefore pressing each garment by hand individually to mass production pressing my machine where a number of articles require loading correctly into a machine to be pressed ahead of distribution.

Warehouse Operative

A warehouse operative is responsible for the warehousing of TCLF related products. Warehouse operatives have to be able to understand stock levels and quantities, ensure products are stored securely, appropriately and in a manner that makes them easy to track. Warehouse operatives therefore require good problem solving, mathematical and organisational skills. The role also may contain elements of physical dexterity.

Table source: ESSC

EXAMPLE ELEMENTARY OCCUPATION	ECONOMICS AND GLOBALISATION	TECHNOLOGICAL CHANGE	VALUES AND IDENTITIES	CONSUMER DEMAND
Presser: garment and related materials (hand)		The increasing use of machines and their changing operating requirements as technology improves requires the operator to be aware and adapt to these needs.	As the brand narrative is important, this means the presentation of garments is too. Therefore, ensuring meeting these standards are vital.	Consumers demand high quality end garments. It is therefore imperative that the processes undertaken by pressers meet these standards.
Warehouse Operative	Warehouse finished and distributed products serve to be optimally organised and managed by more global factors. The greater variety of manufactured products (short runs) and the increase of just in time deliveries requires this role to adjust to this.	Purchasing online has meant there is more emphasis and responsibility of the operative to ensure products are packed, stored and despatched to a high standard.		Products have to be stored to a high standard to ensure they reach the end user to a high standard.

EMERGING OCCUPATIONS WITHIN THE EUROPEAN TEXTILES, CLOTHING, LEATHER AND FOOTWEAR SECTORS

As well as identifying how these drivers of skills demand are affecting the skills required within traditional TCLF occupations using the ESCO classification, there are also a number of emerging occupations that are becoming apparent within the TCLF sectors.

It is important to recognise these changes as many of these new and emerging occupations will inform new taxonomies along with training and skills requirements, vital for providing a competitive

advantage for the European TCLF sectors.

Whilst many of these occupations are still in their infancy of development and therefore taxonomies have not yet been fully developed, examples from across the TCLF sectors in various broad occupational areas. As we have seen, with globalisation, technology and consumer demand driving many of the fundamental changes within the sector, many of these occupations that

are emerging are mostly within management, professional and associate professional levels as business models change and the need to utilise new technologies for both production and process and market opportunities exist. A small example of new occupations emerging within the sector are as follows.



2.4.1

MANAGERS

Fashion Product Manager: A position within the product marketing department, the fashion product manager is responsible for conducting product, competition, market trend and consumer panel data analyses, among others, providing support to the purchasing department for the creation and structuring of the collection, ensuring that the range meets the demands of the market.

E-commerce Manager: As online becomes an integral part of companies' sales techniques, the ability to utilise these new channels is increasingly important to drive sales. In this respect, the ability of companies to offer an appealing online presence and environment for point of entry sales through the internet requires someone who can commercialise these possibilities.

Social Media Marketing and Communications

Manager: The ability to reach markets and potential customers is increasingly wrapped up with the requirements to unlock social media and the ability to target markets and customers. As marketing becomes increasingly boundary less

with technologies allowing companies to transcend traditional marketing boundaries, it allows the power of social media to spread the message of companies, develop peer sharing and with it, create a compelling narrative that increases product visibility and drive sales.

2.4.2

PROFESSIONALS

Process and Production Timeline Analyst: As we have seen the development and changes to fast fashion requirements are continuing to impact the sector to the extent specialist positions are being created. The process and timeline production analyst is responsible for the technical management of a company's production department, carrying out tasks relating to the analysis, forecasting, planning, scheduling, management and control of the production process. They are also required to coordinate tasks performed by the design and production departments, facilitating the relationship between the two areas by translating the design into technical terms. They also report directly to management, whom they regularly brief and present proposals to improve the cost efficiency and operation of processes.

Head of Information Technology: With IT become more and more integral to TCLF companies at all levels of production, supply chain management and sales and marketing, having systems that can deal with this requirements are becoming more

2.4.3

and more fundamental to business success. These professionals are responsible for the optimisation and technical maintenance of organisations' IT systems. The aim of this occupation is to improve business results through the use of information technologies.

Research, Development and Information Textile

Researcher: This professional is responsible for carrying out research projects in relation to new materials, new textiles applications, and developing new technologies for client companies who so request. In other words, this professional is responsible for researching and developing projects at the request of the client. On many occasions, in which client companies do not have their own R&D department, this is a way of outsourcing the development of new products or new textiles applications, while on others, it makes it possible to conduct tests on new materials using machinery that companies do not normally themselves possess (e.g. resistance, ageing tests, etc.).

Product and Process Innovation Systems

Professional: This professional is responsible for innovation in an organisation, in terms of systems, processes and products. Undertake to plan, manage and control the procedures for a Research and Development (hereinafter R&D) Management System, across the board.

ASSOCIATE PROFESSIONALS

Graphic Designer for Textiles: With the narrative and branding of goods increasingly important, this professional is responsible for designing all of the elements that accompany pieces of clothing (labels, posters, etc...) and other elements that contribute to the image of the product. In the case of medium-sized companies, this role is performed within the textile design department, while in larger companies; it may be part of a specific department, such as the graphic design department.

3D Design and Construction Engineer: Whilst 3D printing is beginning to revolutionise many different manufacturing and engineering processes, the cross over technology is starting to emerge within the fashion and textiles sector and specific roles to harness these technologies in the TCLF sectors are beginning to emerge.

2.4.4

SKILLED TRADES

Fashion Product Manager: A position within Assembler for Special Technical Fabrics: With the rise of niche technical markets, occupations are emerging within this area. Technical fabric assembly workers in the textiles and clothing industries are operators who use a variety of (normally technologically advanced) techniques to assemble the parts of textile articles. The job involves a large amount of independence and responsibility, and the professional must apply the necessary techniques and procedures in order to achieve the quality standards required.

2.4.5

OPERATIVES

Digital Printing Machine Operator: Digital printing allows the user to print direct from a computer design straight to the material. As inks, computer design technology and the capacity and the capability of machinery improve, this offers numerous possibilities for manufacturers to work with a variety of materials and applications. This in turn will require individuals with an embedded knowledge of ICT, design skills and an understanding of machinery technology to enable these changes to be made.

Laser Cutting and Assembly Operators: The use of laser technology in both cutting and assembly operations is of increasing importance to the sector and one that is continuing to evolve.

Automatic Cutting System Operator: with the advances in technology allow new automated processes to be developed within the supply chain new occupations to manage these processes are starting to emerge. An example of this is the automatic cutting system operation who manages the complete system for cutting leather which

comprising of automated pattern and leather scanning, interactive nesting and computer controlled cutting. The operator sends files from computer to the cutting machine, places the material to be cut, and performs patterns' nesting unless the machine makes it automatically.

CONCLUSIONS OF PART 2

As we have seen, the TCLF sectors have changed and continue to change significantly as a large variety of drivers shape the sector. Drivers covering all seven areas of employment and skills change have been identified at play within the sector. In this respect, the TCLF sectors could arguably be seen as some of the most transformative when compared to both European manufacturing more widely and also other industrial sectors within the European economy. Many of these drivers offer a number of wide reaching opportunities for the sector and indeed, a renaissance within the TCLF sectors in Europe is underway.

These drivers therefore have had significant impacts on occupations within the sector and the skills and competences required undertaking these roles, all of which are now mapped within the ESCO taxonomy. The changes and evolutions have mainly been observed at managerial and associate professional levels as these occupational groupings have been impacted most by the changes within the production, supply chain and sales and marketing processes. However,

the analysis shows the requirements of skilled trades and operative level trades have never been greater as European manufacturers continue to trade on the competitive advantage afforded by its reputation for quality, innovation and design and ensuring products that come to market meet these expectations.

However, the drivers on the TCLF sectors continue to both evolve and create fundamental change in business models, processes and sales strategies meaning occupations, skills and competences are also constantly adapting with new taxonomies and specialist occupations being created. Many of these are focussed around harnesses new technologies and responding to and stimulating consumer demand, to ensure European TCLF manufacture maintains competitive advantage over producers from other global areas.

All of these opportunities currently on offer to the sector weigh heavily on the education and skills system to allow the European TCLF sector to press home the advantages it currently

enjoys. Employees with the skills to harness new techniques and processes whilst also being able to replace experience highly skills staff approaching retirement and to allow expansion of operations are critical.

How the educational and skills system in partnership with the TCLF industry and governance stakeholders is able to react, adapt and plan for these requirements will be fundamental to whether the sector can reach its full growth potential. Ensuring the next generation of skilled employees is available to drive innovation and growth in an increasingly global environment is paramount.

Coordinated by:



PART 3

INNOVATIVE TOOLS AND PROCEDURES IN EMPLOYMENT/ TRAINING POLICIES IN THE TCLF SECTOR



INTRODUCTION TO PART 3

The ISP's aim was to provide the European Commission with elements that could prove that national observatories form, at a national level, an important source of information and also manage to orientate the work of the European council. The previous parts of the report provided evidence of the valuable contribution of these ISPs as a source of information on the evolution of the sector thanks to the study and the compilation of quantitative data (report 1) and also thanks to the global economic monitoring.

The aim of this 3rd part is to show that the ISPs can also be a source of information for actions to be implemented in companies for the employees and for the vocational training community of the TCLF sector. Indeed, by seizing the problems of the sector that cover a very large area as demonstrated in part 2 which highlighted the 7 drivers showing that the sector is confronted by developing or contributing to the development of tools and methods that aim to answer these problems. These national ISPs have become key players in a sector in full expansion in several

different countries (England, Italy, Spain, Belgium and France).

Therefore questions this section looks to answer include: What are these tools or methods? Which questions do they answer? For which actors? And under which conditions?

Do these national or regional tools correspond to needs in other countries? Can they be shared, used by other countries even at a European level?

To find possible answers to these questions, a specific questionnaire was sent to various partners in July 2014. (Skillset, Ivoc, Cobot, Osservatorio Nazionale Concia, Fundación Tripartita para la Formación en el Empleo). An analysis of the collected data was carried out and resulted in the current part of the report, produced in October 2014. 28 tools and methodologies, considered as best practices have been selected. They have been classified according to the 7 drivers previously defined,

1. Regulation
2. Demographic changes
3. Environmental Changes
4. Economics and globalisation
5. Technological changes
6. Values and identities
7. Consumer demand

Drivers 1 and 4 share similar impacts and therefore identical needs for some tools. We have therefore decided to group them together. We will analyse, for each topic, its impact on skills' needs, and on the existence or not of skills' mismatch or gaps.

Once this classification and explanation is completed, we will present the existing tools which respond to these issues, in 4 points:

1. A brief presentation: In this point, we describe the context of the tool. To which issue does the tool provide a solution?

2. Who developed this tool: The developer may be the observatory but it may also have had help from an external consulting firm. The tool may also been developed by other actors such as a training body, a professional branch or even a school. This point is to show that different actions from different actors can contribute and help to deal with specific issues.

3. Steps of development: This point describes all the different steps that are useful when developing the tool, so that if another country wants to use or to deploy this tool, the country can just follow the various steps.

4. Transferability: This last point is rather subjective but gives an idea of the possibility to transfer this tool at a national or European level.

DRIVERS OF CHANGE: RESPONSES

As stated in the second part of the report, regulation can have important influence on skills supply and demand.

The facilitation and implementation of free trade agreements has directly impacted the sector in Europe.

Much of this regulation and governance has opened the sector up to increasing international competition. With deregulation, this has seen large TCLF employment drops in Europe over the past two decades: production, especially the production of low-end products, moved to countries with lower cost bases.

Therefore, western European countries have had to reconsider their production strategy and reposition themselves within high-end or high-tech markets.

Faced with the globalisation of transactions, TCLF companies have had to transit from a manufacturing culture to a market culture; one that has occurred at varying pace for different companies.

REGULATION / ECONOMIC AND GLOBALISATION

Beyond the social implications that delocalisation has often created in Europe, the outsourcing of production activities has led, in our countries, to the emergence of new, more qualified vocations, some of which now attract a younger workforce. "Support" positions have developed significantly, pushing up total payroll in the sector, despite falling numbers in the workforce.

Thus, the issue in this sector went from being exclusively economic (manufacturing costs) to one of skills (the need for qualified labour).

The role of ISPs like CREATIVE SKILLSET, COBOT; IVOC, ONC, OPCALIA TMC is to help companies managing this transition, through different ways:

- support companies in managing their obligations regarding training or other social aspects
- analyse real work situations and foresee jobs of the future. Thus, ISPs are able to provide a repertoire of all occupations to companies in the sector, outlining the entire list of careers in the division, along with the knowledge, skills and

training required for each. This work has multiple objectives:

- o help as many people as possible to build successful professional careers
- o provide an HRM tool to companies: in fact, today, summarizing and describing careers has become a serious request for companies, while they await this multi-functional management tool used for recruitment, training, mobility, career development, assessment, etc.

TOOL 1

SUPPORT TO ELABORATION OF SOCIAL BALANCE SHEET

COUNTRY:
BELGIUM

ORGANISATION:
IVOC

NAME OF THE TOOL:
SUPPORT OF ELABORATION OF THE SOCIAL BALANCE SHEET

BRIEF PRESENTATION:

The training efforts of the Belgian companies remain below the goals requested by European and Belgian national agreements. According to these agreements companies should, on the basis of the social balance sheet data, spend 1.9% of gross salaries to training. In 2010, this effort was still 1.5% and the provisional figures for 2011 are not much higher. For companies with more than 10 employees, the percentage is 1.7% (all sectors). IVOC support companies in the registration of their training efforts and the composition of their social balance sheet. First they analyse the accounts / balance sheets of previous years and then make suggestions for improvement. As IVOC supports the training in these companies, IVOC has a good view of the data that companies must include in their annual accounts. In 2013, IVOC have done this for 38 companies.

WHO DEVELOPED THIS TOOL/SERVICE:

IVOC

STRENGTHS AND WEAKNESSES:

Time intensive, the available data are rarely complete.

COST OF DEVELOPMENT:

Staff costs only

TRANSFERABILITY:

There are many differences between the registrations of training efforts in the various European member states. This IVOC service is designed for Belgian training law.

ACTIONCOMPÉTENCES

COUNTRY:
FRANCE

ORGANISATION:
OPCALIA

NAME OF THE TOOL:
ACTIONCOMPÉTENCES

BRIEF PRESENTATION:

Human Resource Management (HRM) is intended to identify and develop skills among staff, in order to improve the organisation's efficiency. However, SMEs, which compose most of the TCLF's economic fabric, struggle to employ this type of practice, lacking both time and means. SMEs with less than 300 employees do not generally attain the critical size to design a clearly established HR function.

Enacted by large consulting agencies, best HR practices are generally only applicable to large groups.

Recommended HRM solutions are generally too large and poorly adapted to most very small businesses and SMEs, all the more because implementing these high-end HR practices requires excessive human and financial means from small and medium-sized businesses.

In many SMEs, there is no annual assessment (progress, goals or evaluation report) exchanged between associates and their supervisors. When they do have one, they are not official (no way of tracking notices from associates or supervisors, nor desires for changes, training needs or defining or attainment of related annual goals). Thus, developing the use of information and communication technologies (ICT) presents a real opportunity to deploy this type of practice in SMEs, using collective (and also economic) interfaces, specifically developed FOR THEIR NEEDS.

ACTIONCOMPÉTENCE

is a secure extranet interface to manage jobs and skills but also the social obligations of SMEs: annual interviews, management of professional risks and elaboration of social reports etc...

STRENGTHS:

This solution has made it easier for companies to develop HR tools that are adapted to their needs such as: training plans, job descriptions, HR dashboards, and age pyramids...

WEAKNESSES:

Each company needs to be supported and trained in order to correctly use this tool. Action Compétences requires a real team project.

COST OF DEVELOPMENT:

100 k€ + staff costs

STEPS OF DEVELOPMENT:

A pilot project has been tested from 2009 to the end of 2012 in 50 different companies. This test allowed companies within specific training fields to explore the features of this tool and to help improve it to better meet the needs of small firms, and now it has been developed at a bigger level with 150 firms now using it.

TRANSFERABILITY:

The duplication of the tool is not that easy because of the database translation.

TOOL 3

GEFLOG

COUNTRY:
FRANCE

ORGANISATION:
OPCALIA

NAME OF THE TOOL:
GEFLOG

BRIEF PRESENTATION:

In France, companies have to spend 1.6 % of their payroll on training for the workforce. This amount can be spent directly by the company or paid to a dedicated organisation such as Opcalia.

To manage these expenditures, big companies often use specific software known as Geflog.

GEFLOG is software, accessible via the internet without the requirements for specific configuration, dedicated to training management with specific features such as: management and monitoring of the training plan, forecasting, financial monitoring of the training plan, statistics, management notices, training assessments.

Features:

- Identify training needs
- Build and manage the training plan
- Follow the training actions, and training budgets
- Manage the training plan
- Analyse the training investment
- Transmission of companies requests for making reimbursed training Action by Opcalia

This tool is exclusively dedicated to Opcalia's affiliated companies with more than 100 employees.

STRENGTHS:

This tool is provided at a very low cost for

companies (1000€ per year).

WEAKNESSES:

It requires a project team for Opcalia to support end users and control the smooth functioning of the application (requirements, bugs etc.)

COST OF DEVELOPMENT:

100 k€

STEPS OF DEVELOPMENT:

A pilot project has been tested from 2005 to the end of 2007 in 50 different companies. This test allowed companies within specific training fields to explore the features of this tool and to help improve it to better meet the needs of small firms. Now it has been developed on a larger scale, 100 firms are using it in the THL sector.

TRANSFERABILITY:

There are many differences between training requirements within the various European member states. Geflog is designed for French training law.

STRATÉGIE COMPÉTENCES

COUNTRY:
FRANCE

ORGANISATION:
OPCALIA

NAME OF THE TOOL:
**STRATÉGIE
COMPÉTENCES**

BRIEF PRESENTATION:

In order to face changes in the industry and contribute to securing its employees' professional development, companies must be able to use preventative measures to manage their jobs and skills.

The issue for institutional players in the TCLF sector resides in companies' awareness of this need for preventative management and demonstration of skills.

Thus, tools and procedures have been developed to help companies take heed of these issues, but also to match their own jobs and skills to social, economic, and operational issues that affect them or that characterise the TCLF sector of the regions in which they operate.

Strategie Competences is a thorough digital diagnostic that involves a 3-hour interview between the business executive and an external advisor, and leads to the analysis and delivery of a personalised action plan.

STRENGTHS:

This service is free for Opcalia's affiliated companies and brings a real added value to SME's that have generally no time to get the necessary support on their current situation and for the future.

WEAKNESSES: This service is relatively expensive for Opcalia, not for the electronic device that has been developed but because of the payment of a network of external advisors (around 100).

WHO DEVELOPED THIS TOOL:

Opcalia.

COST OF DEVELOPMENT:

100 k€ per year.

STEPS OF DEVELOPMENT:

Development of the technical tool, listing of the network of external advisors, training of this network to the use of the technical tool, deployment in companies. Today, more than 300 THL companies have benefited of this tool since 2009.

TRANSFERABILITY:

Easy. Just some translation difficulties and the cost of the technical tool development.

TOOL 5

OPCABOX

COUNTRY:
FRANCE

ORGANISATION:
OPCALIA

NAME OF THE TOOL:
OPCABOX

BRIEF PRESENTATION:

In France, companies have to spend 1,6% of their pay roll for the workers training. This amount can be spent directly by the company or paid to a dedicated organization such as Opcalia.

To support or help small companies to manage these obligation Opcalia developed Opcabox.

Opcabox is an extranet dedicated to affiliated companies. This free online tool allows the company to have access to all information related to the management of its training records.

Key features:

- Consult the key figures about your business with Opcalia;
- Enter online applications for financing by Opcalia;
- Calculate the mandatory contribution of the company;
- Receive personalized statements enabling the company to follow its training activity

STRENGTHS:

This tool is free for Opcalia's affiliated companies and enables the digitisation of training file records.

COST OF DEVELOPMENT:

Cost of Staff.

TRANSFERABILITY:

There are many differences between the registration of training requirements within the various European member states. Opcabox is designed for French training law.

1001 LETTRES

COUNTRY:
FRANCE

ORGANISATION:
OPCALIA

NAME OF THE TOOL:
1001 LETTRES

BRIEF PRESENTATION:

The online 1001 Lettres (1001 Letters) program offered by Opcalia, is a refresher on the basics in French, Maths and Computing, while promoting adaptability and professional mobility.

1001 Lettres is a training solution that includes a multimedia tool and personalised support, which helps consolidate fundamental skills (organisation, writing, working safely, communicating instructions, and information processing...) using examples and situations arising from both the individuals work and personal life.

STRENGTHS AND WEAKNESSES:

Educational methods that are based on professional and personal situations.

WHO DEVELOPED THIS TOOL:

Opcalia.

COST OF DEVELOPMENT:

N.A.

STEPS OF DEVELOPMENT:

N.A.

TRANSFERABILITY:

Easy, except for translation problems.

TOOL 7

PUBLIC SUBSIDIES FOR TRAINING PLANS

COUNTRY:
SPAIN

ORGANISATION:
FUNDACION TRIPARTITA

NAME OF THE TOOL:
CALL FOR PROPOSALS FOR PUBLIC SUBSIDIES FOR TRAINING PLANS

BRIEF PRESENTATION:

Every year there are changes in both intersectoral and sectoral regulations. For instance, concerning environmental respect, risks of prevention, imports and exports with an intersectoral scope; raw materials, labelling or production process in specific sectoral branches.

The tool consists of a state-wide call for proposals granting public subsidies to implement training programs as required within every economic sector.

There are various types of training programs: a) intersectoral training programs providing for horizontal skills needed (29 large providers were beneficiaries in 2013); b) sectoral training programs focused on specific sectoral skills needs (301 beneficiaries, 8 for TCLF sector); and c) training programs aimed at gaining occupational certificates (164 beneficiaries).

Training courses must be addressed to employed workers but the participation of unemployed people is also contemplated, especially in the last four years. For example, these programs provide training courses such as: Textile Labelling (10 hours).

STRENGTHS AND WEAKNESSES:

The Joint-Sectoral Committees (CPS) have as a fundamental role to analyse the evolution in their sector. CPS's are composed of social partners who are close to companies and workers and know about labour market requirements.

They then set the agreement concerning the required training program as a reference for their sector.

DIFFICULTIES: Deadlines for managing the calls for proposals are always short and regulations are so strict that sometimes it makes it difficult to identify/propose training programs that are adaptable to the actual companies and workers needs.

WEAKNESSES: Nowadays, the labour market is subject to a situation of permanent change, so it's difficult to forecast the changes in the mid-term and companies tend to stick to training courses aimed at matching immediate needs.

WHO DEVELOPED THIS TOOL:

National Employment Service (SEPE) and Fundación Tripartita.

COST OF DEVELOPMENT:

This call for proposals is financed by the Spanish National Employment Service's budget: 140 M€ in 2013. Intersectoral training programs: 20 MM €, sectoral training programs focused in sectoral skills needs: 92.5 MM, and training plans for gaining occupational certificates: 28.5 MM €. In 2013, a total of € 870,000 were allocated to the TCLF sector.

STEPS OF DEVELOPMENT:

Main steps: Joint-Sectoral Committees set priorities in their sector. The Spanish National Employment

3.2.2

Service publishes the call for proposals and then employers' associations, trade unions, companies and training providers apply for a grant to implement their projects. After a technical analysis the best assessed proposals are selected for funding. Companies conduct the training and report on financial costs incurred. Monitoring and follow up of the training process is performed by the Spanish administration. The last step is the evaluation of effectiveness and efficiency.

TRANSFERABILITY:

It is possible to deploy this tool.

DEMOGRAPHIC CHANGES

Member countries all agree that textile/clothing/leather employees are ageing. In European THC producer-nations, companies are gradually being hit by this on-going demographic shock and its consequences: the disappearance of skills built from many years of experience, which can lead to the disappearance of all or part of a company's asset base.

In this situation, training workers and recruiting qualified labour constitutes a major concern and becomes a priority in maintaining activities and expertise, along with job security.



TOOL 8

BMW – BE A MENTOR IN THE WORKPLACE

COUNTRY:

**PORTUGAL, BELGIUM,
TURKEY, SLOVAKIA,
POLAND, UK**

ORGANISATION:

CTCP (COORDINATOR)

NAME OF THE TOOL:

**BE A MENTOR IN THE
WORKPLACE**

([HTTPS://WWW.BMW-EU.NET](https://www.bmw-eu.net))

BRIEF PRESENTATION:

In Europe, the ageing workforce is a challenge which involves the need to motivate older people to continue to work and learn as well as create professional opportunities for the younger people. This is one more challenge to address by footwear SMEs - to continue integrating older active people with know-how and experience and to promote new opportunities to younger population, fostering the exchange of know-how between older and younger employees.

ON-GOING PROJECT:

Started 2013-10-01 and will end on 2015-09-30
The project BMW – Be a Mentor in the Workplace - promotes the Mentoring methodologies for the interchange of know-how between generations for the benefit of an active ageing and the younger populations employability. This involves the development of mentoring skills for both mentors and mentees, under the perspective of work based lifelong learning.

The project outcomes include:

- a new framework for setting up mentoring within SME's
- a methodology for certifying mentors, including an innovative course for mentors (in SMEs);
- an innovative guide to the mentee to develop an effective mentoring relationship;
- an ICT based training for becoming an e-mentor including a feed-back system to evaluate the

mentoring system/results and the mentoring relationship;
- the mainstreaming of those tools within education and training systems within each country.

The products are delivered in the following languages: English, Portuguese, Dutch, Slovak, Turkish and Polish.

STRENGTHS AND WEAKNESSES:

The project envisages at developing new skills/competences, in mentoring, targeted to people already working in SME and willing to support the career development of younger employees or to support new hires.

WHO DEVELOPED THIS TOOL:

CTCP - (Centro Tecnológico do Calçado de Portugal- Coordinator).

COST OF DEVELOPMENT:

With the support of the Lifelong Learning Programme of the European Commission.

STEPS OF DEVELOPMENT:

Framework to implement mentoring in SME and a guide for mentees already available on the website. E-learning courses for mentors in development.

TRANSFERABILITY:

Multilingual, thought to be transferable.

CONCIATI NEL TEMPO

COUNTRY:
ITALY

ORGANISATION:
ONC

NAME OF THE TOOL:
CONCIATI NEL TEMPO

BRIEF PRESENTATION:

Tanning industry companies and their districts play a strategically important role in the development of the communities in which they operate.

Indeed, the evolution of their role as mere components of the economy to something of a greater social relevance can be seen in a range of initiatives aimed at promoting both the wellbeing of the community and the culture and traditions related to leather.

While paying attention to the needs of all stakeholders, the tanning industry has defined two key lines of action for the future, namely young people and communication, with the goal of promoting Italy's world-leading tanning industry and of disseminating the leather culture within the local communities.

In 2013, there were three initiatives of particular importance: the contest for junior high schools, "Conciati nel tempo"; the pilot project for fifth-graders, "Le belle lettere della pelle"; and the ballet "Il mantello di pelle di drago" (The dragon-skin cape).

Along with their involvement in the promotional activities of a more institutional nature organised by the associations, the individual tanneries are also actively involved in financially supporting cultural initiatives and solidarity efforts by local non-profit organisations.

CONCIATI NEL TEMPO AIMS AT DISSEMINATING:

knowledge about leather and the tanning industry to the younger generations.

This initiative, which falls within the scope of the educational project "Amici per la pelle" established in 2010 and based on an idea by the Santa Croce group of young tanners that was then extended nationally by UNIC, targeted the junior high schools of Italy's leading tannery districts and engaged both students and teachers in the re-interpretation of objects of design from the past.

The only limit to their creativity was to use leather in the creation of their works. 1,200 students from 12 middle schools in the three main tannery districts (4 from each district). 23 firms contributed by providing material for the 50 works created.

After being on display in March in the town halls of the various districts, the works were then presented in Bologna in April in a dedicated area of the Lineapelle event. The awards took place with the participation of the mayors, town councilmen and tanners.

STRENGTHS AND WEAKNESSES:

Dissemination of Knowledge about leather and the tanning industry to the younger generations.

Main objectives of the tool:

- discover the value of the product "Leather" developing concepts of ethical and social environment.

TOOL 10

- To learn the history, the process of manufacture, the curiosity and the uses of the skin in a practical and funny way;

- Stimulate the manual, the senses and creativity through engaging activities and workshops;

COST OF DEVELOPMENT:

Personnel Cost / Travel Costs/ Organizational Costs.

STEPS OF DEVELOPMENT:

At the local level are organized LESSONS with students of the involved schools (Leather production process)

-Guided visits to industries and treatment plants;

-Creative workshops for the production of leather goods from the students;

-Exhibition of works at the leading trade fair for the sector (LINEAPELLE) .

TRANSFERABILITY:

It could be interesting for the whole TCLF SECTOR.

THE FASHION AND TEXTILES APPRENTICESHIP FRAMEWORKS

COUNTRY:

UK

ORGANISATION:

CREATIVE SKILLSET

NAME OF THE TOOL:

**THE FASHION
AND TEXTILES
APPRENTICESHIP
FRAMEWORKS**

BRIEF PRESENTATION:

Apprenticeship schemes are the main mechanism through which public funding for vocational training within the four nations of the UK is allocated (each within the guidelines of their respective governments.)

Apprenticeships give the individual the opportunity to get their foot on the career ladder, to earn and learn, and to gain a recognised qualification. For the employer, it allows them train their staff on the job, learning the companies working practices as they acquire new skills.

Within Fashion and Textiles , in England at Level 2, there are nine recognised pathways that cut across the fashion and textiles sector. These include; Apparel, Textiles, Footwear, Leather Goods, Saddlery, Laundry, Dry Cleaning, Leather Production and Textile Care Services.

At Level 3, there are seven pathways available in; Apparel, Textiles, Footwear, Leather Goods, Saddlery, Tailoring, Leather Production.

Scotland has an Modern Apprenticeship framework at Level 2 and 3 called Fashion and Textiles: Heritage whilst Wales has recently successfully piloted the Fashion and Textiles Apprenticeship.

At Level 4 (equivalent to first year of a degree course) in England, there are two further pathways in Technical Textiles and Product Development and Sourcing.

In 2012/13, there were 150 starts on Fashion and Textiles Apprenticeship schemes in England and 187 in Scotland. Further information can be found here:

<http://www.apprenticeships.org.uk/types-of-apprenticeships/retail-and-commercial-enterprise/fashion-and-textiles.aspx>

WHO DEVELOPED THIS TOOL:

Creative Skillset.

COST OF DEVELOPMENT:

Substantial costs are incurred to develop Apprenticeship schemes. These include the development of the standards and course development with a number of stakeholders including employers, the Awarding Body and the National Apprenticeship service.

STEPS OF DEVELOPMENT:

Firstly there is a requirement to make a business case for the Framework and individual pathway development. This is done by undertaking feasibility research by obtaining employer support and evidence from research on the need. Standards and learning are then developed with employers to the standard required by both the awarding and funding bodies to ensure they are compliant.. The apprenticeship also requires employers to take up the offer whilst providers have to be found who are in a position to deliver the Apprenticeship provision in this area..

TRANSFERABILITY:

Apprenticeships would require standardisation across all participating countries, which would be difficult given Apprenticeships are geared towards respective UK national government requirements and the differences in standards, funding and policy across European nations. They are also resource intensive undertakings to develop.

TOOL 11

SHOE FUTURE

COUNTRY:

**SLOVENIA, ITALY, CZ. REP.,
GERMANY, PORTUGAL**

ORGANISATION:

**IRCUO, ARS SUTORIA,
ISC-GERMANY, TOMAS
BATA UNIVERSITY, CTCP**

NAME OF THE TOOL:

**EDUCATION OF
NEW GENERATION
OF LEATHER AND
FOOTWEAR EXPERTS**

WWW.SHOE-LEARN.COM

BRIEF PRESENTATION:

The main problem that this project has addressed is the lack of quality education programs in leather and footwear sector.

The SHOE FUTURE project is targeted to develop the competence of specific expert profiles which provide added value knowledge in the process of product development and manufacturing where there are no formal educational activities at secondary and tertiary level for the sector.

This is the case in many countries in Europe, where relevance in terms of Footwear Manufacturing. Footwear industry has reached the point, where the old generation is retiring and a new generation of young people are appearing to replace them. Therefore; the project will focus on developing knowledge and competence for the following crucial profiles:

- (1) Footwear technologist,
- (2) Shoe designer,
- (3) Last developer,
- (4) Soles developer,
- (5) CAD expert for shoe modelling,
- (6) Quality manager.

WHO DEVELOPED THIS TOOL:

IRCUO (Slovenia - Coordinator), ARS Sutoria (Italy), ISC-Germany (Germany), Tomas Bata University (CZ. Rep.), CTCP (Portugal).

The project outcomes include:

- 1 – In-depth analysis of education need
- 2 - Specialized curriculums for each expert profile
- 3 - Specialized handbooks covering specific education contents
- 4 - 1-3 days in-depth education seminars on specific topic (in Slovenia)
- 5 – Up-grade of existing central web page for education in leather and footwear sector – www.shoe-learn.com.

COST OF DEVELOPMENT:

With the support of the Lifelong Learning Programme of the European Commission.

THE CLOAK OF THE DRAGON LEATHER

COUNTRY:
ITALY

ORGANISATION:
ONC

NAME OF THE TOOL:
THE CLOAK OF THE DRAGON LEATHER

BRIEF PRESENTATION:

TANNING industry companies and their districts play a strategically important role in the development of the communities in which they operate.

Indeed, the evolution of their role as mere components of the economy to something of a greater social relevance can be seen in a range of initiatives aimed at promoting both the wellbeing of the community and the culture and traditions related to leather.

While paying attention to the needs of all stakeholders, the tanning industry has defined two key lines of action for the future, namely young people and communication, with the goal of promoting Italy's world-leading tanning industry and of disseminating the leather culture within the local communities.

In 2013, there were three such initiatives of particular importance: the contest for junior high schools, "Conciati nel tempo"; the pilot project for fifth-graders, "Le belle lettere della pelle"; and the ballet "Il mantello di pelle di drago" (the dragon-skin cape).

Along with involvement in the promotional activities of a more institutional nature organised by the associations, the individual tanneries are also actively involved in financially supporting

cultural initiatives and solidarity efforts by local non-profit organizations.

This ballet depicted the charm of leather and featured a prologue dedicated entirely to leathercraft working and to the story of a magic tannery where a dragon-skin cape was made. The ballet was based on stories contained in the book *La magia della pelle nelle fiabe* (The magic of leather in fairytales), which was given to elementary schools in the leading tannery regions, reinterpreted in dance by ballerinas dressed in marvelous leather costumes.

In 2013, this important cultural and promotional event was presented at Teatro dal Verme in Milan, Teatro Comunale in Vicenza, and Teatro della Pergola in Florence in front of 2,000 spectators

STRENGTHS AND WEAKNESSES:

Communication - Cultural and promotional event.

COST OF DEVELOPMENT:

N.A.

STEPS OF DEVELOPMENT:

N.A.

TRANSFERABILITY:

Difficult.

TOOL 13

WATCH (WORKABILITY ACTIONS IN TEXTILES, CLOTHING AND UPHOLSTERY)

COUNTRY:
BELGIUM

ORGANISATION:
IVOC AND COBOT

NAME OF THE TOOL:
WATCH (WORKABILITY ACTIONS IN TEXTILES, CLOTHING AND UPHOLSTERY)

BRIEF PRESENTATION:

IVOC and COBOT joined forces to tackle the theme of workability. In addition to analysing workability, the project builds on existing tools. Indeed, the project partners wanted to set up an initiative departing from existing tools and instruments being used.

After all, many tools have been developed previously in Flanders/Belgium and made available physically or virtually to interested parties. Even abroad, such instruments are developed with IVOC collecting these tools and offering them to companies, in the framework of an action plan (training, financial incentives, workshops).

STRENGTHS AND WEAKNESSES:

The project is under development and is promising.

WHO DEVELOPED THIS TOOL:

IVOC and COBOT

COST OF DEVELOPMENT:

The project is financed by European funds. An amount of EUR 150,000 is involved.

STEPS OF DEVELOPMENT:

- Step 1: Tool inventory
- Step 2: Testing the Tool
- Step 3: Tool offering
- Step 4: Evaluate

TRANSFERABILITY:

The tool might be transferable. Although abroad numerous workability tools have been developed. IVOC would like to test and use them first in Belgium.

EXTENDING OF THE CAREER

COUNTRY:
BELGIUM

ORGANISATION:
IVOC

NAME OF THE TOOL:
**EXTENDING OF THE
CAREER**

BRIEF PRESENTATION:

The ageing of the textile workforce is increasing. 37% of the Belgian textile workers are older than 50 years.

Measures to extend the careers of workers (career of at least 40 years and over). Efforts to make the work more workable. E.g. reducing stress, increasing the motivation of older.

WHO DEVELOPED THIS TOOL:

The federal government.

COST OF DEVELOPMENT:

N.A.

STEPS OF DEVELOPMENT:

N.A.

TRANSFERABILITY:

N.A.

TOOL 15

PILOT'ÂGE

COUNTRY:
FRANCE

ORGANISATION:
OPCALIA

NAME OF THE TOOL:
PILOT'ÂGE

BRIEF PRESENTATION:

Pilot'age is an excel device aiming to analyse the ageing profile of companies and anticipate changes in their payroll in order to improve companies HR and recruitment policies.

Features of this software:

- Creates and the age structure representing the company

- Quantifies variations in the number of workers within the company over the past five years and highlights the major factors contributing to its variations: retirement, recruitment, dismissals and resignations.

- Anticipates variations for the next years. This information helps the company to identify recruitment needs, to ensure the sustainability of the work teams and to implement the training plan required for the proper transfer of knowledge and skills.

STRENGTHS:

Pilotage is an easy tool to develop (excel files) and to deploy.

WEAKNESSES:

Companies have to communicate their employees' data (date of birth) to use this tool.

WHO DEVELOPED THIS TOOL:

Opcalia.

COST OF DEVELOPMENT:

1000 euros.

STEPS OF DEVELOPMENT:

N.A.

TRANSFERABILITY:

Easy.

CAREER ADVICE AND IAG

COUNTRY:
UNITED KINGDOM

ORGANISATION:
CREATIVE SKILLSET

NAME OF THE TOOL:
CAREER ADVICE AND IAG

BRIEF PRESENTATION:

Creative Skillset has created a vast resource of information aimed at raising the profile of the sector and attracting new recruits. The IAG information helps to bring to attention the opportunities that exist in a sector that can be fairly hidden from the public's conscience and where exciting opportunities currently exist.

Creative Skillsets website

http://creativeskillset.org/creative_industries/fashion_and_textiles includes information aimed at raising the profile of the sector. Initiatives include:

- 77 job profiles that cut across the sector in all TCLF industries at all levels of work to allowing individuals to understand what career opportunities in the sector are available, information on the roles and salaries. http://creativeskillset.org/creative_industries/fashion_and_textiles/job_roles

- 17 case studies with people working within the sector, explaining more about their job, how they got started and progression routes. These case studies include stories from apprentices, managing directors, designers, textile technologists and trainers. http://creativeskillset.org/creative_industries/fashion_and_textiles/real_life_stories

- A glossary of useful organisations with links to their websites for further information that can help you to get started with a career in the sector.

WHO DEVELOPED THIS TOOL:

Creative Skillset.

COST OF DEVELOPMENT:

Costs related to staff time to conduct the careers research, identify case studies and to develop the products and information for deployment on the Creative Skillset website.

STEPS OF DEVELOPMENT:

A matrix of job roles across the Creative Skillset's fashion and textiles footprint and sub-sectors were identified. These job roles were then researched and developed into profiles. The case studies were conducted with industry employees, with a number of suitable case studies identified across the fashion and textiles sector. These were then conducted and a narrative written. The completed works were then made web ready for publication.

TRANSFERABILITY:

the development of case studies and job profiles requires a lot of scoping and researching although the initial work has been done and would only require contextualising. The end product can be easily developed for web which would be beneficial to current ISP and EU-TCLF technology.

TOOL 17

SPECIFIC PROGRAMME TO IMPROVE THE EMPLOYABILITY, QUALIFICATION AND PROFESSIONAL INSERTION FOR YOUNG PEOPLE

COUNTRY:
SPAIN

ORGANISATION:
FUNDACION TRIPARTITA

NAME OF THE TOOL:
SPECIFIC PROGRAMME TO IMPROVE THE EMPLOYABILITY, QUALIFICATION AND PROFESSIONAL INSERTION FOR YOUNG PEOPLE (LESS THAN 30 YEARS OLD)

BRIEF PRESENTATION:

The ageing working population in Spain and in the TCLF sector is worrisome. If the trend does not reverse, it will have a very detrimental effect on the sectors ability to skill up and transfer high level skills, which stands up among the best in the world sector.

Unemployment in Spain is focused on youth population and within all sectors, so that any initiative aimed at facing such a problem should be properly contemplated.

The tool consists on a state wide call for proposals granting public subsidies to implement training programs focused on the acquisition of skills required by occupations with the best employment prospects.

There are various types of training projects: practices in companies, training and hiring commitments, occupational aptitude certificates and language or technologic skills. Projects must be focused on young workers, especially on low-skilled or unemployed people.

STRENGTHS AND WEAKNESSES:

Strengths: The tool is focused directly to young workers in situation. Difficulties: Deadlines for managing the calls for proposals are always short and regulations are so strict that sometimes it makes it difficult to identify/propose training adapted to the actual companies and workers needs. WEAKNESSES: The call for proposals is

only for sectors where the employment level is rising, so each year there are a few sectors that can't participate.

WHO DEVELOPED THIS TOOL:

National Employment Service (SEPE) and Fundación Tripartita.

COST OF DEVELOPMENT:

This call for proposals is financed by the National Employment Service's budget: 41,5 M€ in 2013.

STEPS OF DEVELOPMENT:

Main steps: The Spanish National Employment Service publishes the call for proposals and then employers' associations, trade unions, companies and training providers apply for a grant to implement their projects. After a technical analysis the best assessed proposals are selected for funding. Companies do the training and report on financial costs incurred. Monitoring and follow up of the training process is performed by the Spanish administration. The last step is the evaluation of effectiveness and efficiency.

TRANSFERABILITY:

It's possible to deploy this tool.

ENVIRONMENTAL CHANGES

The environmental changes which have impact on the TCLF sectors consist in several aspects:

- whilst cost is still the most important point for many customer, we can observe an increasing awareness on the environmental topic that contributes to changing consumption habits.
- the European or national regulation, for instance through measures such as REACH or government initiatives about recycling, that are often stronger than international regulation, having a strong impact on European companies business models. This requires manufacturers to come up with innovative materials and production techniques and so on to develop higher skills.
- significant increase in the cost of raw materials especially due to climate change and making raw material markets unpredictable, requires both very strong skills in supply chain, and in economical forecast, in adaptability.



TOOL 18

SUSTAINABILITY REPORTS

COUNTRY:
ITALY

ORGANISATION:
ONC

NAME OF THE TOOL:
**SUSTAINABILITY
REPORTS**

BRIEF PRESENTATION:

These are published by Italian tanneries and members of the Italian Tanneries Union (UNIC – Unione Nazionale Industria Conciaria), since 2003 and is an internationally unparalleled example of excellence in social and environmental conduct. The historical data confirms the industry's capacity for innovation that drives all of the industry's markets.

The report is now centred around "sustainability" as defined by the UN in 1987 (see the report of the WCED, "Our Common Future").

The leather industry in Italy is strategic importance to the nation.

In 2012, levels of revenue kept Italy at the top of the rankings worldwide (at 16% of global revenues and 65% of EU revenues).

Tanneries play an essential role in protecting the environment by using a by-products of the food industry that would otherwise create serious health problems and be very expensive to dispose of. Moreover, Italian tanneries are able to create a product that is universally appreciated whilst following exemplary quality and environmental impact standards.

The tanning process is getting cleaner, consumes less energy, water and chemical substances, and achieves high levels of waste reuse and recycling. The report also underscores the social focus of

the industries businesses, which are primarily organised into geographic districts so as to better promote a culture of hard work and initiative. This also makes the enterprises more competitive and enhances labour relations, as witnessed in the second edition of the UNIC's code of conduct and social responsibility, which has also been signed by the trade unions and is the only document of its kind among industrialized nations.

The code calls for the respect of human rights and working conditions, protection of the environment, development of the community, professionalism in business relations, product quality, and consumer protection.

STRENGTHS AND WEAKNESSES:

The report is a good example of excellence in social and environmental conduct.

WHO DEVELOPED THIS TOOL:

Unic.

COST OF DEVELOPMENT:

Personnel costs /Printing cost/Data collection.

STEPS OF DEVELOPMENT:

N.A.

TRANSFERABILITY:

At EU level (Cotance and Industrial) have developed it.

GRI SUSTAINABILITY PASSPORT FOR WORKWEAR COMPANIES

COUNTRY:
BELGIUM

ORGANISATION:
IVOC

NAME OF THE TOOL:
GRI SUSTAINABILITY PASSPORT FOR WORKWEAR COMPANIES

BRIEF PRESENTATION:

Very important. Innovation and sustainability are in the priority areas of the social partners in the clothing industry.

The social partners have issued an agreement with the Flemish government to take action.

It is listed among the missions of IVOC to support innovation and sustainability in the clothing sector.

Between September 2013 and July 2014 IVOC coordinated a pilot project involving manufacturers of workwear.

They were guided to establish a first sustainability report according to the GRI-standards (<https://www.globalreporting.org>).

The main role of IVOC is with the composition of a template for sustainability reporting that can be used by workwear companies.

This 'GRI sector passport' managed by IVOC is now available. Companies can use this model for their sustainability report. The first three reports were made in 2014

STRENGTHS AND WEAKNESSES:

GRI is one of the possible models.

The multitude of standards causes hesitation and questions whether the efforts are well worth.

WHO DEVELOPED THIS TOOL:

IVOC + external experts.

COST OF DEVELOPMENT:

50,000 euro.

STEPS OF DEVELOPMENT:

Step 1: Make-sector passport

Step 2: Validation of the passport

Step 3: Make sustainability reports based on the passport

Step 4: Validation of individual sustainability reports.

TRANSFERABILITY:

Would not be a problem, except for the translation of the tool (it's in Dutch!)

🔧 TOOL 20

SUSTAINABILITY

COUNTRY:

**SPAIN, PORTUGAL,
ITALY, GERMANY, CZECH
REPUBLIC, ROMANIA,
SLOVENIA AND BELGIUM**

ORGANISATION:

**VARIOUS
STAKEHOLDERS**

NAME OF THE TOOL:

SUSTAINABILITY

(WWW.STEP2SUSTAINABILITY.EU)

BRIEF PRESENTATION:

Environmental change has impact the companies skills' requirement in this sector, specifically with REACH rules within the EU and with Restricted Substances Lists (RSL).

ONGOING PROJECT:

Started 2013-10-01

The main objective of the project STEP to SUSTAINABILITY is to design, develop and pilot a new job qualification profile and associated training on the subject of "Footwear Sustainable Manufacturing", which is able to cope with the visible shortage of vocational skills in the sector. It should also promote the best use of outcomes in the field of materials, machinery and processes as developed in the frame of other European research & development projects focused on sustainability, all of these aimed at improving competitiveness in the footwear sector.

The project activities include:

- Research on training needs based on evidence;
- Identification of competences and skills to implement sustainable manufacturing in footwear with the support of European companies/ universities/technical schools/and other entities;
- Definition of a new qualification profile based on a new research combined with already existing studies on sustainable manufacturing;

- Development of a training program to fit the new qualification profile, according to ECVET (European Credit System for Vocational Education and Training) standards for credit transfers;

- Learning units based on qualifications targeted to the new profile an other people in companies, with association to assessment procedures, transferability, validation and accumulation of learning outcomes achieved in formal, informal and non-formal contexts - integrating ECVET and quality assurance principles EQAVET;

- E-learning course;

- Piloting outcomes reports;

- Quality assessment report;

- Dissemination material and events for exploitation of results.

The planned outcomes will be:

- A report presenting the results of a research study on the innovation and training needs of the European Footwear Industry

- A b-learning course structured in e-learning components and work-based workshops completed with a demo in all languages and a user manual for trainers and coaches.

- A profile of a new expert in sustainability, who can conceive tailor-made strategies for European Footwear companies.

The products will be delivered in the following languages: English, Portuguese, Spanish, Italian, Romanian, Slovenian, Czech, French and German.

STRENGTHS AND WEAKNESSES:

The project envisages at developing new skills/ competences, opening the possibility to embrace new targets for the products, new businesses, with impact on SMEs' competitiveness. B-learning offers a flexible approach to the development of new skills, reaching a wider target-audience.

WHO DEVELOPED THIS TOOL:

CTCP - (Centro Tecnológico do Calçado de Portugal- Coordinator); INESCOP (Instituto Tecnológico del Calzado - Spain); CEC – (Confédération Européenne de l'Industrie de la Chaussure - Belgium) ;TUIasi - Universitatea Tehnica Gheorghe Asachi din Iasi (Romania); ISC - International Shoe Competence Center Pirmasens gGmbH (Germany) ; ARS SUTORIA School s.r.l. (Italy) ; ZAVOD IRCUO –Industrijski razvojni center za usnjarsko in obutveno industrijo (Slovenia) ; Klaveness Portugal, S.A. ; ČOKA - Česká obuvnická a kožedělná asociace (Czech Republic).

COST OF DEVELOPMENT:

With the support of the Lifelong Learning Programme of the European Commission.

STEPS OF DEVELOPMENT:

Profile already developed, training programme in development.

TRANSFERABILITY:

high potential.

3.2.4

TECHNOLOGICAL CHANGES

As with many sectors, the continued advancements in technology have profoundly changed the way the TCLF sectors operates on many levels and in many respects and is a key driver of skills changes.

- Evolution of manufacturing techniques and materials
- The increasing importance of technical textiles
- Growth of specialist manufacturing
- Move towards full knowledge economy and focus on research & development in the TCLF sectors
- Growing importance of online sales, offering opportunities in new market

TOOL 21

TRAINING CONTENTS AND SUPPORT TOOLS FOR E-LEARNING FOOTWEAR DESIGN CAD SYSTEMS

COUNTRY:
**ROMANIA, SPAIN,
PORTUGAL, UK**

ORGANISATION:
**SEVERAL
STAKEHOLDERS**

*(UIASI-GHEORGHE ASACHI TECHNICAL UNIVERSITY OF IASI,
INESCOP-INSTITUTO TECNOLÓGICO DEL CALZADO, IED-ISTITUTO
EUROPEO DI DESIGN, VC-VIRTUAL CAMPUS, RED 21, UNIVERSITY OF
SALFORD)*

NAME OF THE TOOL:
**ONLINE LEARNING PLATFORM
FOR 3D FOOTWEAR
COMPUTER AIDED DESIGN**

BRIEF PRESENTATION:

INGA 3D project aims to transferring and extending the innovative software solutions and the highest 3D technologies for footwear computer-aided design produced by Spain in four complementary ways:

- 1) by transferring the innovation to other countries, namely Romania, Portugal, and UK;
- 2) by developing skills and competencies in 3D footwear computer-aided design which will enable VET professionals (teachers, trainers and tutors) to teach ICT based technical courses for supporting creativity and innovation among VET students/trainees;
- 3) by developing new training contents and supportive tools for e-learning based on units of learning outcomes and competencies in order to ensure effective assessment, evaluation and validation;
- 4) by setting up an Online Learning Platform.

WEBSITE:

<http://www.inga3d.eu/>

USERS:

VET professionals, professionals of the footwear industry.

OUTCOMES:

Training contents, e-learning platform, development of skills and competences of VET professionals.

OBJECTIVE:

providing the footwear sector VET professionals with updated knowledge and competences directed to teach 3D footwear computer aided design

STRENGTH AND WEAKNESSES:

There is a clear gap between the skills/competences of the VET professionals and the skills required for teaching/training ICT based technical courses for footwear industry. As similar to other specific sectors, the level of knowledge update required from the professionals is quite demanding and therefore VET professionals need to have an effective connection both with the industry and with the CAD software company. With this initiative this gap will be reduced. Besides, trainers are usually more focused in the technological aspects rather than in the creative and innovative features. It is necessary to provide them with skills/competencies in order to support creativity and innovation among their students

WHO DEVELOPED THIS TOOL:

Tool in process development by the partners of the project since 2013.

COST OF DEVELOPMENT:

The project is funded by Long Life Learning program of the European Commission

STEPS OF DEVELOPMENT:

At the moment training contents and design of platform development are in progress. Available "Peer learning scenarios on footwear computer aided design report"

TRANSFERABILITY:

The results will be available in 2015

🔧 TOOL 22

MOTIV
(WWW.MOTIVFLANDERS.BE)

COUNTRY:
BELGIUM

ORGANISATION:
IVOC

NAME OF THE TOOL:
SUSTAINABILITY
(WWW.MOTIVFLANDERS.BE)

BRIEF PRESENTATION:

The social partners recognise the need for appropriate knowledge, faster and more efficient translation of scientific results and flexible production processes aimed at smaller parties and mass customisation and an intense collaboration within the supply chain.

IVOC is the leading partner in the consortium MOTIV. MOTIV which is the Dutch abbreviation for Fashion Technological Innovation Forum Flanders. It is a joint initiative of IVOC, the fashion department of the University College Ghent, and all sector organisations in the fashion supply chain (textile companies, chemical companies, wholesale, textile care, ...) With the expertise of these partners, the aim is to bundle all activities around higher education, research and service in favor of the industry.

The partnership has undoubtedly the merit that it includes almost all sectors of the textile chain.

The partnership exists since 2006. Each semester MOTIV is organizing a seminar or a workshop on topics such as innovation, sustainability, technology, for which we invite external experts.

Cooperation within MOTI is the impetus for bilateral projects between the partners.

STRENGTH AND WEAKNESSES:

The partners bring in their own resources and financial means. There is no external funding. This limits the possibilities.

WHO DEVELOPED THIS TOOL:

IVOC and the fashion department of University College Ghent.

COST OF DEVELOPMENT:

Quite limited. The infrastructure for workshops is provided by the partner organizations. There are some costs for catering. Furthermore, there are of course the personnel costs. The MOTIV budget is about 4.000 euro per year.

STEPS OF DEVELOPMENT:

The partners meet regularly

TRANSFERABILITY:

N.A.

THE TICK

COUNTRY:
UNITED KINGDOM

ORGANISATION:
SKILLSET

NAME OF THE TOOL:
THE TICK

BRIEF PRESENTATION:

The Creative Skillset Tick is a mark of quality indicating the courses and apprenticeships best suited to prepare you for a career in the Creative Industries.

For a course or apprenticeship to be awarded the Creative Skillset Tick, they will have undergone a rigorous assessment process conducted by experts working in the Creative Industries. They only give the Tick to those courses and apprenticeships that have the strongest links with industry ensuring students are given a clear steer on courses that will give them the best start to a career in the sector.

This accreditation allows the course or Apprenticeship to carry the Creative Skillset "Tick" logo and accreditation which makes them an attractive proposition to the student as well as the institution who can attract students onto their courses.

The Tick became available for courses in Fashion and Textiles in 2014, piloted for Fashion Design in 2014 and latterly in the same year became available across the Fashion and Textiles Apprenticeship frameworks and individual pathways. Further information is available here:

<http://courses.creativeskillset.org/>

WHO DEVELOPED THIS TOOL:

Creative Skillset

COST OF DEVELOPMENT:

Substantial costs are incurred to administer the scheme. Creative Skillset have a dedicated team internally who are responsible for "Ticked" courses. These include processing applications, arranging accreditation and re-accreditation assessments, gathering evaluation information on the courses and working to ensure the brand is kept to a high standard.

STEPS OF DEVELOPMENT:

Develop of an understanding of in-scope courses, work with industry to develop criteria for assessment and build an internal infrastructure to administer and develop the courses.

VALUES AND IDENTITIES

The TCLF sector is facing a palpable paradox in the five countries under discussion: after experiencing serious economic difficulties, they have lost a significant part of their workforce (especially in manufacturing) over the last 30 years. Meanwhile, as the age pyramid shows, the sector has had difficulty recruiting, and struggled to attract young graduates and those seeking advice and orientation. This situation hampers development, and even redeployment in the sector, since it can translate into non-renewable skill sets. The TCLF sector still suffers an image problem with the broad public which causes difficulties attracting new recruits, especially from younger workers.

- Difficulty attracting STEM graduates into the TCLF industries,
- Recruiting people into the sector with science Technology, Engineering and maths skills are very much key to the industry being able to exploit and realise the potential of advances in technology as well as continuing to maintain the skills for a competitive sector.



PRODIAT

COUNTRY:
FRANCE

ORGANISATION:
OPCALIA

NAME OF THE TOOL:
PRODIAT

BRIEF PRESENTATION:

The professional «work-study» contract PRODIAT is a device designed for SME's that express a real need for a sustainable integration of new employees on "hard-to-fill" jobs and wish to be supported for of all administrative difficulties related to recruitment of «work-study» contract.

This device has been developed since 2007. Its objectives are too help the small businesses, which often do not have sufficient human resources to identify their needs for skills (for instance to build skills standards), and to train tutors who follow the beneficiaries of the "study-work" contract.

The device is based on the establishment of an "external training service" through an external training organisation called "OF architect."

In short, Opcalia pay external consultant (training organization) who provides all the "logistical" steps associated with this device.

- The analysis of the need of the company
- The drafting of the skills template required for the job
- The organisation of recruitment efforts (The writing of the job offers, the analysis of resumes received, the pre-selection of applicants ...)
- Construction of the in-house training for the beneficiary
- The management of administrative tasks
- The periodic evaluation of the employee

STRENGTH AND WEAKNESSES:

The system has several advantages :

- the dropout rate is 5% against 10% for traditional contracts,
- this kind of contract results in a permanent contract for the beneficiary in most of cases (56% against 14% for traditional contracts).
- Prodiat decreases the number of hours of training: on average 320 hours of training for 646 in a classic "study-work" contract. More accurate training, and the precise definition of skills explain this difference in the number of training hours. This reduction of training hours means a reduction in costs to 5,800 euros per Prodiat for a maximum of 500 hours of training, against 6,300 euros for a classic professional contract.

WHO DEVELOPED THIS TOOL:

Opcalia

COST OF DEVELOPMENT:

Opcalia is paying the external consultants (2,400 euros per contracts) and 100% of the cost of the in-house training.

STEPS OF DEVELOPMENT:

N.A.

TRANSFERABILITY:

N.A.

TOOL 25

PEDAGOGICAL KIT

COUNTRY:
FRANCE

ORGANISATION:
OPCALIA

NAME OF THE TOOL:
PEDAGOGICAL KIT

CONTEXT:

L'Observatoire des métiers de la Mode, des Textiles et du Cuir" contributes to a better understanding of the sector and has created a training kit for teachers.

BRIEF PRESENTATION:

This training kit has been designed to provide teachers and students all the key information concerning jobs of the sector. It offers fun facts that will allow to work on these topics.

Thanks to a DVD, teachers can discover the sectors of Textils-Leather Fashion

STRENGTHS:

- Give an insight to the students of the different kind of jobs that exists in our sectors
- Playful and interactive

Weaknesses: It must be updated quite often

WHO DEVELOPED THIS TOOL:

Opcalia

COST OF DEVELOPMENT:

50,000 €

STEPS OF DEVELOPMENT:

- Request proposal
- Selection of the provider

- Drafting of the specification
- Test and launch

TRANSFERABILITY:

easy to do except for the language.

MONCONTRATPRO.COM

COUNTRY:
FRANCE

ORGANISATION:
OPCALIA

NAME OF THE TOOL:
MONCONTRATPRO.COM

CONTEXT:

Opcalia created a platform to link applicants, companies and training bodies together.

BRIEF PRESENTATION:

Moncontratpro.com is a widely access internet website for any person looking for a work study contract.

It's aims is to:

- Facilitate the relationships between applicants, companies and training bodies
- Enhanced the follow up of the contracts by creating a community of actors

STRENGTHS:

- It's free
- Accessible to all companies
- Very easy to use

WEAKNESSES:

It must be updated quite often

WHO DEVELOPED THIS TOOL:

Opcalia

COST OF DEVELOPMENT:

85,000 €

STEPS OF DEVELOPMENT:

- Request proposal
- Selection of the provider
- Drafting of the specification
- Test and launch

TRANSFERABILITY:

Easy to do except for the language.

TOOL 27

TUTEURPRO

COUNTRY:
FRANCE

ORGANISATION:
OPCALIA

NAME OF THE TOOL:
TUTEURPRO

BRIEF PRESENTATION:

Tuteurpro is a distance education programme dedicated to trainees. It has partnership with a training organization called ORT.

Its aims are to:

- ensure optimal integration for the beneficiaries that have a professional contract in the company
- provide tutors all of the teaching and managerial skills that are necessary for the transmission of know-how
- secure the career of the beneficiaries

STRENGTHS:

- sharing experiences
- accessible and adaptable to all companies

WHO DEVELOPED THIS TOOL:

Opcalia

STEPS OF DEVELOPMENT:

- Request proposal
- Selection of the provider
- drafting of the specification
- Test and launch

TRANSFERABILITY:

Easy to do expect for the language

GROUP TRAINING ASSOCIATION

COUNTRY:
UK

ORGANISATION:
CREATIVE SKILLSET

NAME OF THE TOOL:
GROUP TRAINING ASSOCIATION

BRIEF PRESENTATION:

Due to the small size of Fashion and Textiles companies, this makes it difficult for them to access training.

This is alongside the need to co-ordinate and mentor these smaller companies in training and skills development.

Therefore, the national Fashion and Textiles Group Training Association (GTA) based at the Huddersfield Textile Centre of Excellence was launched in 2013 to put companies in control of their training needs, creating strong links between Creative Skillset, employers, training providers and major national sector organisations.

The GTA exists to help make access to training and skills simpler for companies, guiding them through the maze of information that exists and explaining what funding is available across all training and education options.

The Fashion and Textiles GTA:

Provides a single point of contact for anything relating to skills in the industry;

Aims to increase demand for apprenticeship training across the sector

Aims to increase demand for apprenticeship training across the sector;

Employs Network Development Managers to drive

employer engagement and raise awareness of the training and skills provision available in the Fashion and Textiles footprint;

Will create a database of qualified staff, tutors and assessors in the sector with a shared vision for consistent skills training up and down the country;

Accesses funding to support company engagement in skills and workforce development.

It helps by:

- Identifying the right provision and people to build your workforce
 - Accessing shared resources to ensure economies of scale
 - Cutting through the bureaucracy and secure funding
 - Keeping up to date with technological changes
- Further information can be accessed here: <http://fashionandtextiles-gta.co.uk/>

WHO DEVELOPED THIS TOOL:

A wide number of industry partners with the initiative based at Huddersfield Textile Centre of Excellence with the North West Texnet also involved as a partner in delivery.

COST OF DEVELOPMENT:

The GTA initiative required resources that included administrative and staff costs to engage industry and training providers with the concept. A lot of resource is required to work with employers who have not really engaged with training before, talking them through the offer, continually warming them up and finding suitable training which involves working with providers to ensure their offer can cater for these needs..

STEPS OF DEVELOPMENT:

Feasibility and business planning undertaken with structure and resources put into place. Publicity and engagement of employers and providers within the scheme.

TRANSFERABILITY:

Would require large dedicated staffing to achieve this concept. May not work well on a trans-national level where different training regimes are in place.

CONSUMER DEMAND

Within the TCLF sector, trends change daily and meeting consumer demand is paramount to the success or failure of products coming to market. Therefore, it is essential to understand what consumers want and how to make these demands a reality in production and sales.

VLAMT

COUNTRY:
BELGIUM

ORGANISATION:
IVOC

NAME OF THE TOOL:
VLAMT

BRIEF PRESENTATION:

E-commerce is booming. Research in 2014 shows that clothing and shoes are at the top of the list of online purchases. Half of the respondents (a representative sample of the Belgian population) purchased, clothing or shoes over the internet, during the past year

Clothing purchases turn out to be on the rise: more consumers buy clothes and they buy it more often. Fashion is called the main volume generator in e-commerce. It is regarded as a booming business because their prospects are also increasing.

VLAMT is a research method for proactive analysis of future skills needs. The tool is generic. IVOC applies the tool to competency needs in an e-commerce environment. The aim is to review our training offer in the light of the new developments and possibly to offer new training courses.

STRENGTH AND WEAKNESSES:

The procedure is quite heavy and demand commitment from stakeholders. The tool is new - developed in 2012. Therefore too early to evaluate

WHO DEVELOPED THIS TOOL:

The tool was developed by experts commissioned by the Flemish government

COST OF DEVELOPMENT:

The development cost of the tool is not known.

To use the tool in the clothing industry, a budget of 50,000 euro was provided

STEPS OF DEVELOPMENT:

Step 1: planning, defining the focus of the research project, determine the specific approach and the desired output

Step 2: composition expertise unit

Step 3: desk research

Step 4: exploratory strategic workshop with relevant stakeholders from the sector itself and related sectors.

Step 5: in-depth interviews with representatives from the field.

Step 6: analysis of the training offer

Step 7: report with recommendations and action plan.

Step 8: reporting and information dissemination.

FEASIBILITY:

The tool is publicly available. Provided some guidance, you can easily use the tool. Please note, the tool is in Dutch only.

CONCLUSIONS OF PART 3

This report was written as an updated continuation of the first report that was created in 2012 that highlighted tools developed or co-financed by ISPs and other national stakeholders, in order to answer a certain number of HR issues that firms from the sector are confronted to. A total of 27 tools were highlighted. Some of those have been dealt again in the new report although this time, the report analysed 24 tools but in a macro-economic context.

In two years, 51 tools and methods were analysed and highlighted. These tools matched either business problems or macroeconomic issues at a European level.

As these two consecutive reports are based on concrete experiences, the ISP's can therefore use these within different kind of working environments. We can recall the conclusions and the recommendation that were done in the previous report, that the TCLF sector has challenged the employment and training issues to which it is confronted in different countries.

In this sector in rebirth, the social partners have managed to demonstrate their creativity and engagement to deploy adaptable tools and methodologies that have proven their effectiveness in several countries. The results of the development work and the undertakings of the various TCLF ISPs has had the impact of ensuring products are developed that ultimately fit for purpose and improve the skills of the workforce, ensuring firm productivity.

Thus ISP can assign several goals:

- use the multiplier effect of numerous national ISPs to bid for development activities on a pan-European basis that complements and strengthens on-going national level initiatives.
- understanding the work of other ISPs and developing ideas which would work for them within resource.
- facilitate partnerships that ensure national ISPs draw on the work of their equivalents in other

countries, drawing on best practice rather than duplicating effort.

- understand the wider funding routes available for development activities at a pan-Europe level: these tools have important costs and need specific organisation and funds in order to be deployed in other countries.

In short, we clearly situate ourselves in a view of sharing best practices

Why share best practices?

- To clarify on the potential intervention of Europe and of the social partners
- To find points of comparison between the projects proponents
- To show the most important achievements and create around these successes dynamics of mobilisation and duplication

How to share best practices?

- By adopting a simple process of selection of the best practices:

- Propose a list of projects (in the form of project sheets)
- Evaluate these projects In light of the selected criteria (territorial representation, impacts, cost, evaluation, implementation rate, sustainability of measures...)
- Validation of on-going projects (communication, development of guides)

Condition of success

- The obligation to associate each best practice action to its quantitative results and the evaluation's conditions that have been implemented.
- Definition of a set of "macro criteria" in order to make a selection of practices: example: impacts, costs, evaluation etc...

- The use of a very fast tool that describes the best practices: ISP's wiki, an intranet's tool that could aim both R&D managers and social partners

Which common actions are to be considered in view of best practices that are highlighted in this report?

- Develop a certification and labelling scheme for quality training in the TCLF sectors on the basis of requirements already developed by national ISPs, in cooperation with them
- Contribute to the ESCO work; in order to avoid duplication of similar services in each country (all our countries have job description or job standards)
- Elaborate a competency framework of skill required for tutors: indeed the know-how transfer seems to be an accurate issue for our sector, and it seems important to favour the process of validating long experienced and high specialisation workers tutors and trainers of new incoming workforce.





RECOMMENDATIONS OF THE SKILLS COUNCIL

PAST RECOMMENDATIONS

During the first year of activities, the TCLF ESSC has issued a set of 7 recommendations, each of which has been addressed to a main stakeholder and to other actors, which were asked to provide specific support actions. The overall objective of this action was to provide the TCLF sector with strategies and tools aiming at improving the qualifications of the sectoral labour force, and at assisting enterprises to be more flexible in meeting changing competitive demands. A synthetic analysis of the issued recommendations is provided in the following figure.

ESSC members took concrete actions addressing several of these recommendations both at national and at EU level, some of which have been described in the previous sections of this report. In general, the TCLF ESSC considers that the recommendations, which were issued, are still valid, and constitute an adequate strategic background to start from.

RECOMMENDATIONS		ADDRESSED STAKEHOLDERS				
		EUROPEAN COMMISSION	NATIONAL SOCIAL PARTNERS	NATIONAL ISPs	NATIONAL PUBLIC AUTHORITIES	TRAINING PROVIDERS
1	To support the TCL ESSC through adequate resources, while keeping its autonomy, to succeed its goal to become a fundamental tool of good governance in VET, initial education and employment in the sector	MAIN	SUPP.		SUPP.	SUPP.
2	Implement and develop national networks, aiming at favouring an efficient system to collect and elaborate reliable data and information	SUPP.		MAIN	SUPP.	
3	To use the ESSC as a facilitator to a transversal approach across the Commission services regarding the issues of skills, competencies and labour market at sectoral level, in coherence with implementing policies stemming from the EU flagship initiatives	MAIN				
4	To support the implementation of inter-sectoral and transnational projects and working groups, linking innovation to skills development and evolution of the labour market	MAIN	SUPP.	SUPP.		
5	To support the implementation of communication strategies toward the new generations, aiming at attracting new skilled workers to the industry	MAIN	SUPP.	SUPP.	MAIN	
6	To fully exploit the ESSC, in order to orientate their training offer and to create a model of excellence in sectoral training					MAIN
7	The TCL Skills Council supports measures to increase attractiveness and implementation of the concept of Life Long Learning in our TCL sectors, in order to increase the internal and external employability of their skilled employees	MAIN	MAIN	MAIN	MAIN	MAIN

INTELLIGENCE

Data collected and analysed in the first part of the report show that, although some competitive pressure on sectoral employment is still evident, signs of strengthening of the structure and of the competitiveness of the sector are coming up in several EU countries.

As the second part of the report has clearly depicted, the TCLF sectors have changed and continue to change significantly, driven by a large variety of evolving scenarios. Many of the described drivers offer a number of wide reaching opportunities for the renaissance of the TCLF sector in Europe. In parallel, skills and competences are also constantly adapting with new taxonomies, and new occupations are being created.

Part three of the report has demonstrated the creativity and engagement of ISPs and other national stakeholders to continuously develop effective tools and methodologies to answer rapidly evolving skills needs. In two years of activities of the ESSC, more than 50 tools and methods were analysed and highlighted.

COOPERATION AMONG ISPS

Besides the intelligence produced when elaborating the report, the second year of functioning of the ESSC has brought important results in terms of the enhanced cooperation among member ISPs. Regular meetings of the ESSC, continuous exchange of information and intense cooperation have allowed ISP partners to compare their work methodologies and sometimes re-tune their operations. Social partners have witnessed an intense and continuous transfer of information, insights, methods and materials from one to the other partner. The dissemination of a French educational DVD on occupations in the textile sector, provided free of charge by Opcalia to IVOC and distributed in Belgian schools in 2014, is a good example of cooperation favoured by the ESSC.

Moreover, the Belgian e-commerce project (see the part 2 of the Report) has its roots in the ESSC where discussions revealed that the theme has been on the agenda of sectoral social partners & policy makers for some time in FR and the UK.

IVOC made good use of FR and UK materials.

During 2014, social partners agreed to shift some funds of the ESSC budget to allow the translation from Dutch to French of the edugame 'Wie Wordt Textielexpert?', in order to be then disseminated in Belgium and France. The French "savoir faire" project might become just as important. BE and UK wish to adopt FR methodology and tools for knowledge retention & transfer and implement them for their own public, in collaboration with Opcalia. The project was set up in 2014 and will be rolled out in 2015.

CURRENT STRUCTURE AND COMPOSITION OF THE ESSC

The current logical structure is described in the following figure,

It is mirrored in the current version of the TCLF ESSC statutes, where the following ESSC bodies are foreseen:

Full members

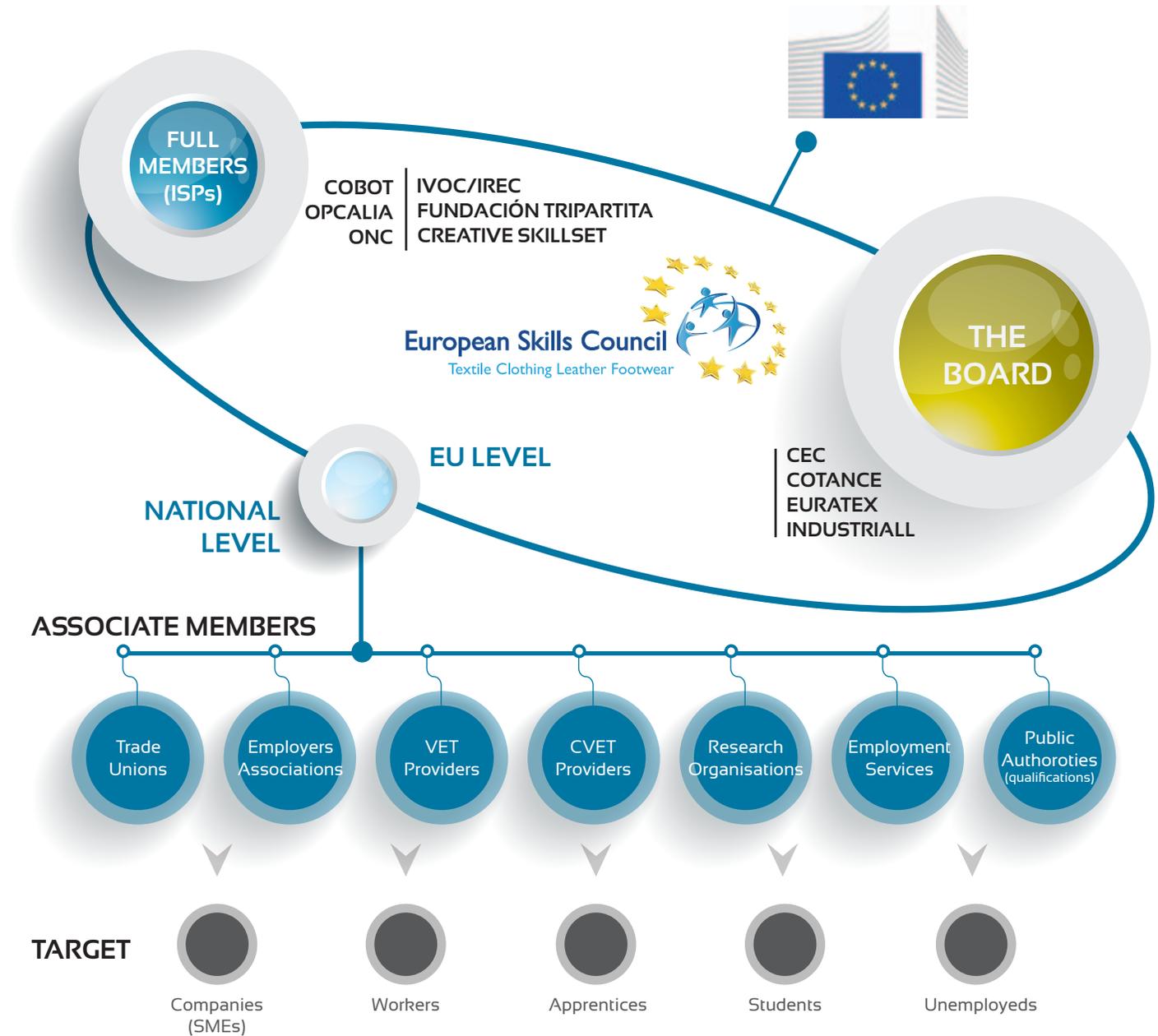
Full members are the founding members (EU Social partners in TCLF) and the National ISPs with a relevant involvement in Education, Training and Employment in the TCLF Industries. Among the full members, EU social partners form the board.

Associate members

Technical Centres with an involvement in TCLF Industries

Education & Training institutions with an involvement in TCLF Industries

Research organisations with an involvement in TCLF Industries



TCLF EUROPEAN SECTOR SKILLS COUNCIL RECCOMENDATION

Public Authorities with an involvement in Education, Training and Employment

National Trade Unions representing the TCLF Industries

National Employers Associations representing the TCLF Industries

Corresponding members

Any company/worker/individual with a particular involvement in Education, Training and Employment in the TCLF Industries.

These informative inputs have been discussed several times during the year, allowing the social partners and the other members of the ESSC to develop a deep understanding of the different issues identified. The final decision of the council has been to structure the 2014 recommendations as:

- **One “Structural Recommendation” that defines the conditions in which the ESSC can maximise its impact on sectoral Employment and Skills.**
- **4 prioritised actions to be implemented in the short-medium term by the ESSC, through specific projects at national and European level.**

CONDITIONS FOR MAXIMISING ESSC IMPACT

The future ESSC should:

- **increase the sectoral and territorial representativeness of the ESSC, taking into consideration the territorial distribution of the TCLF manufacturing and the national peculiarities in terms of production, added value and resident knowledge**
- **implement and develop an efficient and harmonised system to collect and elaborate reliable data and information on employment and forecasting**
- **involve more actively different categories of national and regional stakeholders, essential for the implementation of concrete projects**
- **further develop cooperation and exchange of good practices among its members**

The European Commission should:

- **support the TCL ESSC through adequate resources, while keeping its autonomy and ensuring its medium to long term stability**
- **foster the strategic complementary interaction between the ESSC and other initiatives on employment and skills (ESCO, EU Skills Panorama, European qualification framework, Sector Skills Alliances and Knowledge Alliances) and favour exchange of information on common long term objectives.**

FUTURE PRIORITISED ACTIONS

The ESSC shall exploit the sectoral intelligence developed and the established network of stakeholders to develop concrete projects aiming at:

- **supporting the implementation of communication strategies toward the new generations, emphasising the career opportunities in the EU TCLF sector and attracting new skilled workers to the industry**
- **favouring the design and delivery of joint VET programmes, teaching and training methodologies, based on the evolving sectoral needs**
- **creating a framework for a rapid response to the current evolution in business models, processes and sales strategies, in terms of continuous training and competences provision**
- **developing a TCLF quality training certification scheme, on the basis of requirements already developed by national ISPs.**





APPENDIX

PRESENTATION OF THE MEMBERS OF THE SKILLS COUNCIL



EUROPEAN SOCIAL PARTNERS

EURATEX - EUROPEAN APPAREL AND TEXTILE CONFEDERATION



EURATEX is the European Confederation representing the interests at the level of the EU institutions of the European textile and clothing industries as a whole. A Secretariat deals with the numerous policy issues that are of direct interest to our industry.

Given that in the European Commission alone there are potentially 11 Directorates General and at least 5 decentralised agencies to do business with, effective input from EURATEX can be achieved only with the committed support of specialists from our members.

- EURATEX is the recognized official body for the Textile and clothing industry at European and International level:
- Since 2008 EURATEX is registered under the European Union 'Transparency Register' – ID number : 7824139202-85
- Our participation as official stakeholders in number of actions organised by the EU Commission in area like Trade, Environment, Education, Training, Innovation, R&D, Standards, Industry & Enterprise etc.
- EURATEX is part of the European Social Dialogue for the textile and clothing industry together with its trade union partner to contribute to the sustainable development of employment and to promote the industry competitiveness.
- EURATEX is recognised by the Commission as the voice of the "European Technology Platform for the future of textile and clothing". In that sense we are certified and recognised as one of the key bodies to consult (DG Research).

EURATEX is an observatory Member of CEN, the official European body for standardization, and follows in particular the works of TC248 technical committee for textiles products.

EURATEX's member federations directly or indirectly represent, in the EU, some 186.000 companies of an industry employing 1.8 million workers. The companies which are overwhelmingly small and medium-sized enterprises cover a broad industry cross-section in terms of product, market segment and geographical spread.

With a household consumption of nearly 500 Billion Euro, the EU-27 is the largest world market for textile and clothing products. Furthermore, it is the second world exporter in textiles as well as in clothing.

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INDUSTRIALL EUROPEAN TRADE UNION



IndustriAll European Trade Union

The industriAll European Trade Union was created on 16/05/2012 by decision of the affiliates of the European Metalworkers' Federation (EMF), the European Mine, Chemical and Energy Workers' Federation (EMCEF) and the European Trade Union Federation: Textile, Clothing, Leather and Footwear (ETUF:TCL) to join forces.

The industriAll European Trade Union is an

organisation of independent and democratic trade unions representing manual and non-manual workers in the metal, chemical, energy, mining, textile, clothing and footwear sectors and related industries and activities.

The industriAll European Trade Union unites trade unions of the basic, production and energy industries and is organising over 7 million members from 196 national affiliates.

Our main working areas are:

1. Industrial Policy and Industrial workers' vision for a sustainable European industry
2. Active company policy for sustainable jobs and working conditions
3. Coordination of Collective Bargaining and Social Policies
4. European Social Dialogue: building our capacity for joint action, maximising policy impact, developing our capacity for negotiation

The industriAll European Trade Union is Social Partner in 11 European Sectoral Social Dialogue Committees (SSDC's). In the sector for Textiles, Clothing, Leather and Footwear, we are Social Partner in the SDC for Textiles & Clothing (with Euratex as counter partner), the SDC for Tanning

& Leather (with Cotance as counter partner) and the SDC for Footwear (with CEC as counter partner).

The industriAll European Trade Union has itself as well 10 Sector Committees in which all the aspects of the sector are debated and analysed : industrial situation, social and collective bargaining developments, company developments, social dialogue at national and European level etc. One of these sector committees is the Sector Committee TCL.

The industriAll European Trade Union is the largest European industrial trade union federation and member of the European Trade Union Confederation (ETUC)."

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COTANCE - CONFEDERATION OF NATIONAL ASSOCIATIONS OF TANNERS AND DRESSERS OF THE EUROPEAN COMMUNITY



The Confederation of National Associations of Tanners and Dressers of the European Community

(COTANCE) is the representative body of the European Leather Industry. It is a non-profit organization established in order to promote the interests of the European tanning industry at international level. Apart from representing European tanners and dressers, it also has the mission of promoting European leather both in the European and international markets.

COTANCE is the only qualified interlocutor representing the views of the European Tanning Industry. It has gained a wide recognition both internally and externally as the reference body for the European leather industry.

COTANCE's activities and policies focus on promoting the economic growth and sustainable development of the European tanning industry.

COTANCE members meet regularly at the annual Assembly General and twice a year in Council.

The political drive of COTANCE comes from its Presidency. It is composed of a President and four Vice-Presidents elected from among well known European tanners for a two year period. COTANCE's Secretary General assists them and heads the Brussels-based secretariat.

COTANCE also acts as the coordinating body for GERIC, the Grouping of European Leather

Research Institutes, which gathers all the technological centres of the EU developing R & D for the tanning industry. This has led to a series of advanced technology projects in the field of environmental protection, quality assurance and high-tech applications for the leather production process. The development of joint training projects for tannery operators completes the range of their services to the European Leather Industry.

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CEC EUROPEAN CONFEDERATION OF THE FOOTWEAR INDUSTRY



The European Confederation of the Footwear Industry (CEC) gathers the footwear national associations and federations of the European Union. CEC is THE VOICE of the European footwear industry vis-à-vis the European Institutions and other international organizations

and authorities in Brussels.

Through the national associations and federations, CEC includes activities stakeholders of the whole supply chain: from the collection of materials and components to the more common objective of recycling; from the manufacturers and retailers to the educational and technological centers. Current Members represent approximately the 87% of the European manufacturing. Their affiliates are 99% SMEs and directly employ more than 270.000 persons.

CEC's overall objective is to boost the competitiveness and sustainable growth of the sector, while the most specific objectives comprise:

- To promote the interests and values of the European footwear with regard to policies with an impact on the sector. Among others in international trade, CEC does not defend a protectionist European market, but instead the opening of worldwide markets and the respect of a level playing field globally.
- To support research and innovation through the participation in EU projects, which can help the sector to adapt to the new globalization challenges like to contribute to climate change mitigation, energy efficiency, scarcity

of materials, e-sales, new business models, consumer demands and needs, etc.

- To foster employment and the development of necessary skills, through European training initiatives.
- To serve as a platform between all footwear players for the interchange of information and best practices, as well as increase international collaboration with initiatives like the World Footwear Congress.

European footwear has positioned itself in the global economy by producing added value products. As example from 2009 until 2013, EU 28 footwear exports to third countries increased by 44,3% in quantity, and by 72% in value: a remarkable achievement under the period of economic crisis.

Website:

www.cec-footwearindustry.eu

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COBOT CENTRUM VOOR OPLEIDING, BIJ- EN OMSCHOLING VOOR DE TEXTIEL- EN BREIGOEDNIJVERHEID FLEMISH CENTER FOR EDUCATION, TRAINING AND RETRAINING FOR THE TEXTILE AND HOSIERY INDUSTRY



Cobot is a non-profit sectoral training centre for the Flemish textile industry. It is managed by the board of directors, which comprises of all social partners, i.e. employers organisation Fedustria and the three trade unions. They approve unanimously on strategic matters and specific projects. The centre is funded through a compulsory contribution for education and training (0.3% of the wages of textile workers). Cobot is the industry's first partner in training, education and guidance.

Its mission: 'To strengthen and renew the competences in the textile industry.'

Work areas:

1. Competence management

Goal: To help a maximum number of textile companies and employees to find the way to effective training.

Training formulas:

- open training
- in company training
- training in the workplace
- e-learning

2. Labour market management

Goal: To create a balance between demand and supply on the sectoral labour market.

Activities:

- inflow actions (attracting students and job seekers)
- retention actions (e.g. focus on the end of the career).

Website:

www.cobot.be (NL)

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IVOC/IREC
INSTITUUT VOOR VORMING EN
ONDERZOEK IN DE CONFECTIE /
INSTITUT POUR LE RECHERCHE
ET L'ENSEIGNEMENT DANS LA
CONFECTION
INSTITUTE FOR RESEARCH AND
TRAINING IN DRESSMAKING



IVOC supports training actions in Belgium in the Ready-made clothing & upholstery sectors. The IVOC activities and services are funded by the companies within the sector. This contribution is automatically withheld from the salary mass.

IVOC is managed by the social partners.

- The employers are represented by Creamoda (ready-made clothing companies).
- The employees are involved via the trade unions ABVV Textiel, Kleding en Diamant, ACLVB, ACV Metea, BBTk and LBC-NVK. IVOC works together with companies to find the best approach for the organisation of both external and internal training courses (given by an employee of the company).
- IVOC offers a wide range of training courses, including both technical and general topics (Dutch or French-spoken)
- IVOC supports the realisation of training plans within companies
- Employees who follow training courses or career guidance on their own initiative can recover these costs via a learning account, granted by IVOC.

IVOC also helps job-seekers and co-operates with numerous organisations that are active in professional training and education in the sector in Belgium and abroad.

IVOC is the Dutch acronym; IREC is its French equivalent.

Website(s):

www.ivoc.be (NL)

www.irec.be (FR)

www.modeonderwijs.be (NL)

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FUNDACIÓN TRIPARTITA PARA LA FORMACIÓN EN EL EMPLEO *TRIPARTITE FOUNDATION FOR EMPLOYMENT TRAINING*



Fundación Tripartita para la Formación en el Empleo-FTFE (Tripartite Foundation for Training in Employment) is a national body belonging to the Spanish public sector. It manages nationwide continuing vocational training (CVT) schemes

in Spain on a social dialogue and tripartite (national employment agency, employers' and trade unions' organizations) basis. It is involved in promoting, disseminating and funding CVT programmes for employed workers and in associated research, especially sectoral and target groups' training needs, learning tools and methodologies.

FTFE is a tripartite body whose governing board is composed of three parts: the government or administration through the National Employment Service/Ministry of Employment and the leading employers' (CEOE and CEPYME) and trade unions' (CCOO, UGT and CIG) organizations.

In this complex system of vocational training for employment one of the most relevant elements are the Joint Sectoral Committees. They represent both the employers and trade union organizations within each industry or branch and are created under the umbrella of collective bargaining. They add a lot of flexibility to the model and have first-hand knowledge of what is happening in companies, so that they can provide meaningful information. Their role is quite unfulfilled, from deciding what training should be funded in supply training plans, to suggesting necessary studies, research and training tools for the sector.

TCLF sector in Spain counts on 120,380 workers in total. The main activities in the sector are clothing and textile with 53,473 and 41,850 jobs. Footwear stands at a total of 21,356 workers and leather has 3,700. Three Joint Sectoral Committees are active within the TCLF industries as a whole: 1) textile and clothing; 2) footwear; and 3) leather.

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OPCALIA (FORMERLY FORTHAC) DÉPARTEMENT TEXTILES - MODE - CUIRS OPCALIA TEXTILE – FASHION – LEATHER DIVISION



PROMOTEUR DE COMPÉTENCES

Opcalia is an OPCA (a joint body for collection of fundings for trainings). There are twenty of them in France. It is a joint body (managed by representatives from businesses and employees

under the guardianship of the state) that undertakes to collect and handle the mandatory participation of companies for vocational training. Opcalia spreads out the companies' investment: which allows financing a part or all of the training plans that are put into place by the companies, but also qualitative projects on employment, training and HR issues.

Opcalia has 95,000 affiliated companies that represent more than 3 million employees.

Opcalia is a multi-professional and multi-branch organisation that manages training funds of all types of companies. The company is divided in several dedicated departments and has a specific one for the Textile, Fashion, Leather companies. This particular department also includes L'Observatoire des métiers de la Mode, des Textiles et du Cuir (Observatory for Fashion, Textile and Leather-related jobs) – Opcalia TMC in short.

On behalf of the social partners of different branches (Footwear, Fashion design, Leather, Steam Pressing, Clothing, Textile) Opcalia TMC's aim is to help firms of the sector to anticipate economic, social and demographic changes concerning employment and qualification, by fostering access to vocational training to employees, more specifically the most vulnerable: special funding, professional

qualifications, innovative and specific devices (HR diagnostics, official training session with branch label, job studies, capitalisation operations and transfer of know-how...). In 2012, Opcalia TMC:

- trained 32,365 employees,
- 2,365 work experience contracts were created,
- more than 800 official training session with branch label were delivered.

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www.opcalia.com (FR)

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OSSERVATORIO NAZIONALE CONCIA NATIONAL TANNING OBSERVATORY



ONC is a bipartite observatory on employment and training for the Italian tanning sector , composed by the leading Italian employers association (UNIC) and Trade Unions.

Its aim is to analyse and assess sectoral issues and propose initiatives in the following areas: Environment and safety, Education and training, Labour Market, Social responsibility for the sector.

Unic and Trade Unions (FILCTEM-CGIL, FEMCA-CISL, UILTEC-UIL) , that are parts of the OSSERVATORIO NAZIONALE CONCIA, at National Level underwrite the National Collective Labour contract in which is underlined the importance of Training as a strategic component for the development and competitiveness of the sector.

UNIC, supported also by Trade Unions, has been active in developing the meeting between schools and businesses in order to provide graduates the skills needed by the productive world.

Unic promotes:

- Orientation activities for young people to improve the attractiveness of the sector
- Project initiative that aim to improve the attractiveness of the leather sector in young people
- Communication activities , with the goal of promoting Italy's world-leading tanning industry

and of disseminating the leather culture an tradition.

As the observatory has been created on March 16th 2012, it does not possess a stable research structure.

Given the fact that the role of ONC is mainly advisory, in order to guarantee practical and useful information, it relies on the sources of information which are resident in its founding members.

The economic studies department of Unic elaborates Statistical information together with specific surveys and researches carried out periodically with samples of tanneries.

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CREATIVE SKILLSET CREATIVE INDUSTRIES' SECTOR SKILLS COUNCIL



Creative Skillset is the UK's Creative Industries' Sector Skills Council (SSC), the industries' skills partnership for the Media Entertainment, Advertising, Publishing, and Fashion and Textiles Industries. We support skills and training for people and businesses to ensure the UK creative

industries maintain their world class position. We do this by influencing and leading; developing skills, training and education policy; and through opening up the industries to the UK's pool of diverse talent. We conduct consultation work with industry, publish research and strategic documents, run funding schemes and project work, and provide information about the challenges that face the industry and what we need to do to overcome them.

We also provide impartial Creative Industries careers resources for those looking for a route in, as well as for established industry professionals online and over the phone. Whether you are a freelancer looking for training information, a student furthering your knowledge of industries or a public agency partner, we aim to provide you with easy access to the information you require.

Governance/Structure

The Creative Skillset Board of Directors is made up of leading industry figures who guide every aspect of Creative Skillset's work. The board is chaired by Stewart Till, Chair of Icon Entertainment UK and CEO of Sonar Entertainment. The Board is made up of representatives from all the sectors we represent across all UK nations including large and small employers, SMEs, trade associations and unions. The structure of Creative Skillset also includes various layers of governance below the Board

of Directors for each of the sub-sectors we represent. For Fashion and Textiles, this is the Fashion and Textiles Council which is convened by Creative Skillset to advise and guide on all aspects of skills development for the industry throughout the UK and made up of key industry employers and employer associations. Creative Skillset also has governance arrangements within the devolved administrations. These include the Scottish Textiles Strategy Group and the recently initiated Welsh Fashion and Textiles Forum.

Website:

www.creativeskillset.org/fashion_and_textiles
(EN)

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Part 1:

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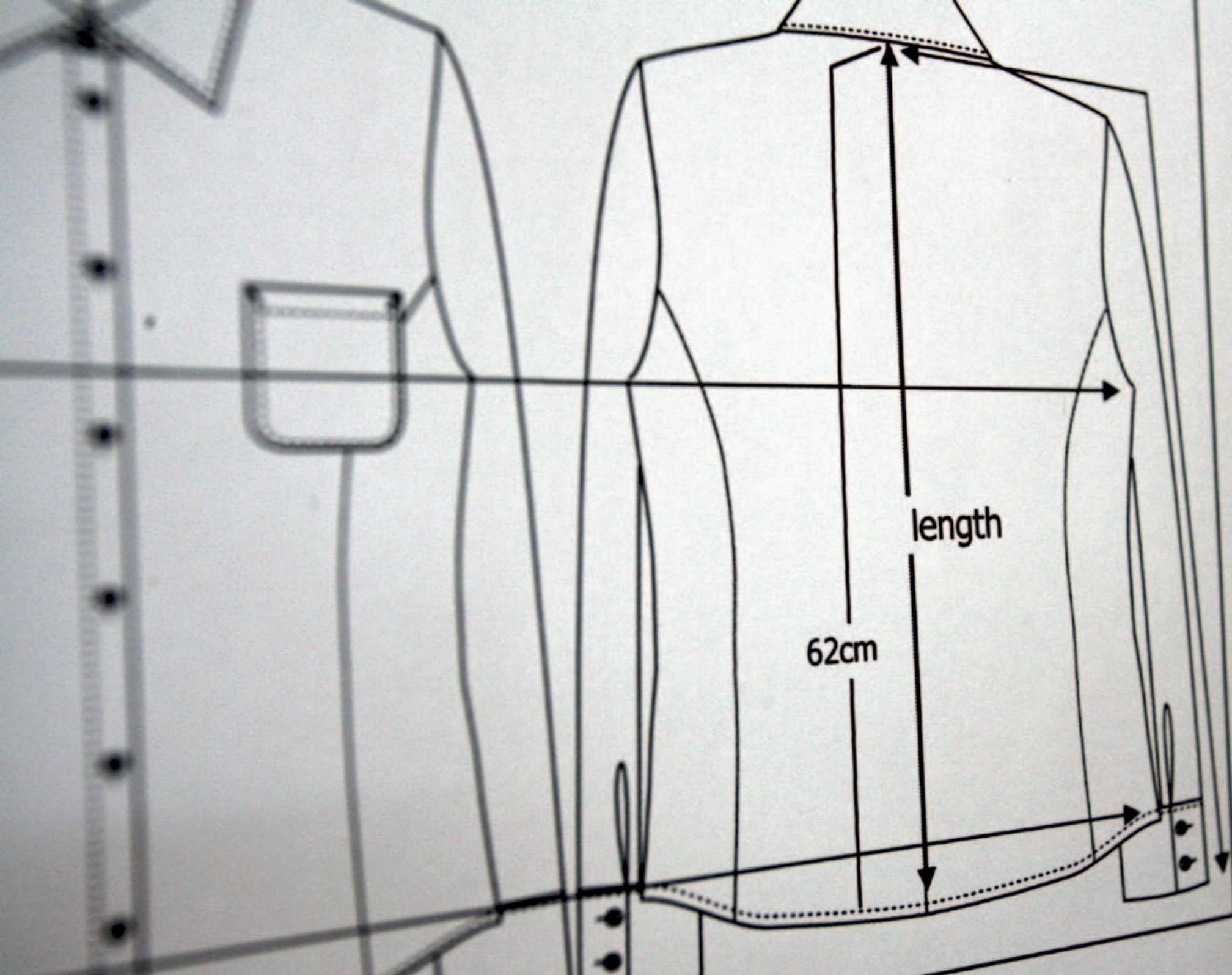
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A blue-tinted photograph of a person in a suit holding a smartphone, with another person's hand visible in the foreground.

APPENDIX TO PART 1

Analysis and selection of the EU Skills Panorama Key Indicators by ISP – 2014 (selected indicators = bold)

Skills demand	Numbers employed
	Anticipated change in numbers employed
	Change in employment rate
	Change in country/ sector/ occupation contribution to employment
	Change in the stock of job vacancies
	Change in the public employment services (PES) job vacancies
	Top growth occupations (by highest numbers of recent recruits)
	Top 10 occupations (by highest numbers of vacancies registered in the PES)
	Top 5 EURES jobs
	Change in numbers employed in knowledge intensive industries / in health and social care / in science and technology
	Change in the number of entrepreneurs
	Change in active workforce and anticipated change
	Change in active labor force aged over 50
	Projected change in working age population
	Projected change in the old age dependency ratio
	Change in tertiary education graduates
	Change in the proportion of 30-34 year olds with tertiary education achievement
	Change in students in science, mathematics, computing, engineering, ...
	Change in early leavers from education and training
	Low achieving young people (15 year olds) in reading, maths and science
	Change in young adults who have completed upper secondary education
	Change in ISCED level 3 participation in vocational education and training
	ISCED levels 3 and 4 attainment in vocational education orientation / in general educational orientation
	Change in participation in education (students aged 15-24), by gender

Skills demand	Change in pupils learning two or more foreign languages, ISCED level 2
	Change in adult participation in education and training, 25-64 age group
	Change in employees participating in continuing vocational training courses
	Employers offering training
	Change in the level of computer skills / Internet skills 16-74 olds
	Change in high level Internet skills, by level of education
	Change in the number of non-nationals in the population
Change in emigration rates, by education level	
Skills imbalance	Proportion of employed individuals with qualification level not matched to qualification requirement of job
	Top 5 occupations experiencing skill bottlenecks (hard-to-fill vacancies)
	Change in the overall unemployment rate, 20-64 age group
	Change in the long-term unemployment rate, 20-64 age group
	Change in the unemployment rate, age group 25-39
	Duration between leaving formal education and starting first job, 20-34 year olds
	Proportion of graduates who are unemployed
	Change in employers experiencing difficulties in recruitment
Skills Mismatch	

**Evolution of employment
in the textile industry in Europe**
NACE13 - Textiles (Manufacture of textiles)

 Source: Euratex Members + Euratex estimates
Methodological note
• The figures are based on new NACE Rev.2 classification.

• These data are below reality due to difference in the coverage (companies' size, definition, etc.). As a consequence, total EU figure is under-evaluated as it does not capture the entire TC universe i.e. micro companies, countries data missing, etc...

	2005	2006	2007	2008	2009	2010	2011	2012	average yearly evolution
Belgium	32,079	30,145	28,709	27,430	23,531	22,083	21,208	19,805	-6.60%
Czech Rep,	46,030	42,730	38,614	32,296	28,004	26,432	26,511	26,326	-7.50%
Germany	93,439	87,408	97,558	88,793	79,907	79,657	81,782	81,373	-1.71%
Denmark	6,891	6,987	6,817	5,189	3,761	3,340	3,255	3,154	-9.90%
Greece	26,300	25,122	25,000	22,900	13,627	11,820	9,640	7,290	-15.71%
Estonia	9,272	8,288	7,751	6,137	4,440	4,428	3,886	3,894	-11.12%
Spain	95,100	86,700	81,930	71,280	63,083	59,989	58,069	54,875	-7.49%
Finland	5,049	4,860	4,749	3,940	3,496	3,232	3,106	2,898	-7.50%
France	81,134	74,874	71,234	56,622	50,698	48,131	46,831	43,360	-8.39%
Hungary	24,461	20,092	14,460	12,555	12,676	11,733	12,548	13,629	-7.14%
Ireland	5,830	5,130	4,771	2,358	2,527	1,636	1,610	1,513	-15.04%
Italy	183,950	178,845	173,934	168,020	157,403	149,022	142,413	134,508	-4.36%
Latvia	10,004	8,604	8,966	3,698	2,572	2,483	2,509	2,644	-13.72%
Lithuania	14,708	14,574	13,011	10,033	7,657	7,141	7,475	7,744	-8.10%
Netherlands	10,405	10,148	10,088	14,043	12,630	12,251	12,423	12,224	3.27%
Austria	15,187	14,762	14,570	13,346	12,118	12,530	12,655	12,225	-2.96%
Poland	61,962	62,456	62,799	58,634	54,310	53,210	52,838	50,420	-2.85%
Portugal	81,904	75,522	71,156	64,562	59,015	45,121	43,119	39,652	-9.64%
Sweden	5,011	4,508	4,399	7,018	6,151	6,241	5,758	5,372	3.11%
Slovakia	14,230	13,130	13,000	6,812	5,270	6,198	7,019	6,780	-7.36%
Slovenia	10,000	8,875	7,094	6,001	5,117	3,746	4,357	4,075	-11.20%
United Kingdom	86,450	77,977	68,000	63,754	59,673	65,044	54,511	54,197	-6.14%
Cyprus	612	558	566	502	491	516	486	455	-4.00%
Malta	1,088	795	693	483	434	422	426	426	-11.72%
Bulgaria	37,176	36,652	36,395	17,345	13,275	12,401	11,115	11,272	-13.35%
Romania	50,729	45,217	40,648	36,171	28,669	28,068	29,120	31,217	-6.27%
Croatia	7,200	7,800	8,017	6,900	4,596	5,727	3,840	3,325	-8.28%
TOTAL	1,002,550	938,982	906,914	799,922	710,535	676,874	654,671	633,496	-6.28%

Evolution of employment in the clothing industry in Europe
NACE14 - Clothing (Manufacture of wearing apparel)

 Source: Euratex Members + Euratex estimates
 Methodological note
 • The figures are based on new NACE Rev.2 classification.

• These data are below reality due to difference in the coverage (companies' size, definition, etc.). As a consequence, total EU figure is under-evaluated as it does not capture the entire TC universe i.e. micro companies, countries data missing, etc...

	2005	2006	2007	2008	2009	2010	2011	2012	average yearly evolution
Belgium	6.515	6.000	5.974	5.874	5.385	5.131	4.875	4.725	-4,45%
Czech Rep,	30.012	25.993	23.664	25.354	27.172	26.581	26.953	25.686	-1,93%
Germany	53.816	52.309	50.633	50.472	46.337	45.624	46.439	46.671	-1,97%
Denmark	9.609	10.224	10.789	2.365	1.669	1.599	1.609	1.580	-14,42%
Greece	40.100	39.600	38.900	37.180	29.541	27.280	21.360	20.270	-8,92%
Estonia	12.059	11.397	10.505	9.225	7.461	6.734	6.658	6.118	-9,09%
Spain	105.500	99.900	92.310	79.387	65.892	59.221	54.661	50.835	-9,82%
Finland	4.126	3.766	3.443	3.101	2.294	2.097	1.989	1.645	-12,04%
France	54.890	52.286	49.298	50.947	44.443	42.875	41.846	43.471	-3,13%
Hungary	37.823	31.255	28.261	25.406	23.935	21.720	20.809	19.884	-8,68%
Ireland	3.014	2.653	2.467	1.765	1.432	1.177	1.221	799	-16,42%
Italy	340.980	337.828	339.038	340.196	324.877	309.607	304.515	288.836	-2,32%
Latvia	15.364	15.507	14.514	11.972	9.720	9.993	10.867	10.552	-4,73%
Lithuania	39.220	35.025	30.982	26.910	21.548	20.407	20.815	18.754	-9,79%
Netherlands	5.861	5.768	5.820	4.647	3.873	3.716	3.498	3.442	-7,00%
Austria	8.246	7.760	9.350	9.150	8.650	8.000	7.800	7.650	-0,71%
Poland	172.883	165.563	167.934	150.291	127.508	110.920	107.703	103.205	-6,94%
Portugal	119.361	111.315	109.179	103.700	98.130	93.003	89.691	83.812	-4,91%
Sweden	1.269	1.239	1.183	1.965	1.744	1.345	1.400	1.158	1,70%
Slovakia	25.805	25.128	21.822	21.716	17.378	20.497	19.818	15.399	-6,27%
Slovenia	8.779	8.327	8.943	8.057	4.069	3.860	5.825	5.193	-3,18%
United Kingdom	60.700	54.232	46.510	35.936	32.040	39.561	30.362	28.558	-9,17%
Cyprus	1.420	1.326	1.246	1.149	1.003	767	676	633	-10,70%
Malta	2.685	2.575	1.900	612	408	396	401	400	-19,05%
Bulgaria	144.689	144.978	132.365	136.004	117.184	111.645	105.482	108.272	-3,88%
Romania	315.964	282.969	248.857	209.019	169.190	155.507	160.646	161.128	-8,86%
Croatia	23.204	20.660	19.793	27.544	24.755	22.381	18.611	16.027	-3,78%
TOTAL	1.646.991	1.563.691	1.486.378	1.352.400	1.192.883	1.129.263	1.097.919	1.058.962	-6,07%

**Evolution of employment in the leather industry
in Europe NACE15 - Leather (Manufacture of leather
and related products, including footwear)**

Source: Euratex & Cotance estimates
Methodological note:
• The figures are based on new NACE Rev.2 classification.

• Fluctuations can be due to a changes in the categorization and registrations.
The most recent, available figures are listed
• No calculations of averages in cases of missing data

	2008	2009	2010	2011	2012	average yearly evolution
Austria	4,256	3,790	3,822	3,904	4,176	0%
Belgium	268	292			1,276	
Bulgaria	18,371	16,441	17,671	18,153	16,806	-2%
Cyprus	172	139	124	73	71	-18%
Czech Rep,	7,145	5,949	6,827	6,777	6,376	-2%
Denmark	33		311			
Estonia	1,573	1,332	1,234	1,363	1,254	-5%
Finland	1,967	1,954				
France	25,593	25,294		26,659		
Germany	17,815	16,187	20,718	18,040	15,192	-2%
Greece	5,601	3,133		2,600	2,412	
Hungary	13,192	11,869	10,491	10,850	10,670	-5%
Ireland	163	141		133		
Italy	128,499	119,316	140,775	137,911	141,137	3%
Latvia	470	366	343	363	435	-1%
Lithuania	1,423	1,110	1,084	1,049	1,035	-7%
Malta		57				
Netherlands	1,849	1,767	1,951	1,921	1,896	1%
Poland	25,793	26,766	26,486	26,149	24,992	-1%
Portugal	44,969	43,768	43,114	44,659	45,297	0%
Romania	72,709	59,679	57,840	63,566	62,144	-3%
Slovakia	12,119	10,750	10,027	10,779	10,789	-3%
Slovenia	4,313	3,695	3,468	3,859	3,726	-3%
Spain	39,768	33,223	34,958	34,489	32,980	-4%
Sweden	1,116	882	723	990	932	-2%
United Kingdom	6,727	7,400				
TOTAL	435,904	395,300	381,967	414,287	383,596	-3%

**Evolution of employment in the footwear industry
in Europe NACEI52 - Footwear (Manufacture of footwear)
Analysis of the footwear sector isolated from the leather sector**

 Source: Data come from Eurostat except those with
*, which have been provided by National Footwear
Associations or Federations.
Methodological note:

- The figures are based on new NACE Rev.2 classification.
- Fluctuations can be due to a changes in the categorization and registrations.
The most recent, available figures are listed
- No calculations of averages in cases of missing data

	2008	2009	2010	2011	2012	average yearly evolution
Austria	1,712	1,592	1,439	1,039*	1,125*	-9%
Belgium	319	374	266			
Bulgaria	15,988	14,540	15,259	16,038	14,504	-2%
Cyprus	146	101	66	54	55	-20%
Croatia				5,820		
Czech Rep,	3,715	3,253		3,130	2,625	
Denmark			149	62	42	
Estonia	928	794	770	812	789	-4%
Finland	1,569	1,456	1,322	1,621*	1,501*	
France		7,249*	6,301*	5,763*	5,477*	
Germany	10,183	9,827	9,606	11,308*	11,793*	4%
Greece	3,754	3,493	2,918	3,150*	2,518*	-9%
Hungary	7,611	6,785	6,961	7,053	7,438	
Ireland		86				
Italy	94,031	86,232	81,911	80,925*	79,254*	-4%
Latvia	156	135	149	166	223	11%
Lithuania	684	624	604	577	544	-6%
Malta						
Netherlands	884	858	806	783	745	-4%
Poland	21,235	19,741	19,151	18,902	15,000*	-8%
Portugal	41,724	39,798	39,238	34,509*	35,355*	-4%
Romania	64,915	53,457	51,541	56,444	54,600	-4%
Slovakia	10,842	9,711	8,512	9,121	9,367	-3%
Slovenia	2,217	1,999	1,693	1,395*	1,312*	-12%
Spain	31,443	23,956	22,858*	22,896*	24,263*	-6%
Sweden	291	253	334	150*	120*	-14%
United Kingdom	3,757	3,628	3,962	3,485	3,800*	1%
TOTAL	318,104	282,693	278,401	285,203	272,450	-4%

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