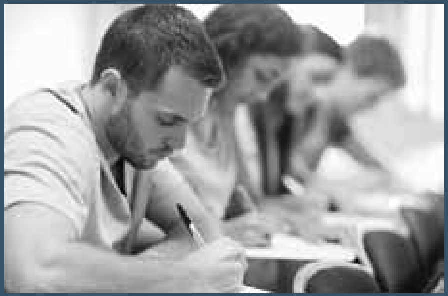
Annual report

Launch of the activities & initiatives of the european sectoral council
textile clothing leather for employment and skills

European Skills Council
Textile Clothing Leather

European Skills Council
Textile Clothing Leather

Report #1

The evolution of the supply, employment and skills needs including foresight and forecast analyses for the sector

This report has been elaborated with the support of the European Commission

0. SUMMARY
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Executive Summary

The purpose of this report is to provide an image of the work field of the social partners in the textile, clothing and leather sector. We provide an analysis of the sectors and indicate from which view the social partners respond to detected needs and opportunities.

The first part of this report will provide an overview of the employment and the trends in recent years. The findings, based on Eurostat figures complemented with sector specific data are nothing but confirming a further decline of jobs, even in the new member states. Unfortunately, the more pessimistic scenarios seem to become reality.

Yet realism should not hide us for the existing opportunities in our sectors. Actually, we bring a much more nuanced stories. For instance, considerations from an Italian case study in the tanning sector shows favourable prospects for the leather sector compared to the textile and clothing. But both French and UK studies also provide arguments to evaluate the situation in a much more nuanced way. For instance, for what concerns staffing needs, there seems to be a turning point after the crisis period of 2009.

On the same vein, a study on the employment prospects in the Belgian textile industry, confirms that even in the most pessimistic scenarios, significant employment opportunities still remain within this sector. Finally, we pay particular attention to the regional and SME profile of the sector as we argue for a regional labour market assessment in our sectors

The second part of the report concerns the framework of the actions of the social partners. These actions are built on a series of hypotheses. None of these are generally valid alone, as it excludes conclusions for one country to be translated to the situation in other countries.

Yet each working hypothesis is supported by field-experiences and by indications identified through research work. These hypotheses are important because they form the basis of concrete operations and also the answer to questions from the field and the choices the social partners make.

In particular we should highlight the following:

- The development of the competencies of the human resources (HR), is a credible and effective strategic responses to the existing challenges in our sectors.
- The production & technical competencies stay central in the future companies training plans and recruitment needs, even in the countries that massively reduced production activities until recently.
- An examination of the developments regarding the of importance for the future competence and recruitment needs shows that most companies mentioned technical progress and new technologies as main engines, but additionally the respondents indicate also challenges and opportunities specific to their own business or companies. A general and common path in the developments is hard to discover as single. 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, an hypothesis we link to recruitment difficulties, the characteristics of the workforce, and the changes in work organisation.
- Common areas in the policies of many companies are innovation and sustainability. The social partners consider them as key levers in the future developments in the sector.
- After the phasing out of the Agreement on Textiles and Clothing (ATC) provisions the TCL production and employment shares in many national economies declined. We find that today, the TCL look for a new breath, new credibility and thus credits on the labour market.

1. INTRODUCTION TO THE REPORT

This report is being written at a time where the European economy faces a huge recession and a historical high level of unemployment
of more than 10%. For youngsters this number even doubles.

The situation on and the perspectives for the labour market, this in all sectors, are far from bright.

No optimistic conclusions may be drawn from our analysis of the employment in the textile column for these are sectors which almost traditionally illustrate recession scenarios.

This however doesn't alter the fact that our analysis is meant initially as a basis for an active employment policy of the management and trade unions, which is already put into practice in several member countries today.

In this report we analyse the evolution of employment and skill needs in the textile, clothing and leather (TCL).

From an industrial manufacturing point of view, the textile, clothing and leather 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.

NACE	DENOMINATION
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

In this report, we look at figures for the whole of Europe, and we focus on the situations in the countries of the partner organizations of the European Skills Council (ESC-TCL). It is primarily in this context that the partner organizations are active and from where we set up cooperation.

The partner organisations have specific names in their respective countries, for example observatories, jointly managed sectoral funds or simply - training centres. In order to have a naming convention, we will refer to the organisations as Industry Skills Partnerships (ISPs), meaning a bipartite or tripartite sector specific organisation, active in the fields of education, training and employment in a defined geographical area.

ISPs are also active in other (sub) sectors, than the above mentioned, such as design (NACE 74.101), textile care (NACE 96.01), wholesale (NACE 46.42) and retail (NACE 47.71).

Regarding data availability, figures on employment or number of companies are not gathered for all subsectors in the same way. For the textile and clothing sector (TC), relatively complete data sets, based on Euratex members and Eurostat material, are available. Data are also available for the leather sector, although less complete or up-to-date.

When we look at the field of activity of the ISPs partner in the network, we find that the description of the target audience does not correspond to that of the Eurostat categories. Therefore we explain briefly - where useful for the report - the situation in the different member countries which participate in the network.

Moreover, in the context of the ESC-TCL work carried out, an inventory of studies and statistics available in Spring 2012 showed that a lot of material on the employment evolution and the development of skill needs in the TC sector is accessible (The different studies and statistics are available online, on the website of the ESC-TCL). Therefore the report will be based on existing material, namely the materials available to the European social organizations and the network of ISPs partners on the one hand and especially the recent third parties studies.

Important reference in this area is undoubtedly the PROGRESS Report from 2009 (Economix, 2009). This report, three years after its publication, has not lost many of its relevance. Therefore, in this report, we dont propose new, separate analyses.

Furthermore, it is worth mentioning that a research is currently being prepared for DG Enterprise and Industry, which should give once available- a fairly comprehensive analysis of the situation of the T&C sector in the EU and prospects, including trends in R&D, restructuring, education & training, and SMEs difficulties and challenges.

2. ANALYSES OF THE SITUATION IN THE EUROPEAN TCL

2.1. The global economic situation

The global economy nowadays is in better shape than during the 2009 crisis. But there is still not a clear recovery. Thanks to the U.S. and China economies, the global growth in 2011 nearly reached 4%. This growth rate is expected to fall back in 2012 to about 2.5 to 3%. In some regions however, the effects of the crisis are still strongly felt.

In the Eurozone, the situation remains extremely precarious. First of all, the continuing tensions in the markets lead to great uncertainty. The private consumption and investment are curbed. Some parts of the Eurozone have to deal with an exceptionally high unemployment rate. Thus, the unemployment rate in the Eurozone could increase following the European Commission from 10.2% in 2011 to 11% in 2012 and 2013.

Here we see very large differences between the various countries in Europe. The countries with the weakest growth also have the smallest margin to give their economy a boost in the short term. Due to the necessary savings, public debt reduction, high unemployment and persistent tensions on the financial markets, the European growth in 2012 would remain slack.

SMEs are particularly hard hit because their access to bank financing has significantly weakened. As significant downside risks to the growth outlook remain the tensions on the financial markets in the Euro-area and further increases of energy- and commodity prices.

Sources: Centrale Raad voor het Bedrijfsleven, Belgium (2012), Eurostat & European Commission, European Economic Forecast, spring 2012

Key figures for the TCL sector

- *The total employment in the TCL sector today is estimated at about 2.2 million workers, excluding the textile care.*

- *Italy remains by far the largest employer of the TCL sectors. Almost one in four of the workers is Italian.*

- *Traditionally, TCL are industries with high shares of women not only in services and administration but also in production activities. In the New Member States, the female share over the total workforce is much higher than in the EU15 and increased from 77.7% to 80.4% between 2000 and 2006. This different pattern emerges from the fact that less developed regions usually employs a higher proportion of low skilled workers. Despite a declining share, the proportion of females in TCL appeared to be more than double compared to the manufacturing sector.*

- *TCL is an aging industry. The shift to older workers (average 5% loss in the age group up to 40 years in the period 2000-2006) seems to perpetuate.*
  There are significant productivity differentials between the TCL subsectors.
  Textile is more capital intensive and produces relatively higher added value, apparel and leather create relatively more jobs.

2.2. Evolution of the employment in textile and clothing industry

The Textile and Clothing industry remains one of the main employer sector for number of regions across the EU and constitutes still the only manufacturing employment alternative in number of them, in particular for peri pheral areas. The TC industries are growingly relying on local, regional or national clusters integrated in the EU market.

Such clusters are creating networks able to deliver flexible solutions and products in tune with industry and household consumers needs both in the EU and worldwide.

Key figures for the textile and clothing industry

The total EU-27 textile and clothing industry, including manmade fibres, did represent in 2011:

- *Turnover of 171,400 million Euro (+4.8%) of which: textile & manmade fibres represent 54.8% and clothing 45.2%*

- *Investment of 5,150 million Euro (+6.7%) of which: textile & manmade fibres represent 63% and clothing 37%*

- *Companies: 186,865 (- 2.4%) of which: textile & manmade fibres represent 29.9% and clothing 70.1%*

- *Employment: 1,834,000 workers (-2.3%) of which: textile & manmade fibres represent 39.1% and clothing 60.9%*

- *In 2011 turnover per employee reached 93,444 Euro (+7.4%), investment per employee reached approximately 2,806 Euro (+9.3%), 3% of turnover was invested*

- *The employment per company remained stable. The size of the companies is quite low (textile: 13, clothing: 9, total: 10) which explains why companies principally trade within the internal market .*

- *The Extra-EU exports reached 38,7 billion € or 22.6% - a growing share - of the global sales.*

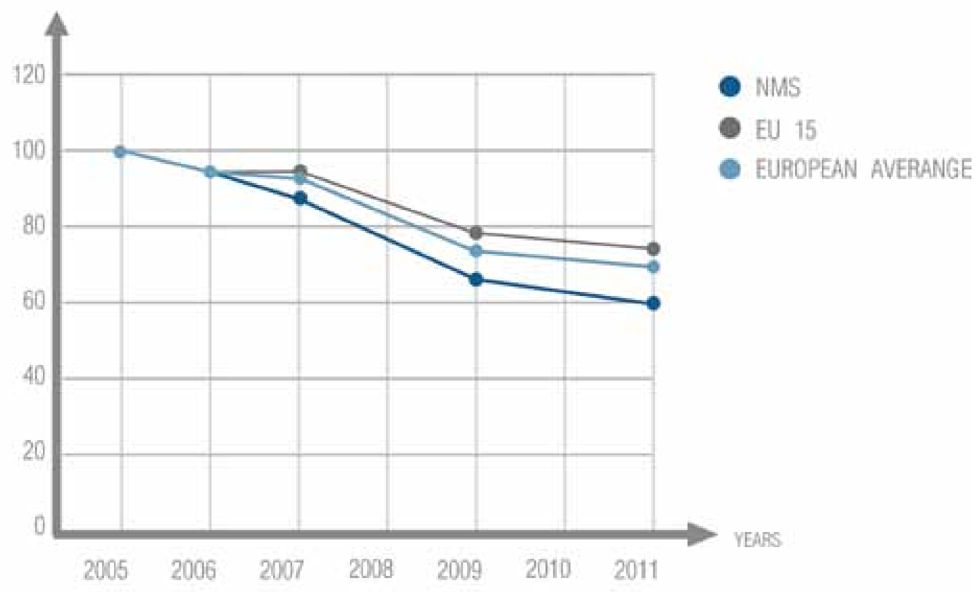
Source: Euratex estimates, 2012

Data used for the below graphs are collected from Euratex members and completed with estimates based on Eurostat data. However, it should be pointed out that Euratex members data are in most cases below reality due to difference in the coverage (companies size, definition, etc.).

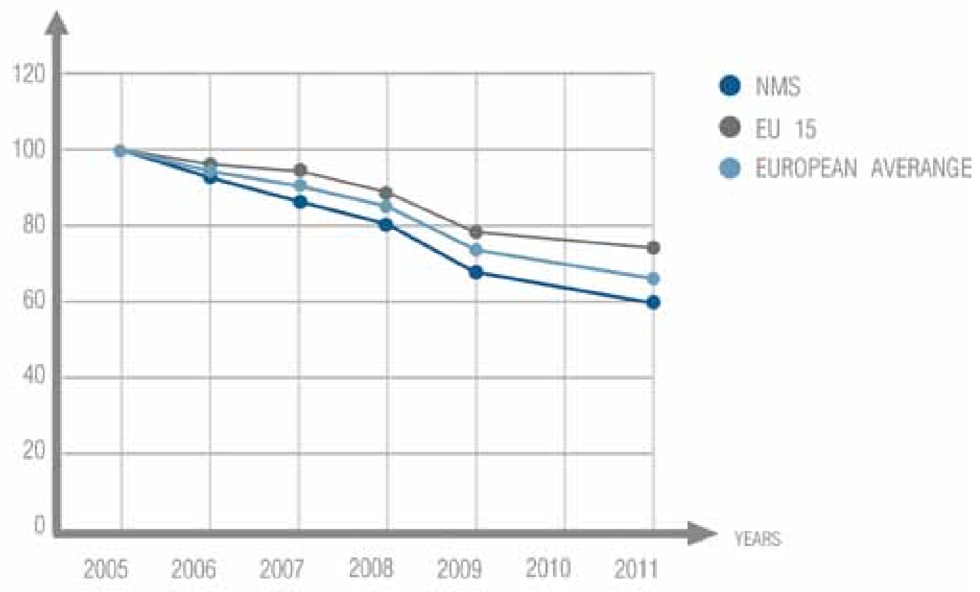
Therefore data in the graphs and in Appendix 5 are under-evaluating the reality as total EU should in theory capture the entire TC universe i.e. micro companies, countries data missing, etc Data in the frame have been estimated by Euratex in order to take into account all TC companies.

Since 2005, the employment evolution showed a similar picture in the textile and clothing sector, although the textile industry, especially in the new member states has suffered a relatively greater job loss.

EVOLUTION OF EMPLOYMENT IN THE TEXTILE INDUSTRY IN EUROPE
(2005 = INDEX 100)



EVOLUTION OF EMPLOYMENT IN THE CLOTHING INDUSTRY IN EUROPE
(2005 = INDEX 100)



Concerning the employment evolution and using the PROGRESS study as reference, we should recall that within a ten year period (1996-2006) the industry registered a loss of one third of production volume and jobs. One could fear that the phasing out of the Agreement on Textiles and Clothing would give these trends a further push. Today we cant do anything else than find that the decrease of employment even since 2005 has continued. During the period until 2010 we observed again a decrease with about one third of the jobs.

The tables in the appendix show clearly that not all countries are being hit equally so that nuance is needed. The restructuring of the TC sectors has been similar but not identical across the EU27:

- The Northern EU countries focused on technical textiles and specialties, while the fashion part of the industry saw the strategic role of retailers increasing (H&M, C&A, M&S) as well as the role played by department store and private labels. It is in those countries that most probably the landscape has the mostly changed with a strong delocalisation of the clothing manufacturing in more cost-competitive countries. Those countries registered the most significant switch towards higher level of skills type of job.

- In the Mediterranean Europe the focus on fashion and design remained vivid combined with the presence of substantial manufacturing capacities across the pipeline. In parallel there was the development of leading position in Brands through the development of retailing (Zara, Benetton, Italian Moda, French Griffes, Spanish casual). France remains a special case as it combined both the North and Mediterranean Europe approaches described above.

- Eastern European Countries faced the dismantling of a large share of native production facilities combined with significant presence of delocalized EU15 large companies favouring the maintenance of the making-up industry in the cut make and trim and subcontracting sectors, thus benefitting from lower costs of productions. Despite that employment decreased substantially as clothing manufacturing moved towards other low costs countries, Eastern countries continue to dominate

These evolutions show that Bulgaria as well as other new member states are pursuing their restructuring efforts and are enjoying higher productivity from a much reduced workforce. Higher productivity is needed to allow Eastern European countries to be in a better position to face international competition.

2.3. Evolution of employment in the leather sector

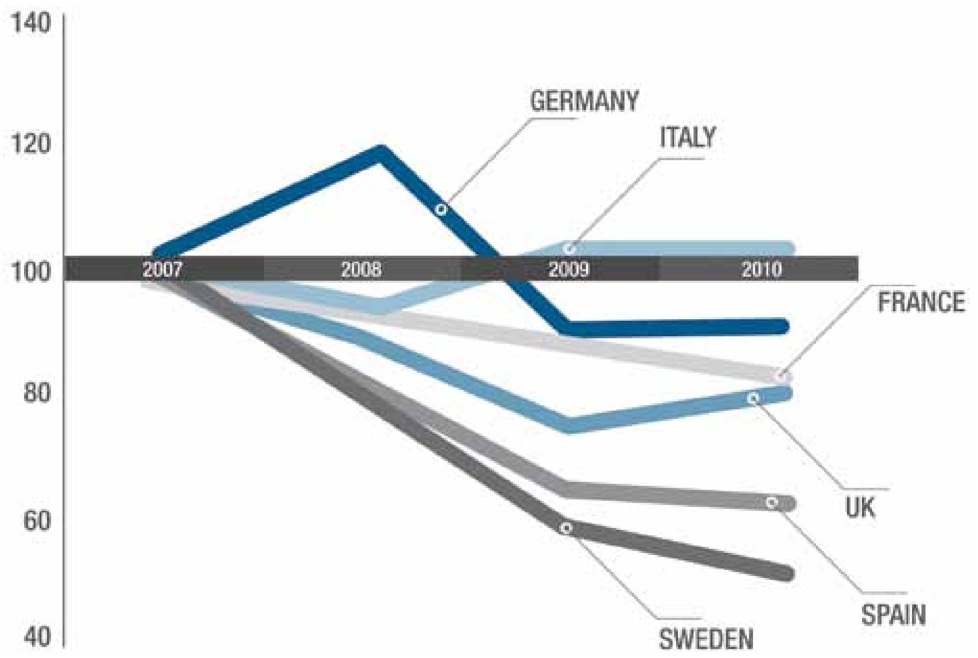
As mentioned previously, the available statistics on the leather sector are less complete than these on the textile and clothing sector.

The table in Annex contains the available Eurostat figures. But it is clear that this is far from complete and that the picture is clouded by a recent change in categorization and registration. It is therefore impossible to give a reliable picture of the evolution of employment on the basis of this material.

The Eurostat-figures for the NMS for the period 2008-2010 are more or less complete, and show a decrease in employment, similar to the situation in the textile and clothing industry.

The figures of the European employers' organization COTANCE reveal a subtle image of recent evolution of employment. There is a clear decrease of employment in the year of crisis 2009, but from the year 2010 on, we see a slight recovery in some countries.

EVOLUTION OF THE EMPLOYMENT IN THE LEATHER INDUSTRY IN EUROPE (SELECTION OF COUNTRIES ON THE BASIS OF AVAILABILY OF DATA 2007= INDEX 100)



source: COTANCE

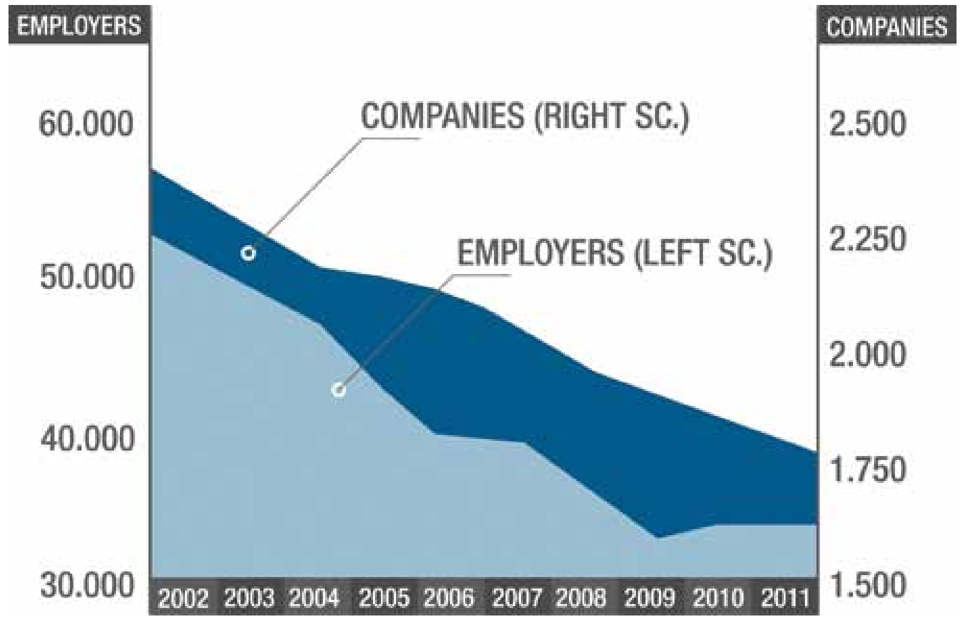
Every year COTANCE collects statistics from its members (national associations). These associations get the data either from the companies themselves or, in the case of Italy, through a complex formula by which they calculate the actual production on the basis of the net amount of raw materials available in Italy. Please note that even though few national associations do nott provide statistics, COTANCE data on Italy, Spain, France, Germany and United Kingdom do cover at least 80-90% of the EU tanning sector.

According to the last annual data available (2011), at present the tanning sector is composed of nearly 1,800 companies and 34,500 workers.

As outlined in the following graph, the trend in the last decade, following the production volume results, has been on the decrease for both elements: -25% for the number of companies, -36% for workers.

The sector has traditionally been composed by small and medium enterprises mainly, but big companies have not been missing. The average size of an EU tanning company is currently 18 persons per company and it is important to notice that in the year 2000 it was 24 with a continuous declining in the following years. This tendency 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 been giving a better response to the big changes characterizing the world leather market in the first ten years of the new century.

More actual figures on employment in the tanning industry (part of the leather sector) are the ones of Italy, having by far the biggest share (one third of all jobs) of the European leather industry. These figures (box below) have been provided by the Italian OSSERVATORIO NAZIONALE CONCIA (ONC), partner ISP within the ESC-TCL (UNIC, 2012)



Source: Eurostat, Entreprenuerial Associations

For the Osservatorio Nazionale Concia (ONC) partici pating in the ESC-TCL network, Italy traditionally represents the main tanning country in the European Union. Its share on total is around 62% in terms of total EU tanning turnover, 60% in terms of volume production and more than 30% of all jobs.

3. PROSPECTS ON EMPLOYMENT

The PROGRESS-report gives a rough sketch of three possible scenarios for the future of the TCL-sector up to 2020 summarised here below.

TCL sector up-to 2020

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. TCL 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 specialization in industrial manufacturing and the EU will strengthen its technological lead.

Production activities will largely disappear from European TCL 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 globalization on manufacturing employment (not only TCL employment), 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.

Source: PROGRESS report

Three years after publication, too few indications are available for privileging any of the three scenarios. Nevertheless, the employment evolution 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 bother the third scenario.

Further investigation is needed to check such hypothesis. One element favouring such cautious approach is linked to the positive developments acknowledged in certain part of the TCL sector.

For instance, the situation in the Italian tanning sector could evolve in a relatively favourable manner. Indeed, apart from a probable loss both in terms of volume and value in the current year (2012), the European tanning industry is supposed to present an overall stability in the next three-years period and a reasonable rising rate in the next 5 to 10 years.

This trend will probably characterize the sector workforce as well. The reason of a progressive recovery and rise is due to the fact that the big majority of the EU industry restructuring has probably come to an end and the competition from Asian countries will not be so aggressive as in the last decade (delocalization strategies have recently slow-down more and more).

There will be a rise in the EU leather manufacturing delocalization in the mediterranean area (and in the Balkans as well) but this is not a problem for the EU tanning industry. Some single tanning segments could be affected by an increasing shortage of raw materials, representing an extremely high obstacle to their future development.

Despite such type of evolution and based on our superficial considerations, today we cannot do other than joining the concluding words of the authors of the PROGRESS report saying that the future of European TCL industries is far from being decided.

This does not mean that in our analysis we disregarded the various actions taken within companies, sectors and institutions aiming at shaping different likely scenarios, particularly as far as it concerns skills mismatch and the response to be provided to overcome them.

In the following pages we will examine a few cases, as a supplement from the practice of the partner organizations of the ESC-TCL.

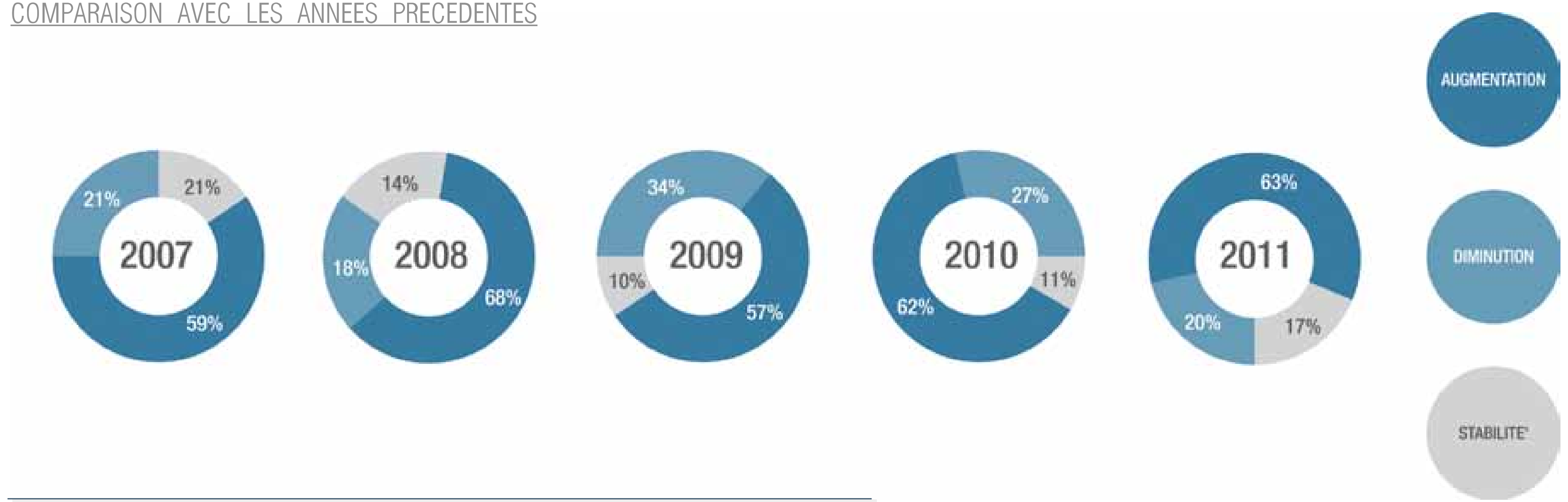
CASE: Evolution of the employment in France: the most positive prospects since 2008

On a regular basis surveys are conducted in France to record staff prospects in the sector. This happened most recently by FORTHAC (now OPCALIA) in the spring of 2011.

More than 1,520 companies, representing 78,000 workers, participated in the survey. The companies were asked about their employment prospects. Hereby they were not asked about precise, quantitative data, but about general trends for the different categories of staff. The survey of 2011 gave a positive picture of the prospects.

The negative outlook in the crisis year 2009 is clearly adjusted. The proportion of companies which reduce their capacity decreases and more companies consider an expansion of the workforce. Forthac speaks about a most positive outlook since 2008.

EMPLOYMENT PROSPECTS IN THE FRANCE TCL.
COMPARAISON AVEC LES ANNEES PRECEDENTES



TCL and sectoral labor market structure in France

The textile column in France counts about 116,000 jobs in 7,000 companies (Eurostat, 2010). France has a share of 5.3% in the European TCL.

For France the jointly managed observatory OPCALIA participates in the ISP-network. The audience of OPCALIA consists of nearly 186,000 employees from 8,500 companies in 2012. The differences with the Eurostat figures have mainly to do with the way the data is collected. The statistics come from the branche body OPCA to which companies pay an annual contribution. When they make their payments, they fill a document on which they are asked to indicate the distribution of their employees.

But just as in other countries, also the sector demarcation by the social partners is broader than the Eurostat-categories since it includes workers in the textile care to the working field of OPCALIA.

CASE: Employment in the Belgian textile sector Market orientation as determinant for moving skill expectations

In order to get a picture of the staff needs in the Flemish textile industry in the future, an analysis of the employment was carried out in 2010, 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 organization 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 for the 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 two percent, while the employment in demand-driven businesses continues to increase.

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 a in contraction scenario of 2% per year, for certain processes even more jobs are in the pipeline. 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, however, will occupy 88% of the workers in demand-driven enterprises. Given the close relationshi p between 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. The qualitative part of this study describes the competency expectations posed by such a demand-driven environment over the coming years. See further in this report

TCL and sectoral labor market structure in Belgium

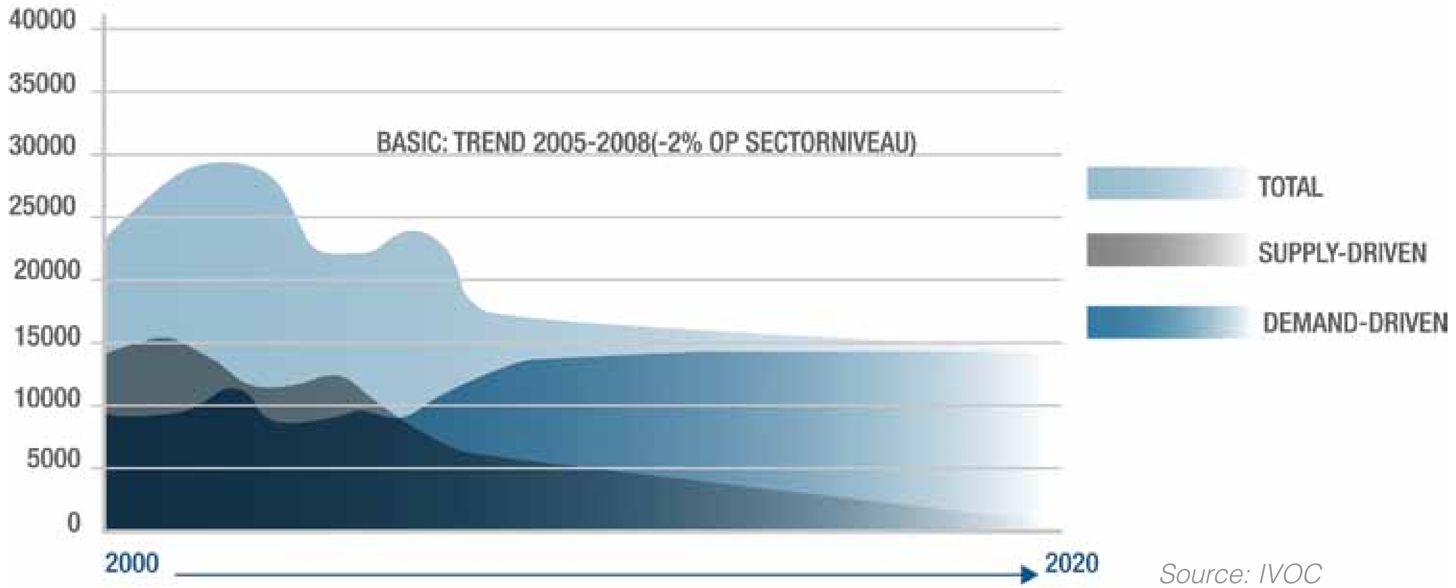
The textile column in Belgium accounts for some 27,000 jobs in 1,200 companies (Eurostat, 2010). Belgium has a share of 1.2% in the European TCL.

For Belgium, two training centres participate in the ISP-network. There is the training center for the textile industry, COBOT-CEFRET and other hand the training centre IVOC-IREC for the clothing industry and textile care.

in 2011 both organizations serve an audience of 43,500 employees from more than 3,000 companies, including a large group of micro-enterprises. Note that the sector delimitation by the social partners in Belgium is wider than that of the NACE codes.

The Belgium's textile care industry, accounting for about 6,700 jobs, belongs to the working field of the jointly managed ISPs.

MARKET ORIENTATION IN THE BELGIAN TEXTILE SECTOR



Source: IVOC

CASE: Positive drivers and a stable employment outlook up to 2020 in the UK

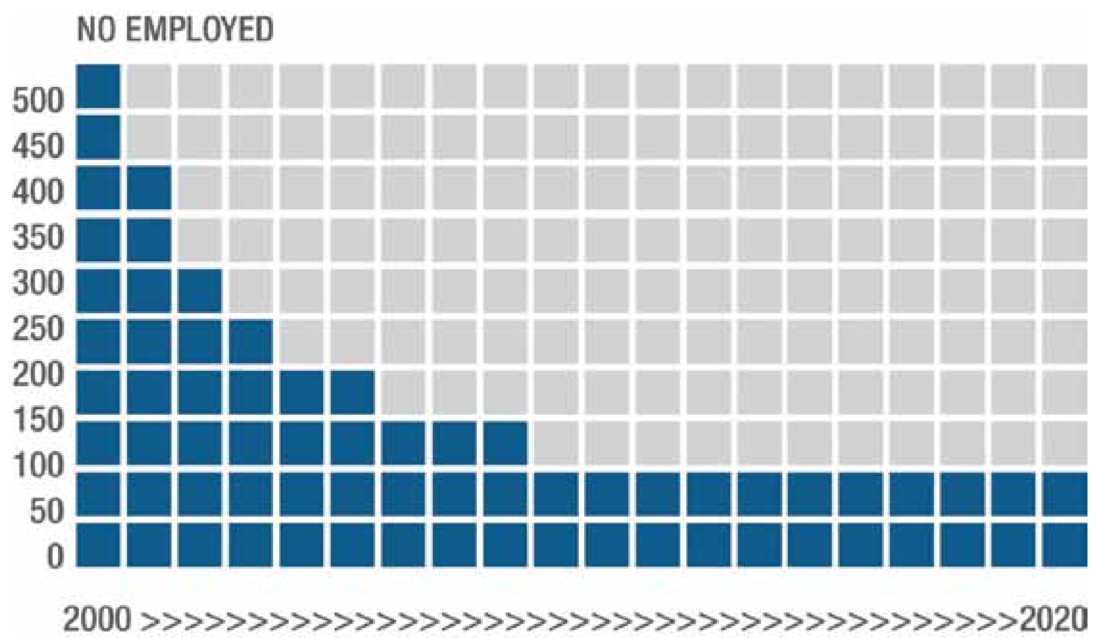
Estimates for textiles, apparel and leather manufacturing employment forecasts in the UK are taken from Working Futures 2010-2020 dataset published by the UK Commission for Employment and Skills (UKCES, 2012).

This model includes projections on employment as well as the occupations, skills and gender dynamics of the workforce. The forecasting data is derived from trend analysis based on indicative developments and although there is current uncertainty for the global economic outlook, should be seen as a robust benchmark for employment forecasting.

Creative Skillset is currently undertaking a complementary project to further contextualise this information to create their own forecasts based on a detailed analysis of sectoral drivers and their implications for future employment.

It is also important to note that the Working Futures data will not fully take into account the contribution of micro-employers operating below the Value Added Tax threshold. These are not represented within these estimates due to them being derived from data on employing businesses and those businesses over the Value Added Tax threshold.

TEXTILES, WEARING APPAREL AND LEATHER MANUFACTURING EMPLOYMENT ESTIMATES FOR THE UK



Source: IVOC Source: UKCES, (2012) Working Futures 2010-20 data. Based on SIC 2007: 13-15

The estimates for combined manufacturing employment within Textiles, Apparel and Leather show a stable outlook up to 2020.

This forecast follows a period of large scale employment losses in the sector up to 2010, as the UK textiles, apparel and leather manufacturing industries were exposed to factors such low-cost overseas competition.

However, given the number of positive drivers and opportunities identified and available for the sector in the UK at political, economic, social and technological levels, there remains substantial opportunity for positive net employment to be exhibited in the future.

Other key messages to highlight derived from this dataset include:

- *With an ageing workforce within the sector, the recruitment needs are therefore likely to be great as employers are required to replace this skilled workforce as they retire to remain competitive. Ensuring employers have access to new recruits is a key issue.*
- *At an occupational level, the forecasts suggest a continuing rise of the proportion employed within managerial, professional and associate professional positions within the sector. This suggests the continual ù movement and management requirements for technical, niche and innovative processes within the sector, coupled with decreases in skilled trades and machine operative level positions.*

TCL and sectoral labor market structure in the UK

The textile column in the UK counts about 100,000 employees from more than 8,200 companies. The UK has a share of 4.5% in the European TCL (Eurostat 2010).

For the UK the jointly managed Creative Skillset participates in the ISP-network. It's important to note that the definition of the Creative Skillset work field differs substantially from the Eurostat categorisation. Sectors such as trade and textile care are also part of the work field.

The employees within Creative Skillset's footprint is estimated to total 340,000 across Textiles, Clothing and Leather manufacturing, wholesale and after-care services. Creative Skillset splits the sub-sectors the following way:

- *Textiles (Including manufacturing and wholesale and technical textiles manufacture): 105,000*
- *Apparel, sewn products and commercial design (Including manufacturing, wholesale, commercial design): 156,000*
- *Footwear, leather and leather goods (inc manufacturing, wholesale and shoe repair): 27,000*
- *Laundry and dry-cleaning: 50,000*

In terms of manufacturing employment in scope for this project, it is estimated there are 166,000 people represented within the manufacturing. This is due to official data sources under-estimating the contribution of micro-employers within the sector and those businesses below the VAT threshold

4. ASSESSING EMPLOYMENT EVOLUTION: NATIONAL OF REGIONAL MATTER?

In the context of our analysis of the evolution of employment and prospects of employment one may note that the analysis of the employment per country has been partially abandoned.

Also in the working field of the partners of the ESC-TCL one can see that a more regional approach to the labour market situation in the respective sectors gets the upper hand, both in the UK, France, Belgium and Italy.

- A study by Trends Business Research (2008), highlights the important areas for Textile, Clothing and Leather manufacturing centres within the UK. 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, specialised in bovin hides and calfskins. Campania, in its turn, is specialised in sheep and goat leather are the three most important regions for the leather sector. Striking, in 2011, for the second consecutive year, all Italian districts grew at a fairly even rate, especially exports. Such analysis can be also done for the TC industry.
- In France, the 3 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 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 branch 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 the Footwear branch, the firms are very 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%). And finally, the firms in the Leather branch are mostly situated in the South West of France Midi Pyrenees with 34 % of the firms, and 24 % are situated in Parisian area.
- Finally in Belgium the activity and the employment in TCL is mainly situated in Flanders, that is the Dutch speaking part in the north of the country.

CASE: The clothing sector in Flanders, home of microenterprises

Flanders, the Dutch-speaking north of Belgium, is traditionally an important confection region. Over the past decades, the clothing industry has undergone a transformation. The great mass producers of yesteryear had to make way for a pronounced landscape of SME's.

The word clothing industry calls up images of clothing sewing workshops: large factory buildings with long rows of stitching machines, on each machine a stitcher who is responsible for an operation; large baskets with pieces of cloth at the first machine, a ready-made shirt, skirt or pants on the last machine. The faster everybody works, the more efficiently the work is organized, the more profit the company makes.

This type of company has almost totally disappeared from Flanders. Most companies could not compete with low-wage countries. The high cost of production often left companies no other choice but to outsource their production and often even to close their doors.

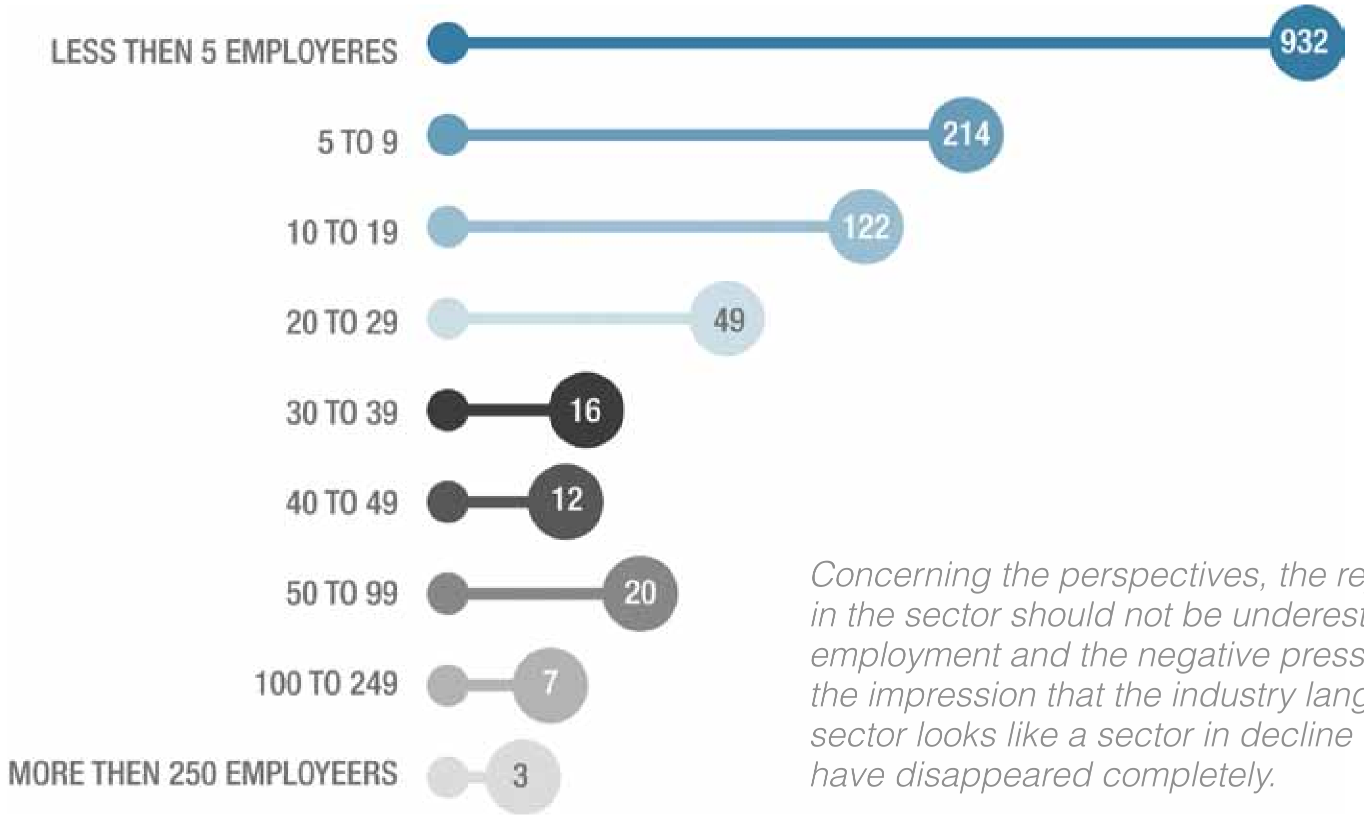
However, not all jobs and clothing companies have disappeared from Flanders. Over a period of 20 years the employment halved to 15,000 jobs today. Today the sector therefore looks completely different. This change has three important characteristics and implications for the skills needs. Firstly, the way we work has changed radically.

The development of the head-tail profile of the companies, in which design and distribution remained in Flanders, while the production was outsourced to low-wage countries, has implications for the organization of work and job content. All this is discussed in the reference material of this report, but in general it means that we are expecting of a stitcher today that she has to be able to put together a complete garment.

Secondly the sector has evolved into a SME sector. The average size of Flemish clothing companies today is 8.3 persons, the sector has therefore a strong SME profile. The graph below shows that there are hardly any large companies left in Flanders. It should therefore be appreciated that precisely the SMEs provide for employment and perspectives.

The training world has to adapt its offer to this situation, especially when we know that most companies have not only become smaller, but have specialized in niches and innovative products, either in the design, production or distribution and commercialization of different clothing items

DISTRIBUTION OF 11.437 WORKERS FROM FLEMISH CLOTHING COMPONIENS IN 2011, ACCORDING TO COMPANY SIZE (NUMBER OF COMPANIES)

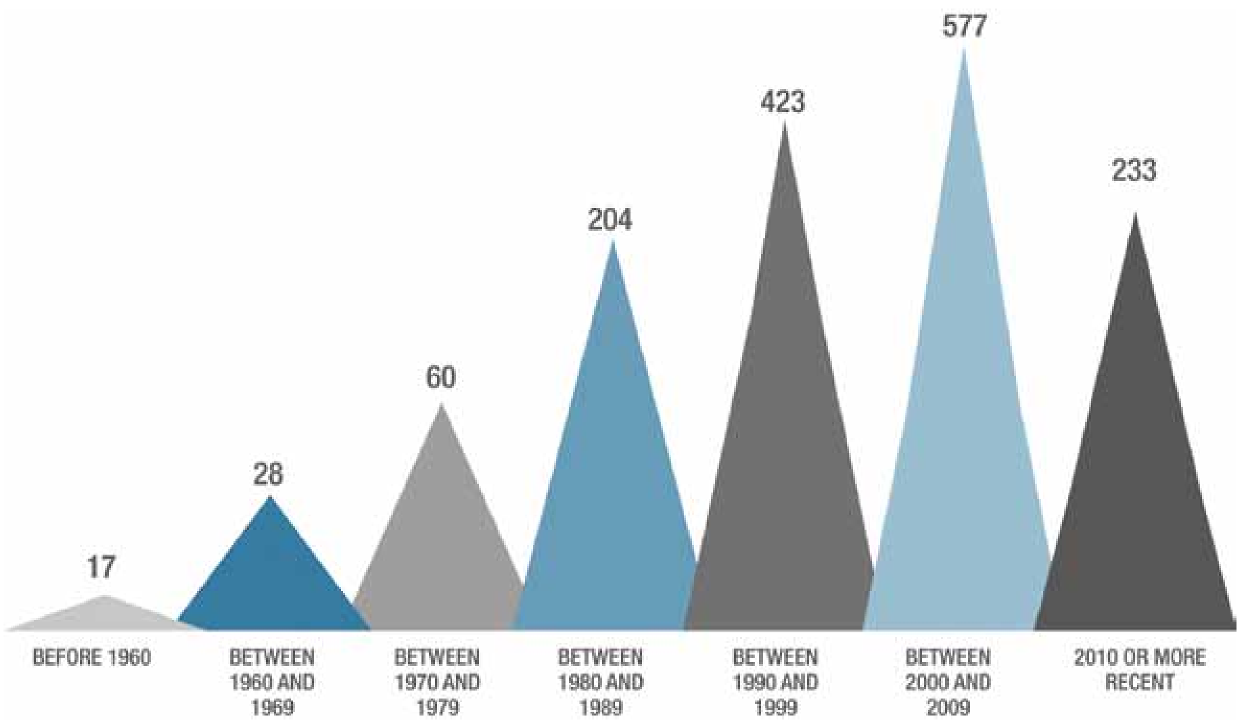


Concerning the perspectives, the rejuvenation dynamics in the sector should not be underestimated. The decline in employment and the negative press coverage give the public the impression that the industry languishes. The clothing sector looks like a sector in decline which sooner or later will have disappeared completely.

However, we note 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 of restarted this century.

Given the number of companies remains fairly stable in recent years, we can estimate the turnover at around 5% of the companies per year.

THE ESTABLISHMENT PERIOD OF 1542 FLEMISH CLOTHING COMPAINIES, ACTIVE IN 2012 (NUMBER OF COMPANIES)



In other words, the sector stays attractive. We can see that among other things in education, where many young Flemings (currently over 2000) opt for studies in a clothing branch.

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 methods.

5. SKILLS NEEDS HYPOTHESES

Within each future scenario for the sector, the acquisition of competences is crucial in sector and business strategies. Depending on the scenario, accents will differ and weights will shift.

As said previously the PROGRESS study (2009) offers in this area a still up to date and relevant analysis and recommendations. The in-depth study of 2012 will indeed confirm matters.

The starting point in the analysis presented in this part of the report, are the activities of the partner organisations, so the operations on the field meant to respond to the detected needs. These actions are built on a series of hypotheses which we are going to discuss as a state of art.
In particular, we discuss:

- The development of the competencies, as a credible and effective strategic responses to challenges
- The production technical competencies as central items in the future training plans and recruitment needs
- The dominance of specific, business strategies
- The place of basic skills among the priority areas of competences
- The importance of innovation and sustainability as key levers in the future developments
- The new breath, credibility and thus credits on the labour market the TCL seek

None of the hypotheses are generally valid, as it excludes conclusions for one country / one partner organisation to be translated to the situation in other countries or organisations. Yet each hypothesis is supported by field experiences, indications are also identified through research work. Thus these hypotheses play an important role because they form the basis of concrete operations, answering questions originating from the field and the choices done by the social partners.

5.1. Training as a strategic tool

The delocalisation 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. The development of the competencies of the human resources is a credible and effective instrument.

CASE: Increasing importance of training in the Italian leather industry

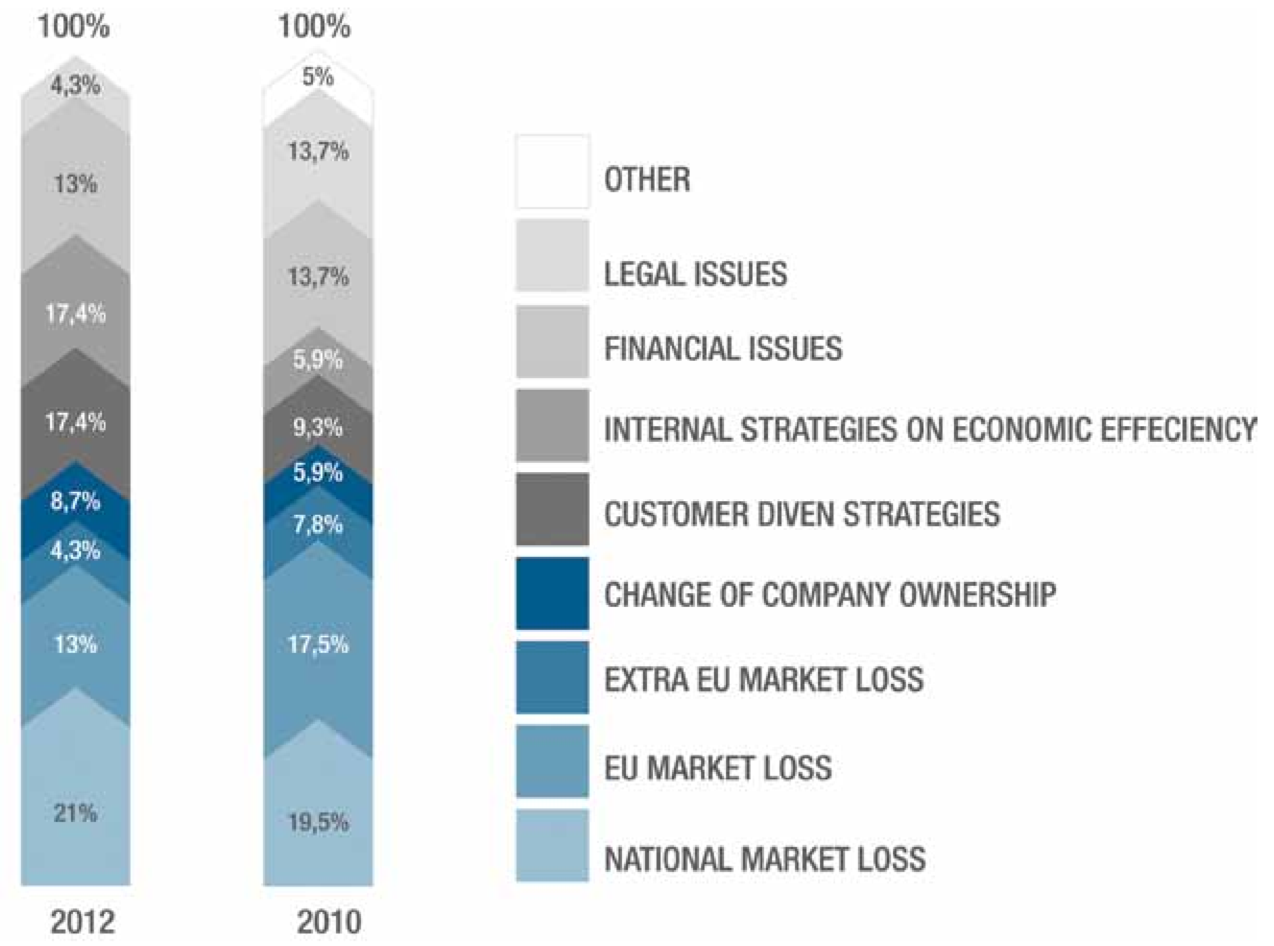
In order to gain insight in the prospects of the leather industry, the Italian Osservatorio Nazionale Concia (ONC) organized a double poll, first at European level (2010), then in Italy (2012).

ONC started from a survey of 2010 on the tanning sector at EU 27 level. In that survey ONC interviewed the main Industrial Associations and Trade Unions of the tanning sector at EU 27 level.

In 2012, ONC used the same questionnaire for a new survey to the experts of the 3 main districts (Veneto, Campania, Toscana), to Trade Unions and to the Economic studies department of the Industrial Organisation of tanneries in order to have an updated version of most of the data obtained with the survey in 2010, but this time data gathered are referred only to the Italian sector only.

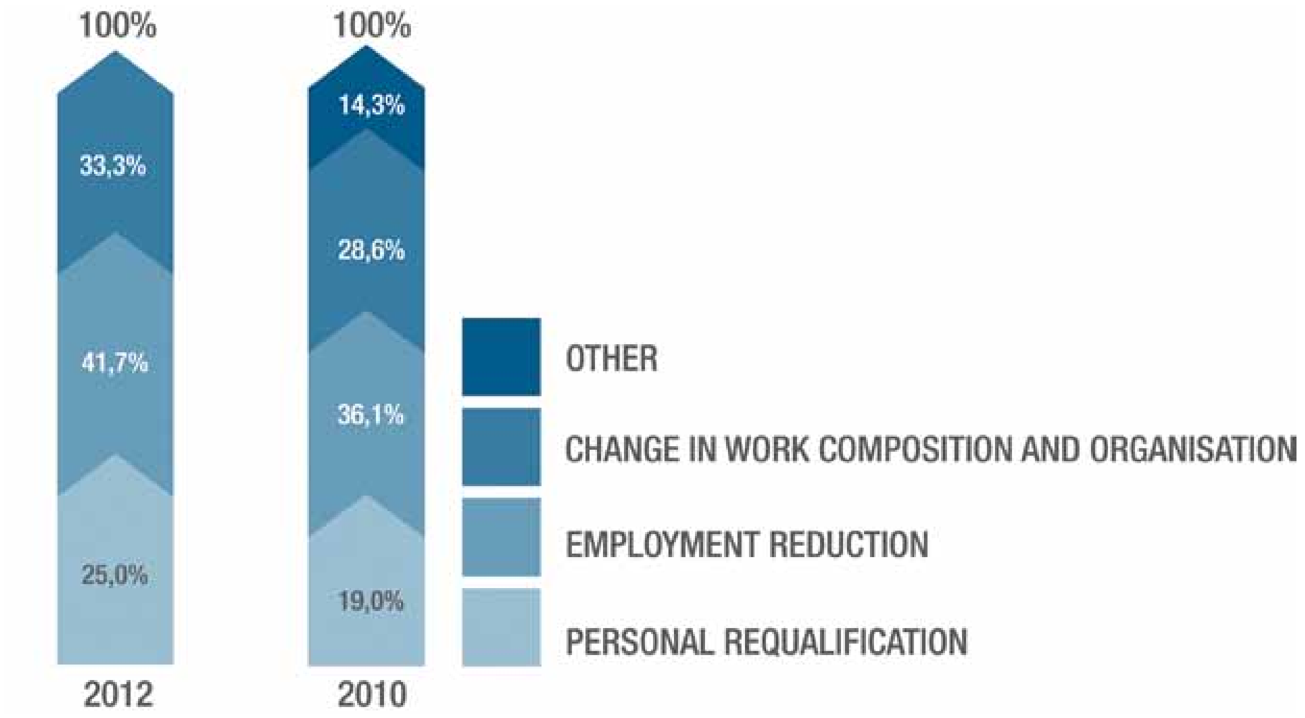
The questionnaire was meant to collect and organize information on the main factors which are expected to influence restructuring operations and training needs in the Italian Leather sector.

MAIN FACTORS INFLUENCING RESTRUCTURING OPERATIONS THAT TOOK PLACE IN THE NEAR PAST



Source: ONC, survey

The graphs show the weight of the different factors that form the basis of restructuring operations within companies and the way companies deal with them. We note that the retraining of staff is recognized by managers and consultants as a possible option to respond to changing market conditions.



In the future the Italian experts expect an increasing need to take measures to improve economic efficiency. The retraining of personnel is becoming increasingly important to face these challenges. The percentage rises from 25% further to 40% of the scores.

These developments have had a clear impact on the composition of the sectorial labour market. Low specialized production workers lose shares of employment in favour of highly specialized workers, sales staff and - remarkable - also R&D employees, including designers. Finally, in future a particularly strong growth in the share of commercial employees (up to 26% - meaning a percentage) is expected.

5.2. Competencies for production functions are central

With different scenarios appear new competencies in the strategic recommendations of the consultants. Former secondary issues emerge as new core competencies on the foreground; For instance, the importance of logistics and commercial skills should appear among the recruitment needs of manpower planning of a growing number of more and more companies. Indeed, in many companies trade has taken the place of production.

Nevertheless, precisely the production technical competencies stay central in the future training plans and recruitment needs, even in the countries that massively repelled production activities until recently.

Despite the job losses in the TCL, the demand for motivated and versatile staff members remains, to absorb the annual staff turnover. To counteract the competition, staff has to become polyvalent, adaptable and flexible and this impacted the type of training demand.

Certainly since the early 90s its clear that training in TCL 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 trained in polyvalence in order to be allow employees to work on different workstations. In periods of shortage, this allows production to continue.

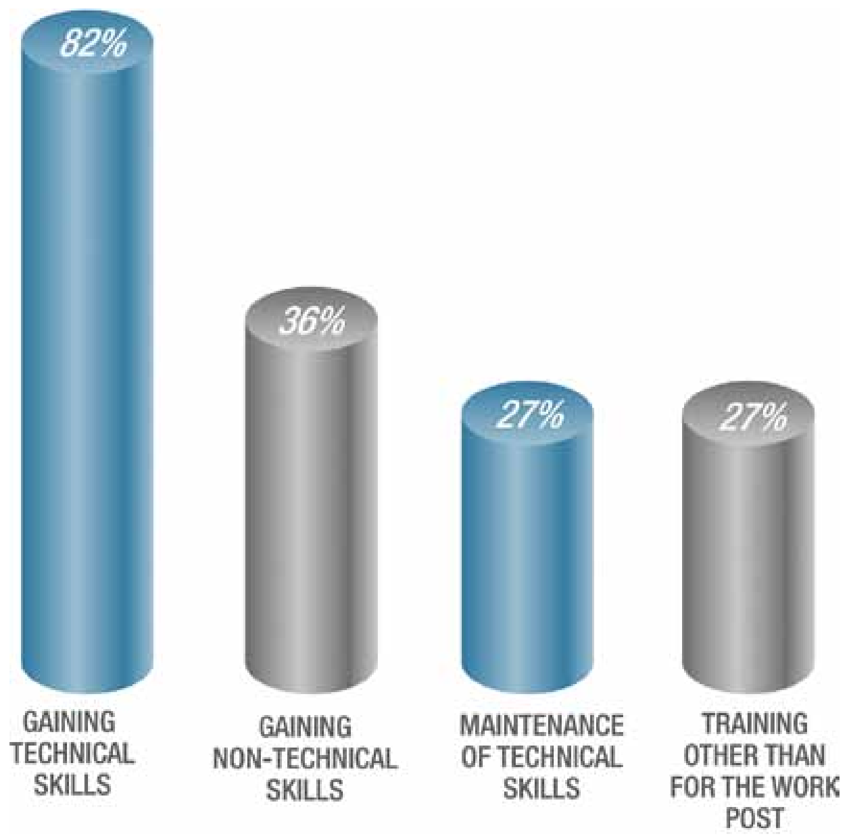
Supporting the polyvalence of the workers is by far the most important action field of jointly-managed sectorial training centres.

CASE: Le savoir-faire in the textile companies in the French Vosges

The French Textile Syndicat de l'Est examined in the autumn of 2011 the competency needs of the textile companies in the French Vosges. 14 companies, representing a workforce of 1,260 employees were questioned. Companies employ a working population with little or no diploma, but a population regularly trained internally by the companies to acquire the needed skills.

The researchers found that by far the most important question has to do with the acquisition of technical skills related to the work station.

MAIN OBJECTIVE OF TRAINING IN 14 FRENCH TEXTILE COMPANIES IN 2012

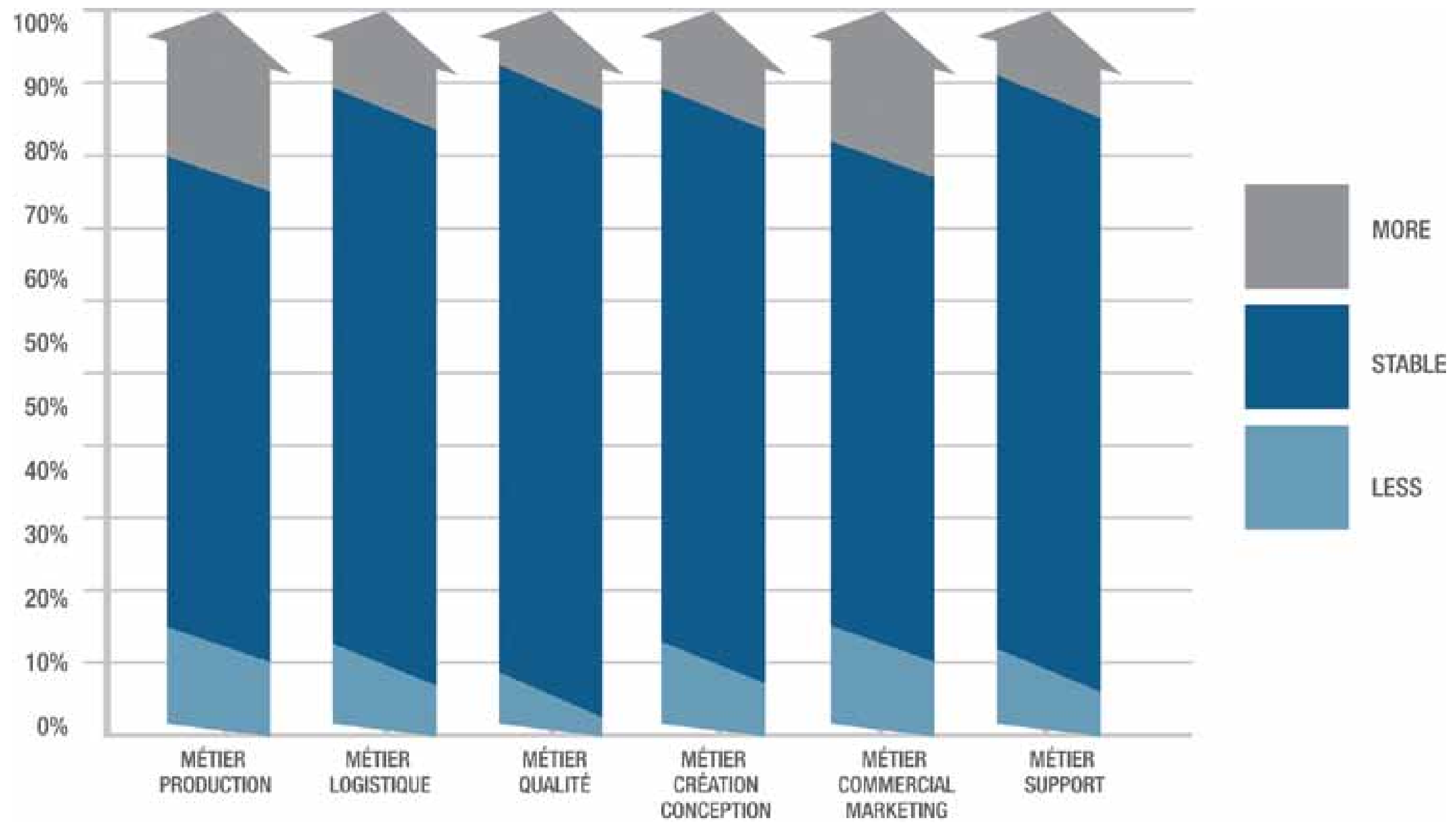


Source: Syndicat Textile de l'Est, France, 2012

The training mainly takes place in the framework of company training plans. The trainings are mainly internal training or provided by suppliers (eg machines). Mentoring begins to attract companies, the researchers conclude.

The broader studies of OPCALIA indeed confirm the findings from the Vosges. For example, a recent analysis of the outlook for various staff categories shows the ambiguous significance of the production functions.

It is precisely in this category that most companies prospect a reduction of the effective, against an equally large group of companies that are just looking for additional production personnel.



5.3. Business strategies prevail

A key finding of the above mentioned study of the French Textile Syndicat de lEst brings us smoothly to the following hypothesis.

The researchers examined the developments regarding the importance for the future competence and recruitment needs. It is noteworthy that most companies mention technical progress and new technologies as engines for future competence, but additionally the respondents indicate also challenges and opportunities specific to their business or companies. It is indeed not easy to discover a general and common path in these developments.

Similar findings are to be found in other studies. For instance, the Belgian Tempera-research that specifically examined the future competency needs for 9 core functions in the textile industry, delivers a nuanced picture of the developments.

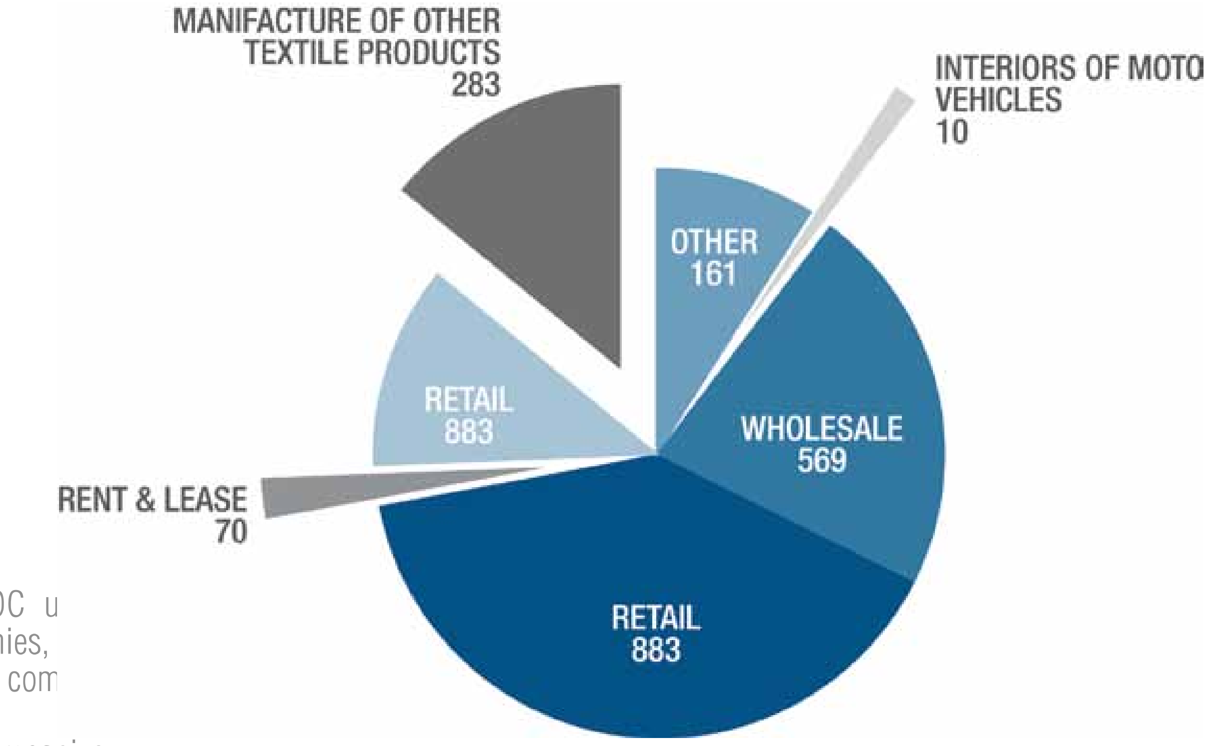
Employers or personnel managers are frequently divided in their opinion on the importance of trends for the future skills requirements. The analysis shows that individual companies often follow their own course, also in terms of their HR-policies and the way they look to the future.

The predominance of specific business strategies also emerge from the training that IVOC accompanies in the Belgian clothing industry. To get a good overall view of the needs in the sector, IVOC organizes a biennial survey among all companies in the industry. Besides IVOC-research, especially the concrete experiences with training on the field are important for a good view of sectoral needs.

The main sources of information are indeed the actual IVOC u IVOC accompanies corporate training in nearly 130 companies, accounting for around 2,500 skilled workers per year. The com training that IVOC thus registers, gives a good view of the competence needs. It is clear that this is simply about companies using IVOC services (around 5% of all firms).

But we can conclude that the individual training plans are very different; each company has its own profile indeed, for much the result of the restructuring processes of the sector during the recent decades. The diversity of current sub-sectors (NACE-activities) in the relatively small Belgian clothing sector, which until a few decades was much larger and more homogenous, is illustrative in this respect.

VIEW OF THE SUBSECTORS (NACE- SECTIONS) OF THE BELGIAN CLOTHING SECTOR IN 2011 - NUMBER OF COMPANIES



5.4. Basic competencies in the spotlight

Probably there is a strong link with the recruitment difficulties, but we find that firms largely mention psychosocial elements, when asked about their recruitment needs.

In their quest for tufters, for example, Belgian textile companies initially expect motivation, willingness to learn and accuracy, so skills that seem to compete with the technical competencies (Tempera, 2010). That basic skills are among the priority areas of competences for our industries has everything to do with the trends shown in other domains and the profile of the workforce.

Basic competencies are indeed vertical and integrating. For example, the relatively high intake of vulnerable groups, ethnic minorities in particular, systematically tightened the focus on basic skills, knowledge of the national language in the first instance, during the last decades.

As in all sectors, the workforce in TCL is far from homogeneous. But more than the other sectors, the TCL provides employment opportunities for the groups at risk, so the diversity in the sector becomes increasingly visible. Cooperation between workers of different ages, abilities, backgrounds and cultures is an absolute must in any business.

By keeping on the agenda the discussion on diversity issues and also through appropriate training, the jointly-managed sectorial training centres try to facilitate cooperation and the integration of the various categories of employees.

The internationalization impacts the type of basic skills needed, for instance, basic IT skills, became a must for several categories of workers, also production personnel. Further, the increased importance of cooperation and teamwork is at the basis of the communication and collaboration skills that every employee must master. Indeed, the basic competencies ensure the broad employability of workers, not only within the company, but of course also beyond.

CASE: Skills priorities for employers within the UK

A survey of 2,059 employers within the Fashion and Textiles sector as represented by Creative Skillset in 2008 found a number of common themes employers were looking to address.

Given the duel problems of an ageing workforce and the issues with perception concerning employment within the sector, recruiting and retaining able young people was a major priority to all employers, as was improving sales and marketing skills, improving basic numeracy, literacy and other basic skills and management and leadership skills.

Sub-sector nuances exists among the industry and can be illustrated by the following example: employers emphasised the needs for the design sector to find graduates with the right practical and commercial skills whilst indicating the importance of innovation and technical requirements within the sector. Moreover, textile and design employers both saw attracting science and technology graduates who can help to develop new products and processes.

The survey also identified the importance of the availability of skills training supply across the sub-sectors as accessing training was something employers were keen to source, especially given many employers within the sector are micro employers for whom accessing training is difficult due to cost, time and availability of delivery. Therefore many employers identified as priority the need of: improving the quality of in-house training, finding colleges and/or training providers that can deliver relevant training in technical skills.

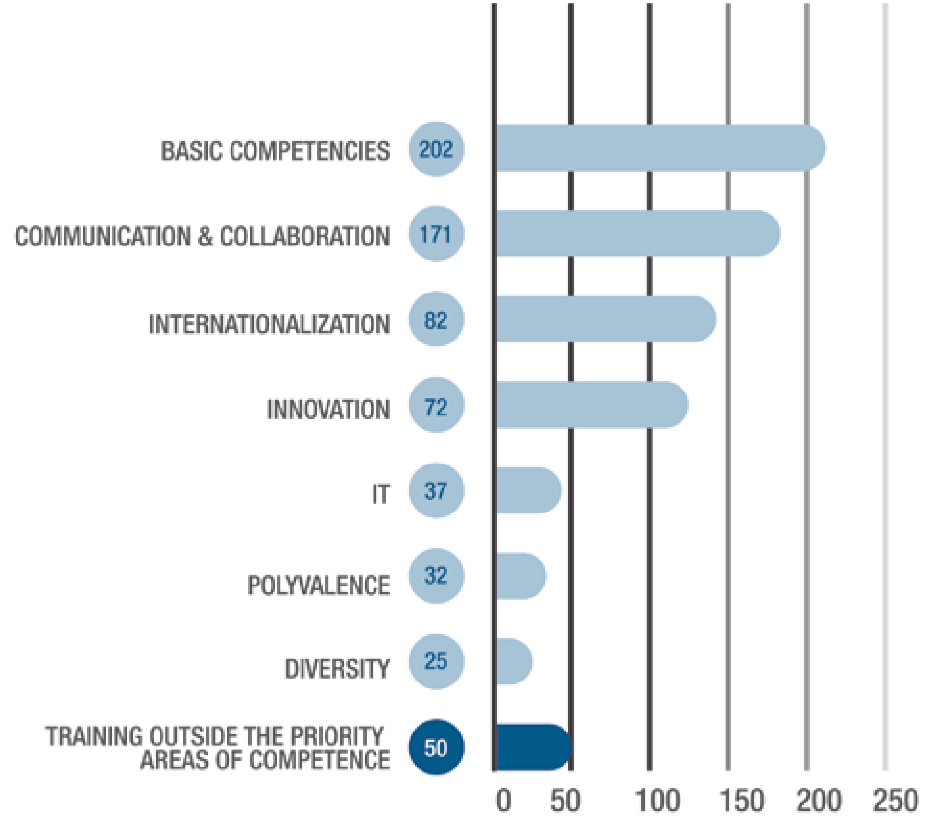
SKILLS PRIORITIES FOR EMPLOYERS FROM THE EDUCATION SYSTEM
(EMPLOYERS RESPONDING IMPORTANT OR VERY IMPORTANT TO EACH OF THESE AS PRIORITIES)

	TOTAL	APPAREL & SEWN PRODUCTS	DESIGN	FOOTWEAR & LEATHER	LAUNDRY & DRY CLEANING	TEXTILES
Recruiting and retaining able young people to replace workers who are nearing retirement	48%	45%	41%	51%	52%	58%
Improving sales and marketing skills, including the skills needed for international trading	48%	51%	58%	41%	40%	65%
Improving numeracy literacy and other basic skills	48%	45%	41%	51%	52%	58%
Improving management leadership and supervisory skills	47%	43%	54%	44%	53%	61%
Improving the quality of in-house training, e.g. through development of in-house coaches	42%	38%	47%	44%	51%	47%
Finding colleges and or training providers that can deliver relevant training in technical skills	39%	38%	54%	42%	32%	51%
Finding graduates with the right practical and commercial skills and knowledge	27%	30%	52%	24%	16%	34%
Implementing new productivity techniques such as lean manufacturing approaches	24%	25%	29%	17%	21%	37%
Attracting science and technology graduates who can help to develop new products and processes	16%	15%	23%	12%	14%	23%
Bringing in and training migrant workers from Eastern Europe and elsewhere	11%	9%	10%	10%	17%	11%

Source: Fashion and Textiles survey of employers 2008 weighted base. n.b. Composition of these sub-sectors includes wholesale and repair functions where applicable across the Creative Skillset footprint.

CASE: Basic competencies on top of the priority areas of competences in the training plans of Belgian clothing firms in 2013-2014

DISTRIBUTION OF 671 TRAINING ACTIONS IN 61 CLOTHING AND TEXTILE CARE COMPANIES IN PRIORITY AREAS OF COMPETENCE (FROM THE TRAINING PLANS FOR 5707 EMPLOYEES, PROGRAMMED FROM 2013)



During the summer of 2012 IVOC updated sectoral training needs. All Flemish companies that use IVOC services in 2012 (96 companies) were involved in the survey, 61 of which participated. In this way, we obtained a view of the training activities starting from the year 2013, for about 5,700 employees in Flanders clothing industry, accounting for about a third of all workers in the sector. In total in 2013-2014 already 671 different courses are scheduled.

5.5. Innovation and sustainability pull on

Both innovation and sustainability are key words in the more optimistic scenarios for the TCL. It should come as no surprise that these themes are in the workspace of sectoral organizations, both employers and employees representatives.

Today, many companies focus to a specific niche or deliver a highly specialized product. On top of that their markets and opportunities are in constant change: the production and work organization must be continuously adapted to market requirements. To be able to deal with these changes, flexibility and adaptability are necessary. Common paths in the policies of more and more companies are indeed innovation and / or sustainability. The social partners also see innovation and sustainability as key levers in the future developments in the sector as innovation and job creation are indeed intimately linked. Finally, among the tasks of jointly-managed sectoral training centres we can find the support to innovation and sustainability in their sectors. They will often be backed, both institutionally and through private initiatives.

CASE: UK Fashion Futures - Five lessons in sustainability

The starting point of this initiative was in 2007, the Forum for the Future's report Fashioning Sustainability highlighted the fact that the fashion industry was locked into a cycle of unsustainability.

One had calculated that the fashion industry was using relatively large amount of the earth's resources and in some cases exploiting cheap labour supplies in return for ever-decreasing profit margins. Competition and lack of supply chain transparency both contributed for driving down both costs and social and environmental standards.

On the plus side, the industry has already demonstrated an impressive capacity to adapt and create space for change. Following the first wave of 'ethical consumerism' in the late 1980s, for instance, retailers adopted codes of conduct to end relationships with suppliers who exploit workers, and set out to improve labour standards.

Fashion Futures has led to the identification of five key lessons to be adopted by the sector:

- *Prepare for a radically different and uncertain future: Companies should put strategies in place for a variety of scenarios. They should carry out a risk assessment of their business models and supply chains; put together a sustainability roadmap covering the full product lifecycle; and ensure they understand the social and environmental context in which their products and services are used.*
- *Seize the opportunity to be a trailblazer: Companies can gain first mover advantage by taking action on quick wins, such as energy efficiency. They can also benefit from taking the lead in talking to consumers and investors about the importance of sustainable production and consumption, lobbying government and driving collective industry action.*
- *Put change into practice: In a world which is changing rapidly and unpredictably success will depend more than ever on being flexible and innovative. Companies should invest in design and innovation; explore new business models and ownership structures.*
- *Look out for unexpected competition: Many different industries now play a part in the fashion industry, from Information and Communications Technology (ICT) and sport to supermarkets and pharmaceuticals, and new competition can emerge from unexpected areas. Companies should embrace alliances with new partners where this can enable sustainable growth. They should also consider how to apply their core competencies to new markets.*
- *Develop skills for a new world: Companies should start developing the skills they will need to be successful in the future. The industry will need climate change experts, water policy specialists, innovators with skills in design for disassembly and closed-loop manufacturing and many more. Businesses should also explore trends where the customer becomes a supplier or designer*

5.6. Sectors seeking new place in the economy

TCL once belonged to the major industrial sectors in Europe. The role the TCL have played in building our wealth should not be underestimated. After phasing out the mass production and the mass employment, the share of the TCL in most countries dropped to the lower end of statistics. Arguments such as job creation became exhausted. In different countries, we find that the TCL look for a new breath, credibility and thus credits for the labour market. Evidence of this are the studies on the significance of our sectors for the (national) economy

CASE: In search of the meaning of the UK Fashion Industry

The British Fashion Council proposed in 2010 a broad evaluation of the value of the UK fashion industry. Whilst the principal focus of the study was on generating a robust estimate of the economic value of the sector, attention was especially paid to the industry's wider impacts, the so-called indirect and induced impacts.

The results of the study indicate that the UK fashion industry makes a significant contribution to the UK economy, both in terms of Gross Value Added (GVA) and employment, whilst also providing considerable support to the UK Exchequer.

It was calculated that every £1 million of GVA in textiles creates an additional 42,5 jobs. Compared to business services, creating only 28.8 jobs against the same GVA, the fashion industry gains relevance.

ESTIMATION OF THE CONTRIBUTION OF THE UK FASHION INDUSTRY TO THE EXCHEQUER

	DIRECT	INDIRECT	INDUCED
EMPLOYMENT	815.5	216.9	276.9
MEAN WAGE	26,470	26,470	26,470
GROSS INCOME	21.6	5.7	7.3
INCOME TAX	2,741	729	931
INDIRECT BY EMPLOYEES	2,871	764	975
GVA	20,928	7,681	8,597
GROSS OPERING SURPLUS	4,967	1,823	2,040
CORPORATION TAX	1217	447	500
VAT ON FASHION PRODUCTS	6,367	N/A	N/A
TOTAL TAX INCOME	13,196	1,939	2,406

Source: British Fashion Council, 2010

Besides the quantitative analyses, the report focuses on more qualitative characteristics of the sector and the structure of employment, the labour force diversity in particular: indeed, one of the wider benefits of fashion was that it provides opportunities for labour force groups that typically find it harder to find a job, be that in terms of gender, ethnicity or age:

- *71.6% of workers in the UK fashion industry are female, compared to 50.3% of the population of working age and 46.8% of those with jobs.*
- *In terms of ethnicity, the UK fashion industry labour force has a similar make-up to the rest of the UK economy, although - due to a higher share of Asian workers - overall it is more ethnically diverse. 86.1% of all fashion employees are white, a slightly lower proportion than the population of working age (88.7%) and the employed (90.7%).*
- *One of the most remarkable aspects about the employees in the UK fashion industry is that they are much younger than the rest of the UK economy. Overall almost 50% of employees are aged under 30, despite the fact that less than 30% of the population of working age fall into this category and less than 25% of those who are employed.*

This latter is a finding which is certainly not consistent with the ageing that we see in TCL in other countries. It must be said that this report includes Fashion retail too, which is an enormous contributor and thus explains the age of the workforce being lower.

In any case, it's an argument not to extend conclusions for one situation to another.

6. CONCLUSIONS

Unfortunately, today the rather pessimistic scenarios for our sectors seem to become true. The further decline in employment, even in the NMS, is worrying the industry and policy makers.

This 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 future sectoral policies.

This is not only true for social partners, but also for companies the companies themselves see the opportunities and stab energy in building a future.

In addition to the relocation of the activities, many TCL companies adopted other strategies linked to innovation, flexibility, diversification and HR, often with good results. These ensured that activities are maintained in place despite less favourable cost-benefit structure. It remains difficult to face competition from low-wage countries, but it works provided companies are putting on the market products of quality that are innovative an sustainable; two elements that are priorities for the future preservation of TCL operations.

But innovating and putting a sustainable good product on the market, will never be a success without the people who have to make it become real. Therefore, the TCL is still looking for motivated and skilled employees.

Concerning these labour market opportunities, the specific profile of the employee in TCL should not be overlooked: not only the TCL is a workspace for technical, commercial and creative talents but the TCL is also a leading contributor to diversity. Undeniably, opportunities for women in technical professions, disadvantaged groups and an international audience are wider in TCL than in any other industry.

Even if the TCL play a modest role in the global, European economy, the meaning of TCL varies greatly from country to country. Consider the TCL in the new member states, but also in the EU15 the TCL continues to play its role in the economy and in the labour market throughout all its facets: fashion, technical textiles, manufacturing, vertically integrated companies.

By focusing on the regional location of the TCL in Europe, and hence renouncing to a certain extent at the national definition, we discover the real dimension and opportunities offered by the TCL. It must indeed be clear that the TCL companies in an increasingly integrated Europe should be appraised, in the first place, as engines for development and future for the regions themselves.

It is precisely in this field that the ISPs must play their role. The different hypothesis and arguments analysed in this report using results from the field did show consistency and confirmed that the deployment of ISPs can be effective.

Exactly how this works, how ISPs are organized and what their outputs are, is the subject of the following two reports from the European Skills Council for Textile, Clothing & Leather.

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EVOLUTION OF EMPLOYMENT IN THE TEXTILE INDUSTRY IN EUROPE
NACE13-TEXTILES (MANUFACTURE OF TEXTILES

	2005	2006	2007	2008	2009	2010	2011	AVERAGE YEARLY EVOLUTION
Sweden	5011	4508	4399	7018	6151	6241	6172	3,86%
Netherlands	10405	10148	10088	13403	12260	12128	12079	2,68%
Germany	93439	87408	97558	88793	79907	79657	80525	-2,30%
Poland	61962	62456	62799	58634	54310	53210	52838	-2,45%
Austria	15187	14762	14570	13346	12118	12530	12655	-2,78%
United Kingdom	80000	72000	68000	63754	59673	65044	66344	-2,84%
Cyprus	612	558	566	502	491	516	502	-2,99%
Italy	183950	178845	173934	168020	157403	149022	142413	-3,76%
Belgium	32079	30145	28709	27430	23531	22090	21208	-5,65%
Portugal	81904	75522	71156	64562	59015	56418	53654	-5,75%
Bulgaria	37176	36652	36395	36940	30000	27420	23773	-6,01%
Finland	5049	4860	4749	3940	3496	3226	3191	-6,13%
Spain	95100	86700	81930	71280	63083	59989	58069	-6,49%
France	81134	74874	71234	56622	50698	48131	46831	-7,05%
Czech Rep,	46030	42730	38614	32296	28004	26432	26511	-7,07%
Hungary	24461	20092	14460	12555	12676	11733	12548	-8,12%
Romania	50729	45217	40648	36171	28669	28068	26000	-8,12%
Lithuania	14859	14738	13146	10033	7784	7148	7484	-8,27%
Denmark	6891	6987	6817	5189	3761	3340	3317	-8,64%
Slovenia	10000	8875	8354	6582	5578	4270	3981	-10,03%
Slovakia	14230	13130	13000	6812	5344	6040	5629	-10,07%
Estonia	10142	9069	7724	6116	4424	4390	3998	-10,10%
Malta	1088	795	693	483	434	422	426	-10,13%
Greece	26300	25122	25000	22900	13627	11820	9640	-10,56%
Ireland	5830	5130	4771	2358	2527	1636	1610	-12,06%
Latvia	10004	8604	8966	3698	2572	2483	2572	-12,38%
TOTAL	**1003571**	**939927**	**908282**	**819437**	**727536**	**703403**	**683972**	**-5,31%**

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…

EVOLUTION OF EMPLOYMENT IN THE CLOTHING INDUSTRY IN EUROPE
NACE14- CLOTHING (MANUFACTURE OF WEARING APPAREL)

	2005	2006	2007	2008	2009	2010	2011	AVERAGE YEARLY EVOLUTION
Malta	2685	2575	1900	612	408	396	401	-14,18%
Ireland	3014	2653	2467	1765	1432	1177	1221	-9,92%
Finland	4126	3766	3443	3101	2294	2097	1862	-9,14%
United Kingdom	87000	83000	77000	35936	32040	39561	40352	-8,94%
Spain	105500	99900	92310	79387	65892	59221	54661	-8,03%
Cyprus	1420	1326	1246	1149	1003	767	746	-7,91%
Romania	278211	260461	232852	208455	169190	155507	147000	-7,86%
Estonia	11289	10732	10458	9142	7428	6668	5975	-7,85%
Greece	40100	39600	38900	37180	29541	27280	21360	-7,79%
Lithuania	39656	35526	31403	26910	22011	20546	21573	-7,60%
Hungary	37823	31255	28261	25406	23935	21720	20809	-7,50%
Slovenia	8779	8327	7728	9498	5619	5193	5129	-6,93%
Poland	172883	165563	167934	150291	127508	110920	107703	-6,28%
Netherlands	5861	5768	5820	4647	3873	3667	3652	-6,28%
Bulgaria	144689	144978	132365	136004	117184	106030	103061	-4,80%
Latvia	15364	15507	14514	11972	9720	9993	11192	-4,53%
Belgium	6515	6000	5974	5874	5385	5131	4875	-4,20%
France	54890	52286	49298	50947	44443	42875	41846	-3,96%
Slovakia	25805	25128	21822	21716	17394	20308	20064	-3,71%
Portugal	119361	111315	109179	103700	98130	94511	93188	-3,65%
Germany	53816	52309	50633	50472	46337	45624	44590	-2,86%
Italy	340980	337828	339038	340196	324877	309607	304515	-1,78%
Czech Rep,	30012	25993	23664	25354	27172	26581	26953	-1,70%
Sweden	1269	1239	1183	1965	1744	1345	1194	-0,98%
Austria	8246	7760	9350	9150	8650	8000	7800	-0,90%
Denmark	9609	10224	10789	11130	11069	10504	11009	2,43%
TOTAL	**1608904**	**1541019**	**1469532**	**1361959**	**1204279**	**1135230**	**1102733**	**-5,24%**

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…

EVOLUTION OF EMPLOYMENT IN THE TEXTILE INDUSTRY IN EUROPE
NACE13-TEXTILES (MANUFACTURE OF TEXTILES

	2008	2009	2010	AVERAGE YEARLY EVOLUTION
Austria	4256	3790	3822	-5,10%
Belgium	268	292		
Bulgaria	18371	16441	17671	-1,91%
Cyprus	172	139	124	-13,95%
Czech Rep,	7145	5949	6827	-2,23%
Denmark	33		311	
Estonia	1573	1332	1234	-10,78%
Finland	1967	1954		
France	25593	25294		
Germany	17815	16187	20718	8,15%
Greece	5601	3133		
Hungary	13192	11869	10491	-10,24%
Ireland	163	141		
Italy	128499	119316	140775	4,78%
Latvia	470	366	343	-13,51%
Lithuania	1423	1110	1084	-11,91%
Malta		57		
Netherlands	1849	1767	1951	2,76%
Poland	25793	26766	26486	1,34%
Portugal	44969	43768	43114	-2,06%
Romania	72709	59679	57840	-10,23%
Slovakia	12119	10750	10027	-8,63%
Slovenia	4313	3695	3468	-9,80%
Spain	39768	33223	34958	-6,05%
Sweden	1116	882	723	-17,61%
United Kingdom	6727	7400		
TOTAL	**435904**	**395300**	**381967**	

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*

European Skills Council
Textile Clothing Leather

Report #2

Good Practices Bringing Education and Work Together
to Reduce Persistent Skills Mismatch at Sector Level.

Mechanisms at National or Regional Level, between
Anticipation Bodies and Education & Training Providers

This report has been elaborated
with the support of the European Commission

0. SUMMARY
Table of contents

Executive Summary

The European Skills Council: Textiles Clothing Leather (EU-TCL) exists to address skills, training and human resource related activities on a European level. By forming strong partnerships between industry and skills partnerships (ISPs) and leading on the skills agenda, the opportunity exists for the EU-TCL to carry out its mission, seizing the initiative to equip the textiles, clothing and leather industries with the knowledge and skills required to ensure businesses in the sector can compete and prosper.

Based on the feedback of the participating national ISPs, seven common areas of collaboration have been identified where optimum working practices undertaken at a national level have achieved impact in reducing skills mismatches. These seven areas are within the domains of governance, research, partnership, development, careers information advice and guidance, policy, marketing and communications. All seven areas have intricate and dynamic interdependencies with each other: the whole is greater than the sum of the parts. These dynamic interrelationships between practice in different areas has a multiplier effect on how individual ISPs are able to develop optimum practice and achieve impact in reducing persistent mis-matches.

This report identifies the successful initiatives undertaken by the national ISPs within the EU-TCL, bringing together employers and training providers to reduce skills mismatches. Whilst each ISP operates to a different remit and is resourced to deliver different initiatives, it highlights that successful activities conducted on a national basis rely on accountability to, buy-in from and interaction with not only employers and training providers, but also a wider range of additional social partners to ensure they have positive impact on the industries they represent. Throughout the report, a number of optimum practice case studies have been identified, reflecting working practices and initiatives that favourably impact on skills mis-matches by bring employers and the education/training supply side together.

Importantly, the findings within this report give insight into a blue print for creating an ISP and guide the EU-TCL on how it can offer leadership to the sector by adapting and extending many of the measures undertaken on a national basis. This will ensure EU-TCL activities have a multiplier effect on the sector it represents, reducing skills mismatches Europe-wide and therefore ensuring European TCL industries are competitive in an ever changing global environment.

Glossary

BFC	British Fashion Council
CQP	Certificat de Qualification Professionnelle
CQPI	Certificat de Qualification Professionnelle Interbranche
DISC	Design, Manufacture and Innovation Centre
DCMS	Department for Culture, Media and Sport
ESCO	European Skills, Competences and Occupations
ESF	European Social Fund
EU-TCL	European Union Sector Skills Council: Textiles, Clothing and Leather
FE	Further Education
FEMCA CISL	Federazione Energia Moda Chimica Affini
FLICTEM CGIL	Federazione Italiana Lavoratori Chimica Tessile Energia Manifatture
HE	Higher Education
IAG	Information, Advice and Guidance
ISOP	Industry and Skills Partnership
OFM	Occupational Function Map
ONC	Osservatorio Nazionale Concia
NOS	National Occupational Standards
STAG	Scottish Textiles Academic Group
STIA	Scottish Textiles Industry Association
TCL	Textiles, Clothing and Leather
UILCEM UIL	Unione Italiana Lavoratori della Chimica,Energia e Manifatturiero
UKCES	UK Commission for Employment and Skills
UKFT	United Kingdom Fashion and Textiles Association
UNIC	Unione Nazionale Industria Conciaria
VDAB	Vlaamse Dienst voor Beroepsopleiding en Arbeidsbemiddeling

1. INTRODUCTION TO THE EUROPEAN SECTOR SKILLS COUNCIL FOR EDUCATION AND EMPLOYMENT IN TEXTILES, CLOTHING AND LEATHER

The EU-TCL Skills Council aims at improving the level of education, skills and employment in the Textile, Clothing and Leather Sector addressing amongst other 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 corporate executives, owner-operators or smaller firms, employees, union leaders, educators, bi-partite organisations dealing with education and skills development, and interested government representatives, our EU-TCL Skills Council aims to address 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 mission of the EU-TCL Skills Council is:

- To monitor labour market developments in the Textile, Clothing and Leather industries and contribute to the active networking/information exchange of the involved sectoral national observatories/and or the respective social partners at European level regarding Education Training and Employment of the Textile Clothing and Leather (hereafter called TCL) Industries;
- To carry out reports/surveys/analyses to construct and maintain the interaction with the reference market related to Education Training and Employment of the TCL Industries;
- To foster alliances within the TCL Industries and also with related sectors (e.g. machinery manufacturers, chemical industry, distribution, etc.) 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 TCL industries;
- To provide the members with relevant information in Education Training and Employment of the TCL Industries in order to facilitate decision-making;
- And to carry out all activities which may generally contribute to the achievement of the objectives of a supranational nature set out in the paragraphs above.

The group is convened by the European Social partners of industriAll, **EURATEX** and **COTANCE**, with the financial support of the European Commission- Directorate General for Employment and Social Affairs.
National Industry Skills Partnerships that are to date currently involved in the EU-TCL Skills Council observatory are:
Centrum voor Opleiding, Bij- en Omscholing voor de Textiel - en Breigoednijverheid (**COBOT**), Belgium *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 all social partners who approve strategic matters and specific projects. Cobot is the industrys first partner in training, education and guidance.
www.cobot.be

Creative Skillset, United Kingdom Creative Skillset is the UKs 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 UKs 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.
www.creativeskillset.org

Instituut voor Vorming en Onderzoek in de Confectie / Institut pour le Recherche et lEnseignement dans la Confection (**IVOC/IREC**) Belgium *Institute for Research and Training in Dressmaking.* IVOC is an non-profit association, created in 1987 by employers and unions and supports training actions in the ready-made clothing & upholstery and textile care sectors in Belgium. IVOC is managed by social partners with IVOCs activities and services funded by the companies within the sector. 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).
www.ivoc.be

OPCALIA France - D partement Textiles - Mode Cuirs Textiles, *Fashion and Leather Division* - Opcalia supports companies to optimise the funds that they use in the training of their employees. To ensure the skills development of companies and employees, Opcalia provides a complete local quality service of advice, information and support to develop training plans and funding. Opcalia has several regional offices that enable a reactive and bespoke delivery to companies. Opcalia is one of 48 similar organisations in France, representing 110 000 firms and their 300 0000 employees within 29 professional sectors including amongst them Textiles, Fashion and Leather.
www.opcalia.com

Osservatorio Nazionale Concia (**ONC**) Italy - ONC is the bi-partite national tanning observatory for employment and training representing employers and trade unions within the Italian Tanneries sector. It was created on March 16th 2012, and consists of its founding members of National Tannery Association UNIC and the Trade Unions FILCTEM CGIL, FEMCA CISL and UILCEM UIL. At a national level, the ONC aims at analysing and assessing sectoral issues and proposing initiatives in the areas of Environment and Safety, Education and Training, Labour Market and Social Responsibility.

Further information on each of these national Industry Skills Partnership bodies, their remit and activities can also be found via the European Skills Council Textiles, Clothing, Leather website: http://europeanskillscouncil.t-c-l.eu

THE SUITE OF REPORTS

This research report is the second of a suite of four authored by ISPs in the EU-TCL. These reports are based on sector relevant issues regarding skills and jobs in Europes labour market. The full suite is as follows:

1. The evolution of the supply, employment and skills needs including foresight and forecast analyses for the sector
2. Good practices bringing education and work closer to reduce persistent skills mismatch at sector level. Mechanisms, at national or regional level, between anticipation bodies and education & training providers.
3. Innovative tools, national and/or regional strategies, local initiatives, methods put in place for peer learning purposes
4. A report regrouping the recommendations of the European Sector Council on the basis of discussions and information exchanged.

2.INTRODUCTION TO THE RESEARCH REPORT

Understanding mechanisms and good practices that reduce skills mismatch at a sectoral level is crucial in ensuring the TCL industries have the correct people and skills at their disposal, ensuring both business growth and job creation for employers within the sector.

Ensuring a synthesis between the demand (employers) and supply (education and training providers) to tackle issues concerning training and skills mismatches is central to this. Understanding what optimum practice looks like and the measures that can be successfully adopted within the EU-TCL are central to ensuring the EU-TCL is able to fulfill its mission.

Defining optimum practice

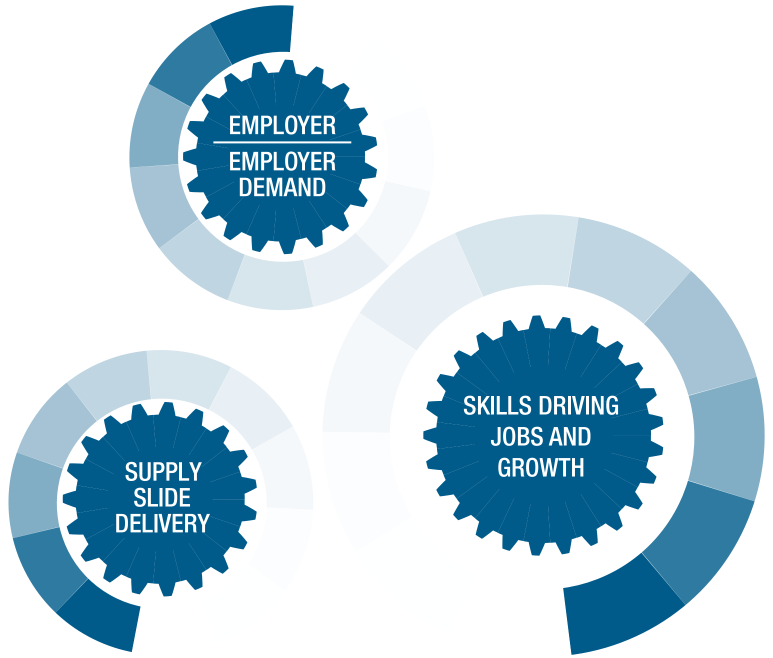
This report attempts to identify optimum working practices within ISPs and measures that the EU-TCL may undertake to have a multiplier effect of skills and training.
Optimum practice differs from best practice in that there is an attempt to recognise that each ISP has a different mandate and is resourced differently to deliver their particular products and services.
Therefore using this terminology and suggesting recommendations without being prescriptive on the intensity of these allows each ISP to work within both the remit they cover and the levels of resource they command.

At an employer level, ensuring TCL businesses have access to the right skills is crucial on a number of levels, especially given the sector is dominated by SME and micro-employers with limited resources. Issues concerning skills mismatches that impact on employers within the sector can include, for example, sectoral and business performance, recruitment and retention, and impacts on innovation. Having access to recruits with the required skills is therefore an enabler to ensuring businesses can be competitive and thrive.

Whilst understanding demand drivers and the needs of industry and individuals form an important part of the picture, understanding supply side delivery mechanisms and how these networks interact with these demand side drivers to deliver the solutions required.
Examples of why supply-side interaction with demand actors is crucial include ensuring that:

- training providers have awareness of employer demand, the circumstances they work and knowledge of the industries and their issues.
- provision is tailored to employers requirements (what, how, when)
- the training is of high quality and is fit for purpose.

Figure 1: A model of demand and supply synthesis



This paper therefore reports on the measures undertaken by the ISPs within the EU-TCL to bring together employment and education/ training provision to work best for the TCL industries.

As well as acting as an optimum practice guide for individual ISPs, highlighting new approaches or means to build on existing initiatives, the report offers guidance and a vision on how the EU-TCL can most effectively work for the TCL sectors to have a trans-national impact on ISP sector activities and amplify the effectiveness of initiatives undertaken at a national level.
This undertaking is further of benefit to the sector, given the TCL industries are dominated by SMEs and micro-employers with limited resources to access the people and skills they require to compete and flourish.

3. METHODOLOGY

This report is based on the optimum practice activities undertaken at a national level by the ISPs currently represented within the EU-TCL. Initially, each of the individual partners submitted evidence of their activities to Creative Skillset on an informal basis.
From this feedback, the identification of optimum practices being undertaken by ISPs was collated. Seven key areas of optimum practice in bringing together employers and education/training providers were identified and formed the basis of on-going enquiry.
They are illustrated in Figure 2.

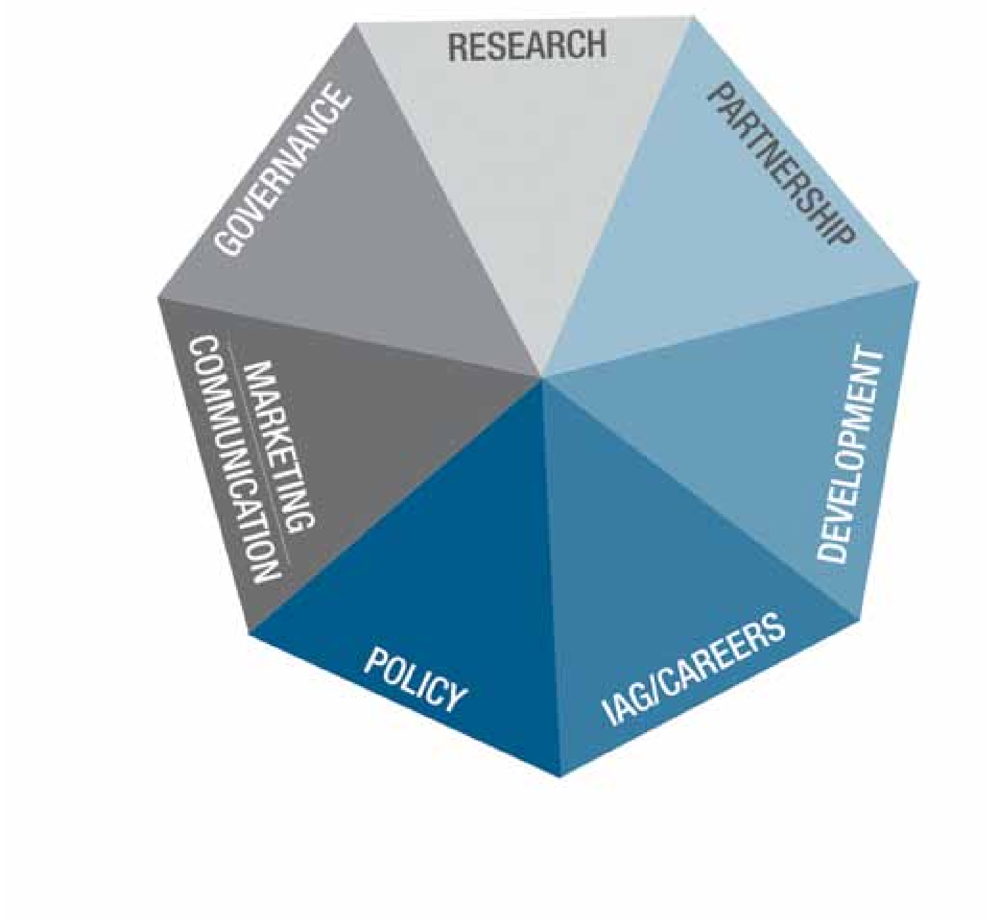


Figure 2: Model of seven key areas of best practice

Following the identification of these key best practice areas, a questionnaire was sent to partners to ensure all activities were correctly represented and to fill in any gaps in the reporting. This enabled Creative Skillset to understand, at a national partner level, why initiatives were undertaken, how they were designed and delivered, the outputs, outcomes and importantly the impact achieved by these. Findings were fed back to partners for comment before an analysis and synthesis of findings was undertaken.

From these, the report is able to give insights into potential areas of optimum practice.
Each of the seven areas identified includes recommendations at the end of each chapter based on:

- how ISPs can potentially adopt optimum practice measures into their operations,
- how the EU-TCL can help to facilitate these practices,
- how commercial activities can be potentially derived from these activities, and
- how activities undertaken by the partner ISPs can be adopted by the EU-TCL to achieve a multiplier effect and lead on activity

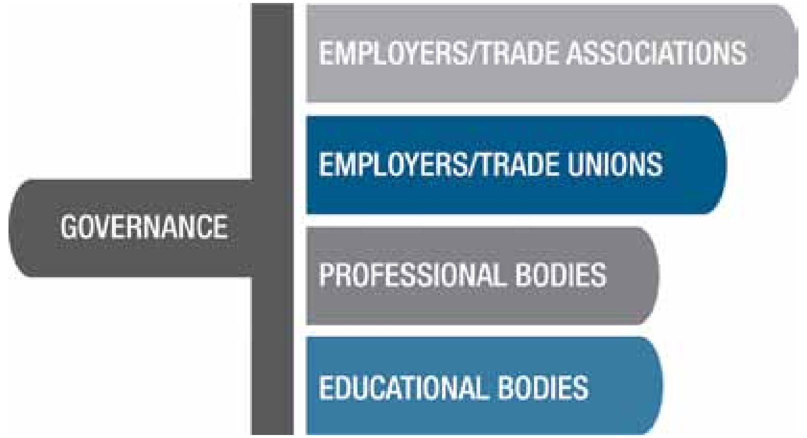
4. THE SEVEN AREAS OF BEST PRACTICE

4.1. Governance

Governance refers to how organisations decide to undertake activities, and to whom they are accountable. Good governance ensures activities are undertaken and co-ordinated in a manner that allows for authoritative strategic direction and accountability for projects undertaken and completed.

Each of the partners has in place governance arrangements that put their social partners at the heart of their operations. Whilst individual ISPs mandate and resources differs, having such governance mechanisms in place allows all activities undertaken to be developed by industry, for industry, and whose ownership of the process gives these activities strategic direction and validity.

Figure 3: Model of Governance



OPCALIA's working priorities are established by the seven branches into which their organisational activities are divided. Formed of social partners including employers, professional bodies and national education stakeholders, these branches meet once every two months as a joint committee to establish working priorities, decide on the rules of procedure to finance companies training plans and validate the work carried out by the Studies and Development department.

IVOC's decisions are undertaken by social partners, formed of employer and employee representatives who come together in a forum to discuss **IVOC's** strategic and operational direction. Additionally, third party stakeholders such as schools and partner organisations have an advisory role although these mechanisms remain informal.

Operations are guided by **IVOC's** quality management system with ten basic criteria that each activity must encompass.

This ensures **IVOC's** measures serve the purpose of supporting both employers and employees ambition and develop consensus amongst them.

Likewise, **COBOT's** governance is led by a board of directors meeting ten times a year, which comprises of social partners such as employer organisations, Fedustria and three trade unions. The boards remit including developing and approving strategy, operations and feeding back on specific projects.

ONC's governance arrangements are bipartite in nature and includes employer (through the National Tannery Association **UNIC**) and employee (with the trade unions **FILTCEM CGIL**, **FEMCA CISL** and **UILCEM UIL**) representation.

ONC's remit as an observatory is to analyse and assess sectoral issues and propose initiatives around the four areas of environment and safety, education and training, labour market and social responsibility. The policies and actions of the **ONC** are decided by its Assembly, which meets every four months which decide on actions to be taken and policies to be implemented.

Creative Skillset's governance arrangements differ slightly from these above models. Whilst **Creative Skillset** works with a wide range of social partners, governance and strategic direction is employer led. The **Creative Skillset** Board of Directors is made up of leading industry figures who guide every aspect of **Creative Skillset's** work[1]. The Board meets four times a year with its role is to provide overall direction and leadership for Creative Skillsets corporate strategy and ensure its effectiveness as a business and a Sector Skills Council.

At present, the fashion designer Betty Jackson CBE is the Fashion and Textiles representative on this board. Currently there are twelve requirements for the board catalogued in the Terms of Reference.

The structure of **Creative Skillset** also includes advisory groups below the Board of Directors. 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[2]. Furthermore, due to the UK-wide coverage of Creative Skillsets operations, arrangements are also in place within the devolved administrations. These include the Scottish Textiles Strategy Group and the recently initiated Welsh Fashion and Textiles Forum.

Impact of these Governance measures

Each of the observatories reported that the governance measures they have in place allows them to be strategically guided by the employers, social partners and industry groups they represent and work on behalf of. This ensures strategies, products and services are consistent with their requirements and offer an effective mechanism for development and feedback. Additionally, these governance arrangements ensure products and services are authoritative, encouraging and galvanising employer, training provider and sectoral and social partner buy-in, whilst also influencing wider governance stakeholders and institutions to their effectiveness and need.

1 http://www.creativeskillset.org/creativeskillset/governance/
2 http://www.creativeskillset.org/fashion_and_textiles/about_our_work/article_7748_1.asp

Governance recommendations

How ISPs can adopt optimum practice measures:

- *To ensure ISP activities are authoritative and relevant to the industries they represent, employer and relevant social partner influence and leadership must be sought.*

How the EU-TCL can assist on a national level:

- *Using the knowledge and governance structures of its members, the EU-TCL can adopt an advisory position to act as a conduit for peer review for ISPs as required.*
- *That the EU-TCL takes the lead at an EU level as the reference point for skills for the ISPs it represents*

Commercial activities that can be undertaken by the EU-TCL:

- *The existing members of the EU-TCL have powerful employer and social partner governance arrangements. These give the EU-TCL an authoritative position in which activities can be developed and voices heard at EU level to leverage project activity and funding.*

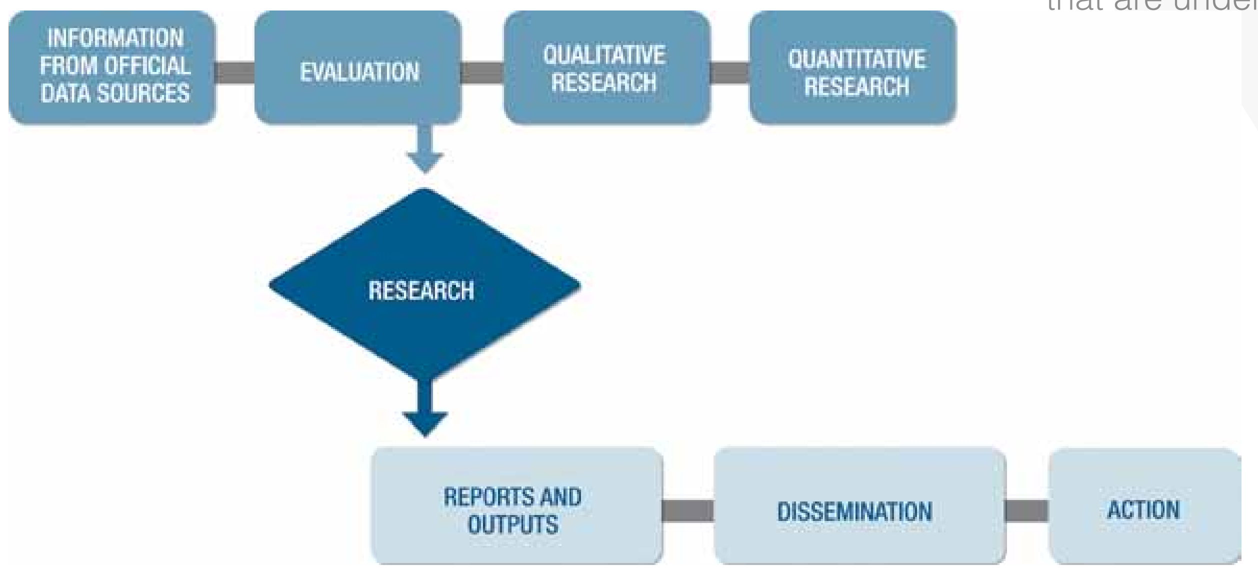
4.2. Research

This paper therefore reports on the measures undertaken by the ISPs within the EU-TCL to bring together employment and education/training provision to work best for the TCL industries.

As well as acting as an optimum practice guide for individual ISPs, highlighting new approaches or means to build on existing initiatives, the report offers guidance and a vision on how the EU-TCL can most effectively work for the TCL sectors to have a trans-national impact on ISP sector activities and amplify the effectiveness of initiatives undertaken at a national level. This undertaking is further of benefit to the sector, given the TCL industries are dominated by SMEs and micro-employers with limited resources to access the people and skills they require to compete and flourish.

Each of the participating observatories bases their decision making on research. Whilst each of the partners is resourced differently for this activity, responses from each of the partners indicate there are a number of common important activities that are undertaken.

Figure 4: Research activities



IVOC, ONC and Creative Skillset undertake research that involves understanding and monitoring sector developments from **official government statistics. Creative Skillset** undertakes analysis of the Fashion and Textiles sector based on a number of official sources such as the Office of National Statistics and Nomis to monitor sector demographic patterns and trends, as well as economic, employment and business indicators. Information from funding bodies also allows **Creative Skillset** to monitor supply and take-up of provision to track performance of products and services. The materials used by **IVOC** come from both Belgian federal sources http://www.ccecrb.fgov.be and regional bodies http://www.werk.be whilst the **ONC** through **UNIC** collect official statistical and economic information annually.

Quantitative research allows national partners to quantify information collected from employers, the training supply and other social partners and ensures the evidence exists for understanding the sectors needs and the development of products and services based on this. **IVOC** collects information from their service users that accompanies the training they undertake (which totals roughly 130 enterprises and accounts for around 2,500 trained workers) to build up a profile of the company and an understanding of the competency requirements each individual company has. Additionally, **IVOC** organises a biennial survey directed to all companies within their remit. The main purpose of this survey is to assess the competency requirements of employers and informs development activity. For instance, 2011s survey emphasis was on the wholesale sector and its needs.

Similarly, **Creative Skillset** both receives and conducts quantitative research. Firstly, on a biennial basis, information is received from the UKCES in the form of the UK Employer Skills Survey (formerly the National Employer Skills Survey and the respective skills surveys from the home nations), a nationwide survey of around 80,000 employers within all sectors of the economy with the 2009 survey giving information for 1,850 employers within the fashion and textiles sector and covering a wide range of employment, skills and training indicators. Additionally, an in-house survey was undertaken in 2008 of fashion and textiles employers within the sector which had a sample size of 2,059 responses providing information on specific occupational skills needs and educational priorities.

COBOT's quantitative research includes conducting short surveys and also by analysing company training plans to indicate what kinds of measures and support is required. **ONC** also collect information in the form of surveys and specific evidence from tanneries within their remit to understand need. These surveys are ad hoc in their timings to allow **ONC** to ask questions and gather information of immediate industry concern.

Each of the partners utilises information gained from discussions and consultations with their members as a building block for engagement. Conducting **qualitative research** allows rich evidence and information to be collected enabling skills requirements to be understood in detail. **COBOT** utilises formal conversations with senior decision makers within employers and their close company relationships to understand training needs. **Creative Skillset** uses its contacts with employers, trade bodies, sub-sector forums and various committees as conduits to regularly collect information that aid Creative Skillsets work with the sector and feed into both research activity and reporting as well as directly into qualification development. **Creative Skillset** is also in the process of bringing together workforce and employer research panels to give information on topics of interest, allowing views to be gathered rapidly to inform **Creative Skillet's** activity.

OPCALIA's qualitative outputs include the results of their observatory led job studies. These consist of interviewing employers, social partners, training providers and students by way of surveys or interviews to understand the skills required to undertake jobs in the sector. This ensures **OPCALIA** is able to make informed decisions on whether the development of training courses are required, and ensures existing training is up to date and meet employer and employee requirements. Furthermore, the analysis of this information is conducted by working groups that are composed by employers, professional branches and national education representatives, enabling the findings to be directly interpreted by industry. Several surveys of this nature were conducted in 2011 including a study regarding textile vocational certification and surveys into the skills required for textile finishing and production management in textiles and clothing.

Another key aspect of research is **evaluation of products and services**. Each of the observatories evaluates their initiatives and skills solutions for impact and lessons learnt, enabling confidence in the approaches undertaken. **COBOT** collects information from training that is undertaken to understand how successful the training was and potential changes that need to be made. An example of the impact of **COBOT's** evaluation of training is their survey of 611 employees and trainees who undertook training through COBOT in 2011 where tailored feedback on course content and training delivery methods were sought. The results of this evaluation have informed the future content and delivery of training programmes, which are openly discussed with involved social partners in order to monitor and inform the sectoral training policy and the training offer.

Creative Skillset too has a dedicated evaluation function, ensuring the impact of products and services are measured. All of Creative Skillsets project based work is required to be evaluated so that impacts can be fed back to funders and partners whilst also ensuring lessons are learnt for future activities. An example of this function is the evaluation of a Fashion and Textiles Apprenticeship pilot in London from which the measuring of resource, the impact achieved and lessons learnt from this initiative has informed future development.

Given the differences in the ways each of the observatories is funded and goes about its operational tasks, there is a difference in **information each publishes. COBOT** in 2010 published a report entitled Toekomstige competentievereisten in de Vlaamse textielindustrie, Antwerpen (Future competence requirements in the Flemish Textile industry), examining what competences were required by the Flemish textile industry now and predicted to be required within a five to ten year period. The report identified nine textile functions of interest and the required competences for each of these areas. Identifying these skills needs has guided **COBOT's** actions in skills development.

Creative Skillset's research outputs include the Sector Skills Assessments for the UK and each of the Home Nations (England, Scotland, Wales and Northern Ireland) that report on the Drivers of Skills Demand, Skills Needs, Skills Supply and Anticipating What Lies Ahead for the Fashion and Textiles sector. This has enabled the SSC to identify the key priorities for action within the area and work closely with employers on the development of products and services to benefit the sector [3]. Other research outputs include sub-sector and regional factsheets, an analysis of the National Employer Skills Survey 2009, Fashion and Textiles economic bulletins, clothing/fashion design report in Higher Education as well as contributing to various ad hoc research requests. Current and on-going activity being undertaken includes the completion of a future-forecasting project, looking at sector demand for employment and skills between now and 2020 and a mapping of the supply side to understand the courses available and demographics of learners on Fashion and Textiles courses at HE and FE level. **IVOC** benefits from studies undertaken by the Central Economic Council (http://www.ccecrb.fgov.be), which creates specific socio-economic studies for the sector. These reports on various sectors of the economy, set out the views, opinions or proposals concerning issues relating to the national economy and are an important source of sectoral intelligence helping to shape skills initiatives.

3 http://www.creativeskillset.org/research/activity/ssa/article_8222_1.asp

Research recommendations:

How ISPs can adopt optimum practice measures:

- *Opportunities exist to understand employer need and requirements through ISPs various interactions with social partners. This can range from formal surveying to informal conversations which can help inform ISPs work.*
- *Information concerning the TCL sector can be readily obtained from national statistical agencies, ensuring contextual, quantitative data is available to ISPs.*
- *ISPs can ensure contacts are engaged with the research process through everyday engagement. This can range from evaluation of products and services used, to utilising surveying opportunities.*

How the EU-TCL can assist on a national level:

- *The EU-TCL can be a central point for research collation undertaken at a national level.*
- *The EU-TCL can gather data available via agencies such as Eurostat on the TCL sector to ensure information is available for each nation and at an EU level to inform sector knowledge.*

Commercial activities that can be undertaken by the EU-TCL:

- *The EU-TCL could look at commercialising outputs it could produce from organisations such as Eurostat.*
- *Opportunities exist through the network of ISPs involved in the EU-TCL to conduct pan-national quantitative or qualitative research, including comparative research. Utilising these can be powerful in attracting funding opportunities and/or providing research on a commercial basis, including attracting inward investment.*

Impact

Each of the observatories can point to interactions with their sector in helping them to understand employer and employee need, the context of these requirements and how these can be used in dialogue with the supply-side, ensuring the design and develop of products, services and skills solutions that are fit for purpose. Whilst there are differing levels of resource available to each ISP, research ensures an informed allocation of ISP resources to overcoming skills mismatches.

4.3. Partnership

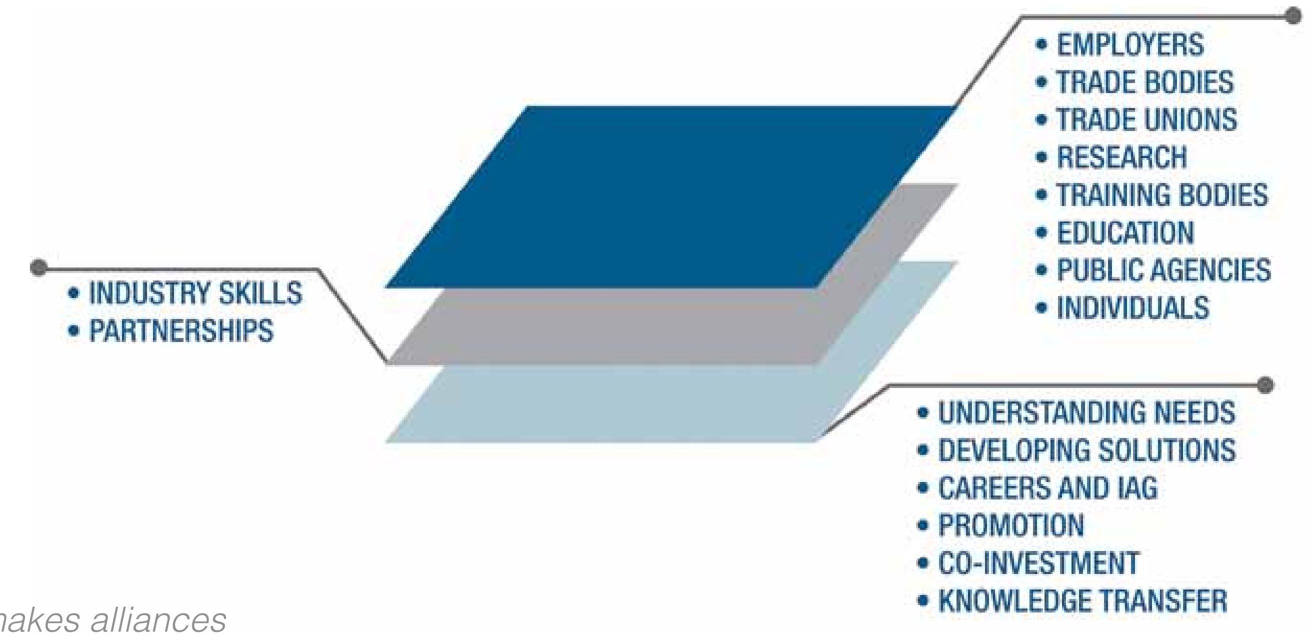


Figure 5: Partnership working arrangements

Partnership covers how an organisation makes alliances and engages employers, employees, individuals, training providers, trade unions and policy stakeholders around initiatives and skills solutions, including research, development etc. Effective partnership work is critical to ensuring these groups are engaged with the organisation's vision and ultimately buy in to solutions How an ISP is able to form these partnerships has a direct bearing on their ability to be catalysts for combatting skills mis-matches.

As already recognised, each ISP has governance measuresin place that incorporate sector employers and in some cases training providers and wider social partners, which form a basis or partnership working and industry engagement. Central to each ISP's activities is their engagement with employers, employees, individuals, training providers, trade unions, policy stakeholders and other social partners such as professional bodies, forming the basis of dialogue and facilitate working arrangements around skills solutions.

IVOC's formal engagement with individual **employers** is on the whole based around those who are the recipients of **IVOC's** guidance and financial support programmes. These employers are required to develop training plans to enable them to access **IVOC's** support. **IVOC** also works closely with employers in-house experts and trainers ensuring training interventions are appropriate and that knowledge share is facilitated. Likewise, **OPCALIA** works with a number of employers within the development of its tools and in many cases are used to pilot them before wider release. Being an employer led body **Creative Skillset's** work revolves around employers and enabling them to forming partnerships, both with themselves and crossing through education, training provision and many others. **Creative Skillset** convenes the Fashion and Textiles Council, and also four separate sub-sectoral forums. These forums are attended by employers, training providers and other social partners where skills issues and solutions are discussed, new initiatives conveyed, plans for implementation are agreed and a forum for engagement. Other specific partnership activities Creative Skillset is involved in include the Scottish Textiles Industry Association, Fashion Alliance and the Creative Industries Council.

OPCALIA engages with **employee representatives** by working closely with trade unions who are involved at different steps in the development of tools from their creation, validation and deployment. In many cases, these links and ability to engage fully with employees form the source of much of their tool developments. **ONC** with trade union representation within their Assembly also ensure employee requirements influence their activities.

Forming links with **training providers** is a key activity of the partners. Whilst many initiatives are designed to facilitate employer and employee skills development, working to improve and promote the provision delivered by the supply side is a key activity to ensuring the success of skills solutions. **COBOT** has partnerships with all of the textile schools and public training centres to update and share learning infrastructure and operational knowledge. This allows **COBOT** to engage textiles teachers to deliver school based activities and training whilst also ensuring that the content of learning content for training programmes is kept up to date. All of **COBOT's** own courses and training materials are developed in collaboration with trainers, both external from providers and **COBOT's** own in-house trainers.

IVOC forms links with a number of experts and trainers in order to deliver their training programmes. The result is a six-month training calendar on various items, technical, commercial and communication (http://www.ivoc.be). Whilst many of **IVOC's** dealing are on a working group and governance basis in terms of forum activity, they have a forum called Mode Creatief Onderwijs (http://www.modeonderwijs.be) which exists to facilitate communication with Fashion schools. **ONC** have similar arrangements in place with providers as and when a project requires this, enabling them to offer each other peer review and best practice ideas.
Many of **OPCALIA's** skills solutions and developments are delivered to employers through partnership with specialist training providers who also help to develop **OPCALIA's** tools and studies. An example is through the delivery of Professional Certificates where **OPCALIA** trains the training providers in their methodology before they go out to companies. Similarly, **Creative Skillset** facilitates a Fashion and Textiles lead provider network. This group brings together training providers of **Creative Skillset** fashion and textiles courses, providing a forum to discuss new developments, communicating implementation of the latest **Creative Skillset** products and services. Likewise, **Creative Skillset** has links with the Design, Manufacture and Innovation Centre (DISC) which is a key partnership.
There are also links with institutions such as the Textile Centre of Excellence, The Textile Institute and the North West TexNet, all of which are organisations that have members, offer support and training functions and participate or provide academic research into the sector. These relationships offer both partnerships for delivery but also enable key partners to be kept abreast of industry developments.

Understanding the latest advancements and what implications they have is enabled through partnership with **research institutes**.
COBOT nurtures relationships with textile research centres to ensure technical and scientific evolutions within the industry are understood and how these can feed into the development of their products and services. **IVOC** works closely with a number of experts and consultants within the development of their training frameworks, meaning **IVOC** is able to offer added value through initiatives such as professionalising human resource management within the industry.
ONC maintains good relationships with the PO.TE.CO, a limited consortium in Tuscany offering education, research and technology transfers in the Tannery sector. PO.TE.CO maintains close ties with the University of Pisa to gain insight into leather, chemistry and technology through the Degree of Industrial Chemistry and also has ties with a local technical institute for Chemistry, enabling discussion on the chemistry of tanning processes used during theoretical lessons at the institute and those used in laboratory work at the technology park itself, using the innovative machinery and expertise of on-site personnel. Furthermore, recent reforms within educational policy have made **ONC** partner business representatives and companies part of special committees in technical institutes.
These committees aim to strengthen relationships with schools referral bodies, establish strong links with the socio-economic milieu and bridge the gap between educational goal of schools and the educational and vocational needs of the business world.

COBOT has forged links with **other skills and training institutions**, such as sectoral training centres (for example similar institutions that cover the clothing, metal, food, wood and furniture sectors) on both a formal and informal basis. These partnerships allow **COBOT** to run joint courses for employees from different sectors; deliver ESF projects; exchange good practice and benchmark performance. **IVOC's** work with other organisations such as **COBOT** allows them to reach employers for whom training would not normally be feasible with successful outcomes. Similarly, **IVOC** has partnerships in place with other sectoral training centres and has an agreement in place with CEVORA (http://www.cevora.be), the training institute for white collar-sectors within the framework of their joint training programmes and allows **IVOC** to work on concepts such as training for temporary workers (http://www.vfu.be)

One of **Creative Skillset's** biggest impacts in the field of partnerships has been **to bring together employers who are often in competition to collaborate in training** enabling them to overcome skills issues and supply new talent into the sector. An example of this is the Savile Row Bespoke Training model supplying new talent to businesses based in the London street synonymous with high quality tailoring. Recognising they had a highly skilled yet ageing workforce close to retirement, and requiring a new generation of skilled tailors to replace them, the Savile Row Bespoke Association member companies came together to supply a new generation of tailors.
In partnership with Creative Skillset and a local college, a training programme was developed that met the requirements of the participating tailors. This successful programme now boasts over 400 individuals who have now gone through the pre-Apprenticeship programme, with around 15 per cent having now found employment within the one of the participating companies, ensuring the skills are continued.
Another example is that of the luxury leather bag maker Mulberry. Mulberry recognised that they needed to invest in skills as they were losing an experienced skilled workforce to retirement without suitable new candidates coming through. With the support of **Creative Skillset**, Mulberry formed a partnership with a local training provider Bridgwater College, developed standards an apprenticeship programme that suited their business needs and through this innovative partnership have now had 70 new recruits go through the programme.
In December 2012, Creative Skillset heard that it was successful in its bid to expand its network of employers to implement a Group Training Scheme model, with the ambition of pooling together employers to enable them to access training solutions relevant to their businesses.

Partnership Best Practice Case Study Scottish Borders Knitwear Association (Creative Skillset)

A group of 12 traditional rivals in Scottish knitwear manufacture formed an unlikely alliance to save their industry from extinction. A skilled but ageing workforce coupled with a poor perception and lack of able new recruits amongst the local population had seen crippling skills shortages occurring, a situation exacerbated by the lack of training initiatives and opportunities in the Borders area.

Led by the House of Cheviot and the Scottish Borders Exporters Association, the knitwear manufacturers banded together and, with the help of Creative Skillset and a collection of educational, trade and governmental bodies, developed an innovative solution to their collective challenge. The result has been the Creative Skillset Modern Apprenticeship programme that has been driven by the industry to respond to the very specific challenges that it faces. Creative Skillset joined the project in its early stages, designing the apprenticeship and bringing together the many organisations who will support the project technically and financially, and help sustain it in the future.

Job Centre Plus provide potential recruits through the Get Ready for Work and Work Experience initiatives, Scottish Enterprise organisational support and Skills Development Scotland provide financial support of up to £4,500 per apprentice. The Scottish Textiles Academic Group (STAG) and Carndonald College then provide academic support for the trainers, assessors and apprentices, and there is broad support from the Scottish Textiles Industry Association (STIA) and the Scottish Government.

Currently, there is a cohort of 65-75 candidates going through the programme with a further 25 people nationally qualified as trainers along with an additional 15 assessors. The manufacturers having now formed the Scottish Borders Knitwear Group Training Association will now run the apprenticeships in the future. The success of this programme has meant STIA is hoping this programme will form the template for other branches of the fashion and textiles industry throughout Scotland, and indeed for any industry facing similar challenges.

Impact

Being able to facilitate effective partnerships with social partners is a vital part of the dialogue process, understanding need, and developing ideas for skills delivery and capacity building.
Each ISP is able to use these partnerships as a basis for developing individual engagement and also to bring together groups in the interests of skills development and mutual benefit. As the examples across the ISPs demonstrate, partnership working across a number of social partners and stakeholders can result in innovative ways of developing activities and skills solutions that bring a range of benefits to all involved within the process.

Partnership recommendations:

How ISPs can adopt optimum practice measures:
- *ISPs are recommended to form an understanding of the actors within the skills agenda, who they are, what they do, level of influence and how they can assist with activities.*
- *To design forum activity that purposefully brings together partners and/or combinations of partners.*

How the EU-TCL can assist on a national level:
- *The EU-TCL can use member ISP knowledge to recommend partnership working within national frameworks.*
- *To use its sphere of influence to enable ISPs to access EU level partners.*

Commercial activities that can be undertaken by the EU-TCL:
- *Using ISP level partnerships can see pan-EU initiatives developed and undertaken*
- *Explore opportunities to bring together individual ISP partners expertise to ensure skills are available for commercial exploitation as and when the need requires*

4.4. Development

Developing skills solutions with employers, providers and other partners ensures products and services meet industry needs, ensure that they are fit for purpose and meet the expectations of the end user. to access the people and skills they require to compete and flourish.

n.b. Please note this section is fully expanded within research report three. Within this report, the concepts of the development work are understood within their context within best practice solutions.

Figure 6: Development initiatives undertaken

A key development identified by OPCALIA and Creative Skillset is ensuring employers and individuals are able to choose training that meets industry standards and is of high quality. OPCALIAs own quality assurance measure for training called Cursus labellis s. For training to meet Cursus labellis s standard, it has to be adjudged to be designed specifically for the needs of the TCL sector across all types of training (for instance, management and leadership training that is designed for TCL employers) and meet strict specifications defined by the social partners (length, content, pedagological methods.) Creative Skillset too runs a quality assurance scheme known as the Creative Skillset Tick . Creative Skillset accredits courses within the sector that reach a certain standard. For courses to earn Tick accreditation and carry the branding, they are subject to a rigorous assessment process undertaken by Creative Skillset. Currently within Fashion and Textiles, the Tick process is part of a pilot for fashion design courses in higher education and for Apprenticeship provision.

Development Best Practice Case Study: Validation of occupational achievement (OPCALIA)

A common theme within the TCL sector is that whilst the workforce is highly skilled, many within the workforce are without formal qualifications. This both hinders future employability and does not recognise their significant work achievements.

To overcome this, OPCALIA have developed their own system of validating professional achievement that recognise experienced workers within the TCL sector and the skills required to undertake the role without formal qualifications. In France, professional organisations and branches have been able to create professional qualification certificates for their workforces which are equivalent to diploma status. There aims of these awards are to validate a level of professional achievement and increase their employability; equip workers with the skills required for the certificate and allow companies to draw up their own individualised training schedule according to employee level. Workers are tested through producing a short resume of their experience, job shadowing, knowledge tests and a technical interview which allows an assessment to be made and an understanding of the skills acquired and the skills to be acquired. This therefore allows assessments for certification to be undertaken enables understanding of workforce training needs. Within the TCL sector, there are nine different CQP (branch qualification certificates) that have been developed which have seen 5,000 workers attain these within the six years of the scheme. There are also CQPI (Inter-branch Certificates) which are certificates which are of more generic nature and therefore apply to occupations across all sectors. To date, 3,300 have been awarded within the TCL sector.

Understanding skills needs within occupations is also major priority in ensuring training solutions meet the competency areas required by employers. Both **IVOC** and **COBOT** have developed of competency profiles in conjunction with the Flemish government, employers and other social partners that cover many of the job functions within their respective sectors http://www.synerjob.be. The validation of these competency profiles can only be done by the social partners to ensure their accuracy and relevancy. To further complement these profiles, **COBOT** has developed the Competextool, a tool to manage these competencies. In a similar vein, **ONC** have developed occupational achievement quality assurance validation processes as well as associated competency profiles. **OPCALIA** conduct research with a variety of social partners into the evolution of job competencies and the related skills. The impact of this work is that this knowledge has fed into current discussions with national education with a view to revamping the diploma programme for the TCL sector in France. **Creative Skillset** is responsible for the design and development of National Occupational Standards (NOS or Standards). These NOS describe **what a person needs** to do, know and understand in their job to carry out their role in a **consistent and competent** way. NOS are the building blocks of qualifications, informing the design of qualifications such as Apprenticeships[4]. Currently there are 11 suites of NOS across the Fashion and Textiles sector with new NOS for Technical Textiles currently being drafted. **Creative Skillset** also has a leading role in developing formal vocational training, working closely with employers, training providers and various stakeholders. The central product within Creative Skillsets vocational training offering is Apprenticeships which are available in fashion and textiles across a wide variety of pathways and at various levels of competence and experience[5].

Specific solutions have also been adopted by the ONC to overcome chronic shortfalls of skills young qualified engineers within the sector. ONC in partnership with the Ministry of Education, Universities and research have developed a course in higher technical education sector-specific technologies called Technology of Leather. The course implements proposals from the sector regarding knowledge and skills requirements teaches the basics of chemistry and the manufacture of leather, product and process innovations whilst also enhancing schools existing laboratory facilities. ONC also develop courses aimed at professionals (for instance managers, technicians, buyers, designers, managers and sales people etc) within a diverse number of areas where leather is used (for instance car interiors, furniture and clothing.) These courses encompass a wide variety of processes and techniques relevant to these occupations.

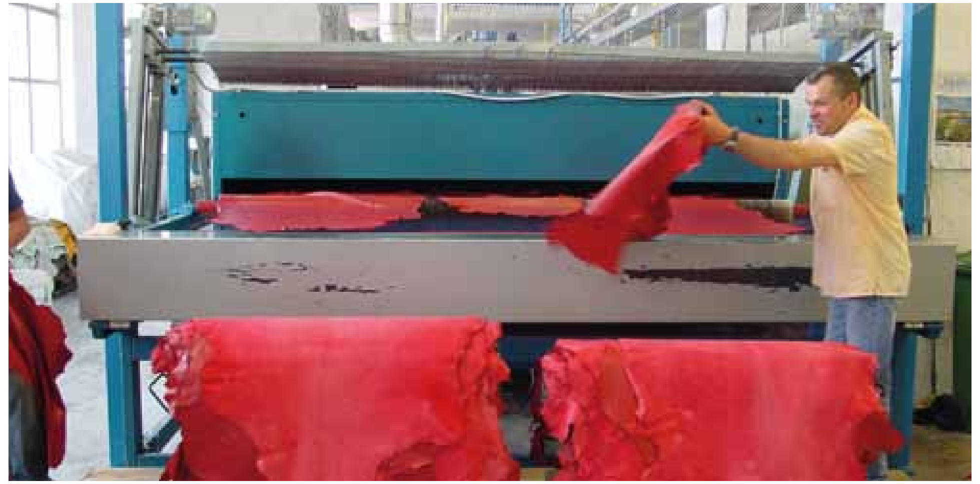
Since 2007, **IVOC** has contributed to the development of standards and tests for the professions of stitcher, ironer and pattern designers. On the basis of these standards, candidates who pass a test can be granted a certificate of experience (equivalent to an academic degree). These are developed with various external partners and experts (http://www.ervaringsbewijs.be). **IVOC** is also the developer, broker and provider of these services.

To combat issues with **illiteracy within the workforce**, an issue that is unspoken within the TCL industry yet which causes issues for both the employer and the individual, **OPCALIA** has developed the Compe´tences Cle´s en Situation Professionnelle (Key Competences needed in Professional Life) programme. This vocational training has been developed so **OPCALIA** member companies are able to identify their employees with numeracy and literacy needs without using the term illiteracy. **OPCALIA** is also resourced to visit individual companies, training providers and experts in illiteracy programmes to ensure the programme is being used, used correctly and refined to ensure its impact meets requirements.

The **development of learning tools and materials** is also something that the ISPs dedicate a lot of time to, working collaboratively. Overcome the issue of textile designers needing to improve their knowledge and employability, **COBOT** has developed a pioneering programme called i-Design. i-Design consists of a programme of demonstrations, workshops and exercises (encompassing eight modules, and 24 separate sessions) that is aimed at improving designers knowledge of subjects such as raw materials, yarns and weaving skills. Each separate module is led by an educational practitioner within the field being studied.
In partnership with the Centre for Fashion Enterprise, UKFT, British Fashion Council and **Creative Skillset** under the collective name of the Fashion Alliance, has developed two toolkits, one for high end designers and one for high end manufacturers to develop their commercial skills, something highlighted by the large number of business start-ups in these sectors but ones which also have a large early failure rate[6].

Ensuring companies are well resourced enough and have the skills internally to ensure the workforce is adequately trained and ensures companies do not have to pay for external training is also a key operation for two of the national partners. **IVOC** is prominent in the further training of teachers with a number of **IVOC** training programs available. The main topics covered by these training programs include; Styling & Fashion Trends; Textiles raw materials; Pattern drawing; and Ironing (http://www.modeonderwijs.be).
Creative Skillset has also developed train the trainer events with industry, which have been well attended encouraging knowledge sharing and ensuring companies have the skills and confidence to train in-house with up-to-date knowledge and techniques.
To facilitate the integration of young people in work-study programs, OPCALIA have produced the livret tuteur (mentor booklet) to help tutors welcome, assist, train, integrate and assess newcomers.

6 http://www.nesta.org.uk/areas_of_work/creative_economy/fashiontoolkit



Development recommendations:

How ISPs can adopt optimum practice measures:
- *By understanding the work of other ISPs and developing ideas which would work for them within resource.*

How the EU-TCL can assist on a national level:
- *Facilitating exchange of good practice in development and harmonisation of approaches between ISPs.*

Commercial activities that can be undertaken by the EU-TCL:
- *The EU-TCL has a number of specialist members and contacts that could assist with development of products and services required by a wider audience and to act as a broker for these services.*
- *To approach individual EU member states not within the EU-TCL to showcase ISP development work.*
- *Understand the wider funding routes available for development activities at a pan-Europe level and to exploit these for the sectors' benefit.*

Impact

The results of development work and the undertakings of the various TCL bodies has had the impact of ensuring products are developed that ultimately fit for purpose and improve the skills of the workforce, ensuring firm productivity. Again, ensuring employers and individuals are fully consulted, along with training providers and delivery partners during these consultations ensures these developments are optimised.

4.5. Information, Advice and Guidance (IAG)

Information, Advice and Guidance on careers, courses and funding within the industry enables individuals looking to begin a career within the industry (or further their existing career or even take a new career direction), to understand their options, job roles, and what training and skills are required. This issue is especially pertinent for the Textile, Clothing and Leather sector as many employers are faced with the issue of an ageing workforce nearing retirement. This combined and a negative image of the sector and the skills required by employers not being taught in school has led to skills shortages through-out the sector.

To enable closer collaboration and knowledge share between educational providers and to ensure teaching meets the requirements of employers, IVOC has in place a special collaboration with the educational advisors of schools with fashion departments. In Belgium, there are many schools with a fashion department at both secondary and at undergraduate/bachelor level. In order to co-ordinate collaborative working between these schools, there is a partnership between both the social partners and the educational advisors at these schools through Mode Creatief Onderwijs"(Fashion Creative Education) forum (http://www.modeonderwijs.be).

Figure 7: Careers information, advice and guidance

Information, Advice and Guidance Best Practice Case Study: COBOT's IAG initiatives

COBOT has a number of strategic partnerships with employment and training providers to promote textiles studies and improve the image of the sector. The website http://www.TEXstream.be has grown to be an information kiosk for companies and individuals so that questions such as understanding who manufactures what textile products within Belgium, an introduction to various textile companies, career testimonials, overviews of research in the textiles field, and a summary of new jobs available along with news items are all available.

Recognising the need to engage with people with the textiles sector, COBOT has developed a website to promote careers and opportunities for both the next generation and experienced workers. The website http://www.wildvantextiel.be is a collaboration between schools, companies and social partners within the textiles sector. The website offers practical advice and information for people looking to study textiles at secondary and higher education level as well as supplying information on evening classes that may be available. COBOT are able to use their links with companies within the textiles sector to promote career opportunities and job vacancies. COBOT invites companies to advertise any job vacancies on this website. However, companies are expected to engage fully with the process and COBOT monitors feedback on whether job advertisements has been replied to ensure candidates receive feedback. This therefore enables links between employers and education and training to be made from one central location.

Furthermore, an online game has been developed by COBOT linked through this site called "textiel expert" http://www.textielexpert.be which acts as platform to test the textiles knowledge of young people and interest them in the sector in an engaging way. The game can be played in either a single or multi-player format and requires the player to roll the dice, with the aim to answer multiple-choice questions relating to textiles sector. The aim is to collect the coloured textile applications before making it to the middle and becoming the "Textiel Expert".

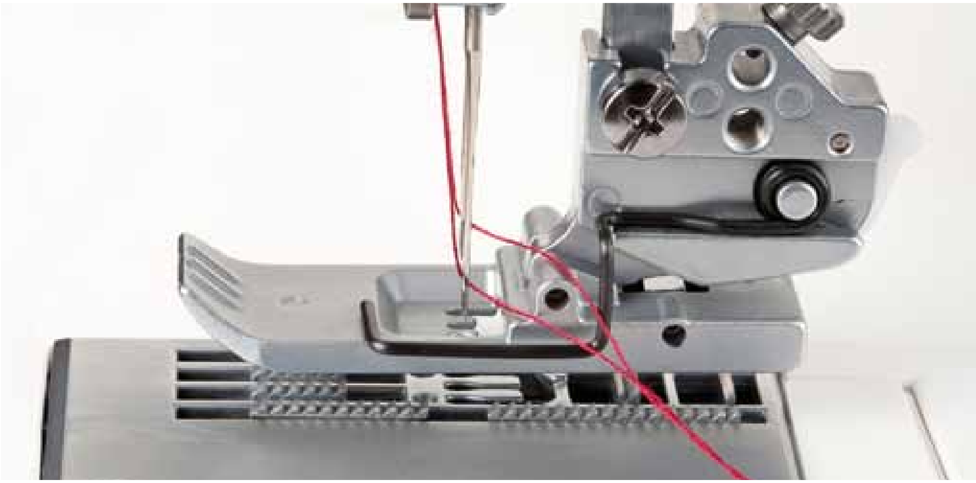
Creative Skillset has developed a number of tools to help with **promoting career paths** that includes the development of a careers portal so that both individuals and employers can see what opportunities can arise. **Creative Skillset** is responsible for developing an Occupational Function Map (OFM) for the Fashion and Textiles sector. This maps the level of competency an individual needs to undertake a job and the skills they should exhibit and allows employers and individuals to plot the level of skills required and the progression routes available dependent on the qualifications undertaken. In addition, **Creative Skillset** also maps NOS units so individuals and companies understand the competencies required for jobs and the standards needed, helping to identify training needs. Currently Creative Skillset is developing an online professional learning and information network, connecting people, companies, providers and support agencies to leverage investment, share best practice and facilitate access to CPD through a single careers resource.

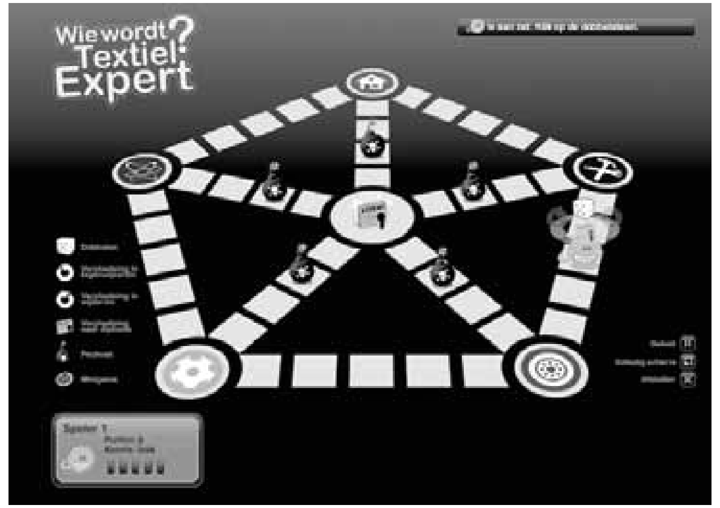
Given the difficulties many firms within the TCL industries have with face hiring staff, the **promotion of industry opportunities to new entrants** is an important activity undertaken.
OPCALIA provides to Pole Emploi (the national employment agency) information concerning the people working within the sector, the jobs available and companies employment needs to help inform choices. Furthermore **OPCALIA** has created a game called Success in Industry . This game was developed by CEFORALP, in partnershi p with MEDEF Rh´ne-Alpes, and their business sectors for Chemistry, Textiles, Plastics processing, and Metallurgy. It provides better information on industrial careers in the Rh´ne-Alpes region, and is available in educational establishments, training organizations, CIOs and local missions.

COBOT have a partnershi p with http://www.TEXstream.be to promote textiles studies and improve the image of the sector. The website has grown to be an information kiosk for companies and individuals so that questions such as understanding who manufactures what textile products within Belgium, an introduction to various textile companies, career testimonials, overviews of research in the textiles field, and a summary of new jobs available along with news items are all available. **IVOC** works in partnershi p with Flemish employment service (http://www.VDAB.be) to help with job guidance of job seekers in training within the industry and also educational advisors.

Creative Skillset works closely with the educational departments of the various devolved administrations in England, Scotland, Wales and Northern Ireland to provide career and industry factsheets and other associated literature.
This information is created using the devolved administrations own templates with **Creative Skillset** providing the content. These products are then used by schools and IAG organisations in order to understand more about the sector and advise young people of their options and their routes into careers within them.

ONC through the activities of UNIC have organised orientation sessions for young professionals and encourage them to consider taking the road to work in the tannery to overcome the lack of young people willing to engage with the sector. This has been achieved through working with munici pal councillors within various districts to organise these sessions and showcase the sector to potential new entrants





OPCALIA are a beneficiary of a new tool that has been created and which is available to students that are at the end of their high school education called Professional Discovery. This programme is taught for two hours every week, promoting the different career opportunities that exist within the job market. The Professional Discovery module (6 hours per week) is more specifically aimed at scholastically-challenged student volunteers. This module is in keeping with the goal of cutting back unqualified field tri ps in the education system. The main objective is to help students build their own personal education project through an understanding of the world of business. In addition, to assist with the learning, a kit has been created for teachers which include a navigational aid that presents the important functions of the website, as well as a quiz for students. This programme has allowed **OPCALIA** to develop sessions for schools to present information on the jobs and training courses to schools so that teachers can help present the sector and its opportunities. **OPCALIA** also have a website that allows the public and existing employers to understand what training courses and jobs are available within the sector.

IVOC plays an important role within the area of internshi p of students and job seekers with competency based training and programs offered which are developed on the basis of the professional online competency assessments based on competency profiles. Using this system, the individuals strengths and weaknesses are highlighted to therefore ensure all training and internshi ps are effectively tailored to the competences required by the company and the training needs of the individual. Similarly, **IVOC** have also produced orientation training to facilitate the integration of newcomers in their new environment; someone who has just arrived in the company or has changed jobs internally and provides structured practical training.

Promotion of training opportunities is also a central role for each of the ISPs. **OPCALIA's** regional/territorial offices often organise meetings with employees in order to present them with the different training possibilities available and the courses they are entitled to have. **OPCALIA's** website also provides information concerning the sector and available training providers which can be used by workers to manage their own career skills and have a global vision of their structure to help inform their choices.

To ensure employers and individuals have an understanding and access to the training opportunities available, **Creative Skillset** maintains a course directory that collates all available training as well **Creative Skillset** accredited courses. These include 845 courses at HE, FE and short course level, all of which have been collated onto this website and allow informed choices to be made. In Belgium, training information can be found to find via the Internet from external sites and the role of IVOC in this area is therefore limited. For example, the website http://wordwatjewil.be combines virtually all publicly funded training opportunities for adults (employed and unemployed) in the Dutch-speaking part of Belgium. In the French speaking part, there are the equivalents http://orientation.be, http://formabanque.be and http://dorifor.be.

Open Houses and allowing potential new entrants to see for themselves the working environment of TCL firms are also initiatives undertaken. Within France, industry week (La semaine de lindustrie) involves a series of events organised throughout France to promote industry to the general public and specifically to young people. Its goals are to, change the industrys image among youth (middle school, secondary, college and university students), as well as the general public in the Franche-Comt region, bring together players in the Franche-Comt industrial sector. Each partner can use this nationwide exercise to organise an event (company tour, workshops, conferences, etc.), which is part of the regional program that this operation aims to achieve.

7 http://courses.creativeskillset.org/

Information, Advice and Guidance recommendations:

How ISPs can adopt optimum practice measures:

- *By ensuring the ISP understands job roles and career opportunities within the sector so information can be disseminated.*
- *Foster employer, provider and school partnerships to ensure students are able to understand the career opportunities available.*

How the EU-TCL can assist on a national level:

- *The EU-TCL can provide a portal for careers advice and guidance, disseminating national initiatives and publicising these.*
- *Disseminate best practice initiatives amongst ISPs to ensure options are understood for engagement with IAG materials.*

Commercial activities that can be undertaken by the EU-TCL:

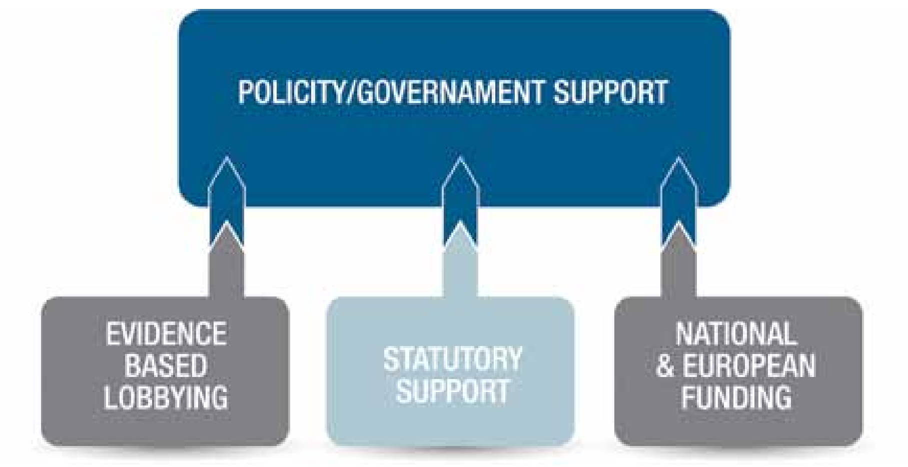
- *Through the ISPs, the EU-TCL could look to develop job profiles and competency information for non-EU-TCL member nations.*
- *Consider a members portal for advice and guidance*

Impact

The development of IAG and careers information is important to allow the TCL sector with its ageing workforce and poor public perception to portray the sector accurately and positively to attract new able recruits as well as offering the existing workforce an understanding of career options and training opportunities. Positive developments that bring together both demand and supply side partners within this sphere have an impact, highlighting both the TCL sector in a favourable light but also vast array of opportunities available, ensuring new recruits are engaged and available for working opportunities within the TCL industries, preserving many skills that may otherwise be lost.

4.6. Policy

Figure 9: Policy



Enabling skills solutions to enter the market by influencing policy (by responding to government and making our own position clear) allows products and services to be recognised and supported by policy makers. This is a key part of ensuring skills solutions can gain the necessary traction to allow them to flourish and have support from stakeholders. Whilst each of the ISPs have their own remits and resources, much of the policy based work of ISPs revolves around lobbying for resource around their skills activities and solutions, ensuring statuary support for the industries they represent and levering national and European funding for projects

Many of the ISPs work with policy stakeholders in different ways to ensure their products and services are supported and create awareness amongst government stakeholders. As IVOC and COBOT work in partnership with the Flemish government, they have the ability to form technical proposals and amendments to existing policy proposals and to offer advice on the effectiveness of certain procedures. IVOC and COBOT have sector agreements with the Flemish government which are renewed every two years (around 30 sectors with an ISP have this kind of agreement).

These agreements are policy implementation agreements whereas ISPs agree to connect education and the labour market; champion lifelong learning; and champion diversity. The ISPs progress is reported back to the Flemish government where lessons learnt and success stories are communicated. These, also provide a forum for each of the sectors bound by the sector agreements to understand best practice. In this way, IVOC and COBOT are able to communicate with Government to ensure success stories are heard and in this respect influence policy.

Creative Skillset has developed a number of tools to help with **promoting career paths** Many of **OPCALIA's** products and services that they develop are co-financed at a regional, national and in some cases European level through the European Social Fund. They are all evaluated and presented to the funding and steering committees and in many cases outputs of these are recognised nationally by the State. An example of this has been the Government support that has led to the creation and on-going support for the CQP and CQPI initiatives.

ONC too has a lobbying and policy function that enables them to push through programmes that help industry. The Technology of Leather programme as set out in the development section was approved by the government following a joint statement between the various Unions that including UNIC, and the President of Culture, Science and Education of the Chamber of Deputies that have called for its implementation as an immediate concern due to the vast industry requirement for this training.

Within the **ONC,** UNIC has a National Labour Contract that oversees the Contract of Apprenticeship. This grants UNIC a central role in employment policy and training requirements, providing an instrument for promoting youth employment and integrating the school system, work and training. The impact of this is that it ensures UNIC is able to ensure the contract is conducted in accordance to the needs of sectoral employers, employees and job seekers.

Similarly, **Creative Skillset** works closely with a number of government departments such as the Department of Business, Innovation and Skills, the Department of Education and particularly, the Department of Culture, Media and Sport (DCMS) for whom much of **Creative Skillset's** initiatives impact organisations within this departments jurisdiction. **Creative Skillset** has been handed a leading role by DCMS by being invited to Chair the Creative Industries **Council Skills** Group, an advisory body set up by the DCMS to look at skills within the sector and feedback recommendations to the department. Creative Skillset has two fashion and textiles employers who sit on this group. This enables Creative Skillset to have a leading role in shaping the Creative Industries skills agenda and ensuring recommendations and actions are what are required by the employers represented by the remit of this group.

Policy recommendations:

How ISPs can adopt optimum practice measures:

- To produce a policy stakeholder map to understand whom it is that requires *influencing, why and how.*
- *Ensure policy makers are aware of the ISP's position, what they undertake and voice is heard.*

How the EU-TCL can assist on a national level:

- *Assist and back national ISPs in policy consultations and funding opportunities at a national level.*
- *To form a clear policy mandate to actively promote the EU TCL, its members and their activities at an EU level.*

Commercial activities that can be undertaken by the EU-TCL:

- *Forward the case at European level for the importance of the initiatives undertaken by the EU-TCL and ISP partners to ensure investment, funding opportunities and wider consultative work may be available or lobbied for.*

Impact

The impact of effective policy work is that both internal strategies are consistent with organisational priorities but also that these policies, and the requirements of the TCL industries are heard and understood by policy makers. By being able to articulate these has enabled leverage to be gained and for products and services to be made available to the sector that may not otherwise be available.

4.7. Marketing/Communications

Effective marketing and communications relates to how an organisation is able to communicate its products, services and activities to the wider world, including employers, individuals, educational providers, governance organisations and other partners.

Ensuring each national partner can communicate effectively with a variety of social partners and the wider public so all can understand the activities that are being undertaken is something all national partners undertake. Whilst all undertake this work, there is a breadth of mediums for marketing and communication activity adopted amongst the national partners.

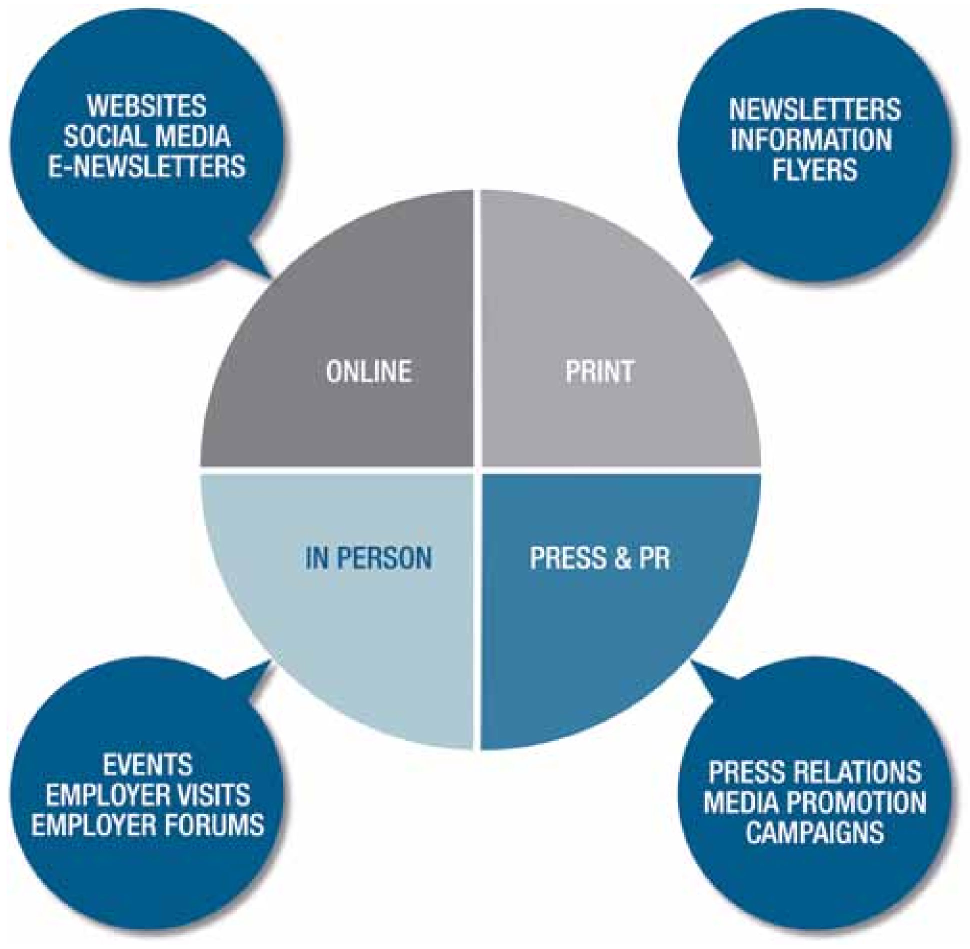


Figure 10: Marketing and Communications activity

Exploiting electronic communications are central to ISPs communications strategy with the large number of audiences they interact with **websites** acting as a central portal for information sharing. **IVOC** has its own websites http://www.ivoc.be, http://www.irec.be and http://modeonderwijs.be which are regularly updated with content to communicate with their audiences. **OPCALIA** have a website that allows the public and existing employers to understand what training courses and jobs are available within the sector whilst **COBOT** has an organisational website which acts as a focal point for their activities. **Creative Skillset** website is the central portal for their work, including dedicated sections for fashion and textiles as well as development activity and IAG information.

Additional to website activity, **IVOC** produces an electronic newsletter that appears on an ad hoc basis whilst **COBOT** has made a strategic decision to now only communicate electronically. To enable this, **COBOT** has a number of different mailing lists which it shares targeted communications with (i.e. employees who have undertaken training courses, human resource managers, production managers, safety officers etc.) **Creative Skillset** electronically publish a regular newsletter which follows the Creative Industries as well as an ad hoc publication specific to Fashion and Textiles called Follow the Thread which updates interested bodies on the mailing list of activities being undertaken by **Creative Skillset.** This newsletter is also used as an engagement tool, used to recruit people to events or to publicise help required for development work.

Social media has become a crucial way of communicating with the popularity of various mediums within this sphere continuing to grow. **IVOC** have demonstrated this by recently launching a blog http://ivocopleiding.wordpress.com in which to engage with their audiences whilst **COBOT** also have these social media measures in place to publicise a number of their skills solutions. **Creative Skillset** have a substantial following on both Facebook and Twitter, with both regularly used by **Creative Skillset** to offer updates on activities being undertaken as well as any careers or training opportunities and to keep the organisations profile high. **Creative Skillset** is also soon to start a twitter/blogging campaign to encourage firms to take on apprentices whilst other plans include establishing a LinkedIn network for educational provider groups. A major development is **Creative Skillset** looking to encourage employer-led Group Training Associations which will look to increase interactions and communication between these groups more convenient.

Of all of the national **ISPs, paper communication** remains the most important means to **IVOC** who produces the IVOCatief newsletter which is published three times a year and the staple communication with industry for **IVOC** finding this the most effective way for **IVOC** to communicate with the sector.

Inter-personal marketing and communication activity also forms an important part of sharing ISPs message with their audiences. **IVOC** communicates regularly with its social partners with **IVOC** providing a forum for the development and implementation of labour market policy **IVOC** and its partners provide.

IVOC also facilitated direct communication with **employers** within the sector. This is conducted through the strategic partnerships **IVOC** enjoys with the employers organisations CREAMODA (Clothing) and FBT (Textile care). Communication with these organisations is on a bilateral arrangement with these organisations used as conduits to implementing company training plans. Face-to-face communications remain of undoubted importance to **COBOT** who regularly organise informative meetings (typical examples include human resource managers and production managers) to explain new projects and/or activities being undertaken. Face-to-face contact with employers is also something that **COBOT** is able to do regularly and is the most important communication **COBOT** have. 80 per cent of textile companies are within 30 minutes by road which facilitates this type of communication. **Creative Skillset** maintains communication with employers through both the interactions with the various forum and development activity but also through face to face meetings on an ad hoc basis as and when required.

Whilst direct communication with employees is limited which is normally the domain of Trade Unions, **IVOC** has contact with a group of around 200 employees who are training on their own initiative (independent of their company or employer) yet are coached by **IVOC** through their training programs. **COBOT** encourages communication with employees through engagement with their open courses available to individuals for which they have unlimited access to **COBOT's** training information.

Press and Public Relations activities are embedded within **Creative Skillsets** work with a dedicated Press and PR function which allows press releases of activity and events to be sent out, as well for the monitoring of news feeds for information relevant to their operations. **Creative Skillset** was also centrally placed in a recent Channel 4 documentary called Marys Bottom Line. Within this documentary series, the well-known British retail expert Mary Portas attempted to bring clothing manufacturing back to the UK by setting up a factory producing ladies underwear. The apprentices were recruited from the local community and employed on Creative Skillset apprenticeshi ps, thus communicating the learning opportunities available in the TCL sector. **Creative Skillset** has also supported a campaign launched by the British publication Drapers, the Fashion Business Magazine that launched a Save Our Skills campaign. This campaign, aimed at encouraging the manufacture of fashion and textiles goods back in the UK and with it retaining and encouraging the skills required to manufacture, is backed by a number of significant sector players and associations. This campaign been highly significant in putting the issue of UK manufacturing and the skills required to undertake this endeavour into the public domain and bringing the issue to attention of government.

Furthermore, contests to promote the industry have been used by UNIC to highlight opportunities within the sector. UNIC launched a nationwide contest for students in orientation in their third year of middle school in the main Italian tannery districts. Competing classes were invited to copy a work of art, and give free rein to their creative skills while working with hides. Each class was free to choose its topic and techniques. The competition had strong student partici pation, and, guided by their teachers, they expressed a high level of creativity imitating artists like Leonardo, Caravaggio, Van Gogh and Picasso. This great event was attended by many young artists, and all entries were judged by a group of entrepreneurs, designers and experts.

Attendance of job fairs also plays its part in promoting the sector and OPCALIA partici pates in this activity. Every year in the Rh´ne-Alpes, the Mondial des m tiers or World of Careers job fair opens its doors to 140,000 visitors over four days. A real gateway to the industrial world, the profession is fortunate enough to have a stand with which to fully display its ambition: promoting the Rh´ne-Alpes as a top textiles region and attracting young talent its companies.

Impact

Effective marketing and communications strategies ensure that products, services, policies and organisational awareness are available to a variety of audiences. Ensuring this means an increased visibility and with it an increased likelihood of engagement with the specific audience or audiences. Whilst marketing and communications activities require products and services available, being able to market these, bring attention to them increases the likelihood of a successful uptake.

Marketing and Communications recommendations:

How ISPs can adopt optimum practice measures:

- *Establish why they want communications, what they wish to communicate.*
- *Ensuring that ISPs have a clear understanding of their industries and communication channels with these.*
- *Communications, especially using social media and email campaigns can be an inexpensive way of targeting large numbers of employers.*
- *Have a collection method for employers and an up to date CRM so key messages can be targeted.*

How the EU-TCL can assist on a national level:

- *To host and promote individual ISP initiatives through both the EU-TCL website and social media feeds.*
- *For the EU TCL to promote itself and raise awareness of its existence as a forum for best practice through its various social media outlets.*
- *To develop a database of social partners and employers to disseminate information widely.*

Commercial activities that can be undertaken by the EU-TCL:

- *Ensure marketing and commercial activities showcase the work of the both the EU-TCL and its partners, demonstrating best practice and consultation activities that could be undertaken.*

5.CONCLUSIONS AND RECOMMENDATIONS

This paper has attempted to report on the key activities undertaken by the EU-TCL ISPs and how each employs a variety of measures to engage employers and training together within the sector. Whilst it is important to recognise how each of the different partners works under different mandates, using different levels of resource, and the different political, social and economic environments specific to the country they operate in, all undertake similar functions. This is highlighted by the analysis of the seven key areas identified within the initial discussions and feedback from partners and how many activities overlap.

This report has highlighted areas of best practice in each of the seven key areas from which each partner can take information and observe if any would be viable for integration into their own operations. In this respect, this report has shown each partner a variety of different products, services and approaches to overcoming the similar issues each encounters within their own territorial remit of the up-skilling and image issues that occur and how best employment and education can come together to ensure the sectors can be as successful as possible.

Importantly, it allows the European TCL observatory in its formative years to understand what observatory partners are currently undertaking and what recommendations the observatory can act on in the role of bringing employers and training providers. multiplier effect and lead on activity

Recommendations

Each of these recommendations is aimed at serving as a multiplier effect for the EU-TCL building on the work of the national partners and ensuring employers have access to the right skills on a European basis.

Governance

- *That the EU-TCL continues to ensure European level social partners are represented within the Council along with the regional observatories to give the EU TCLs activities credibility with the industry.*
- *That these governance structures are able to tie in with other European level activities within the TCL sectors to ensure purpose and clarity of work. An example of this is the recent ESCO work.*

Research

- *That the EU TCL ensures a mechanism is in place for research to be collated in one place. This will therefore allow the EU TCL to act as the central resource for research and information sharing.*
- *To ensure the EU TCL is seen as an active contributor and authoritative voice within the skills agenda; to attract traffic to the website; and to inform on-going work of the Council, to investigate the procurement of purchasing of regular statistical economic and labour market information from organisations such as Eurostat. This will allow an understanding of economic and labour market trends at a European and comparable national level to be undertaken.*

Partnership

- *That the EU-TCL identifies partner organisations and stakeholders who can be informed of the activities of the EU-TCL.*
- *That the EU-TCL remains aware of any funding initiatives that will be appropriate to national partners, and to facilitate such partnerships.*

Development

- *That the EU-TCL uses the multiplier effect of numerous national observatories to bid for development activities on a Pan-European basis that complements and strengthens on-going national level initiatives.*

IAG/Careers

- *Promote career opportunities that exist within the sector through the councils activities.*
- *Ensure national level initiatives are well supported and publicised to a wider audience.*

Policy

- *To identify the key stakeholders and bodies the EU-TCL must influence to ensure its activities are an on-going success and continue dialogue with these bodies.*
- *Ensure the EU TCL Skills Council responds to EU level consultations where appropriate.*
- *Highlight the policy of work of member EU TCL organisations ensuring these are known at an EU level.*

Marketing/Communications

- *That the EU-TCL widely publicises its website, the organisations involved and its objectives through a regular electronic email available from the website.*
- *That the EU-TCL set up and maintain Twitter and Facebook accounts to publicise its own work and that of partners.*
- *That the EU-TCL makes the appropriate links to communicate through its work.*

Annex 1: The Interconnectivity of the Seven Areas of Activity

	GOVERNANCE	RESEARCH	PARTNERSHIP	DEVELOPMENT	IAG/CAREERS	POLICY	MARCOMMS
GOVERNANCE		Good governance allows the aims and objectives of research to be consistent with the organisations strategic priorities and objectives	Governance allows partnerships to be strategically informed and enables these relationships to be purposefully sought.	The development of products and services is an operational outcome strategic direction.	IAG/Career development work is informed by governance structures and their strategic requirements.	Clear strategic governance and identified objectives allows an organisation to develop policy that enables their vision and influence external thinking.	Clear strategic governance allows an organisation to communicate its products and services confidently to a wider range of stakeholders.
RESEARCH	Research informs the strategic direction of an organisation, understanding the issues that the organisation needs to overcome.		Research informs the relationships that need to be nurtured and informs their requirements.	Research is central to the development of products and services, understanding what, why, how and for whom.	IAG and careers information is reliant on research enabling careers information to be quantified and understandings of the sector to be conveyed.	Research enables policy to be evidenced and substantiated.	Research informs much of the Marcomms activities, allowing evidenced messages to be communicated.
PARTNERSHIP	By forming strong partnerships, these can strengthen governance structures and bring people and organisations into the skills arena.	Partnerships are a vital conduit to forming relationships that allow research activities to occur.		Partnerships are required to ensure the development, design and roll out of skills solutions can happen.	Partnerships allow organisations to become involved within IAG activities, both in their design and development but also promotion of these organisations.	Partnerships allow consultation with key stakeholders and individuals to allow policy decisions to be made that strengthen partner organisations as well as ourselves.	Partnership working enables links with organisations to be made and to promote the sector to a wide number of stakeholders.
DEVELOPMENT	The development of products and services informs strategic priorities of what works well for social partners.	Development of products and services helps inform research and evaluation into the impact of solutions.	Development and understanding what is required for a product or service to go live helps to inform partnership working.		Development work allows us to develop IAG/Careers advice in our sector to existing and new recruits.	Understanding what products and services are available and the requirements to ensure their take up is important in allowing us to understand policy requirements.	Development helps to frame Marcomm activity and the products and services marketed and what needs promoting.
IAG/CAREERS	The requirements for and the need for IAG information that can be seen as short, medium and long term requirements and a focus of governance.	IAG and careers activities help with research activities by highlighted job roles and career opportunities.	IAG activities bring together a large number of stakeholders who can be involved in IAG/Careers activities.	IAG/Careers activity helps to inform what gaps in developing products and services there are.		IAG/Careers work informs policy requirements, helping with the career and information development products available through policy.	IAG/Careers work helps to inform whether communications around access and careers information for young people entering the sector.
POLICY	The requirements of policy can influence how an organisations governance structures and strategy are enacted.	Policy and its needs influence the type and level of research required on specific issues.	Policy influences the requirements of partnership working and focus of these interactions.	Policy influences development activity by prescribing the types of training and initiatives external organisations will fund.	Policy can influence the types of careers and IAG information that is required.		Policy can dictate the types of messages disseminated and the specific targeting of groups and individuals required in the process.
MARCOMMS	**Marcomms disseminates the governance structures and organisational strategies being undertaken to wider audiences.**	Marcomms can be used to both publicise research activities and act as a conduit for involvement.	Marcomms encourages partnership working through conveying messages to a number of different audiences to bring them together in the skills agenda.	Marcomms enables employers, training providers and stakeholders to understand what qualifications and help are available.	Marcomms ensures individuals and employers are able to understand the skills landscape is an important area of need.	Being able to pro-actively promote our policy positions through marcomms activities promotes sector leadership and industry awareness.	

European Skills Council
Textile Clothing Leather

Report #3

Innovative tools and procedures
in employment/training policies
in the textile/clothing/leather industry

This report has been elaborated
with the support of the European Commission

0. SUMMARY

1. TRAINING CHALLENGES IN THE TEXTILE AND CLOTHING SECTORS

The economic and social challenges facing the textile, clothing and leather industry in Europe have led affected federations in all European Sector Council countries (Italy, Belgium, Great-Britain, France) to prioritise questions of human capital and the quality of human resources.

Qualified labour and skills are in fact essential to maintaining a competitive industry. Thus, beyond the two major economic challenges that the sector is facing – namely intense competition from China, India and other low-cost textile-producing countries, and weak exports,(except in the UK); it also faces issues with employee skills and training. This need is focused around a number of key observations.

The Aging Work Force and its Consequences

Member countries all agree that textile/clothing/leather employees are aging. In European producer-nations, companies are gradually being hit by this ongoing 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 companys 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.

The Problem of Attractiveness and Recruiting Difficulties

The TCL sector is facing a palpable paradox in the four countries under discussion: after experiencing serious economic difficulties, they have lost a significant part of their work force (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 Increasing Rarity of Ongoing and Initial Training

Specialised training models, both ongoing and initial, have mirrored changes in work force numbers.
In fact, on the one hand, companies demand for training has fallen quantitatively, while on the other, training personnel, who are often former employees in the sector, continue to age alongside employees. All in all, following the logic of economic flux, initial training has trended downwards.

The companies profiles : too small, not enough time for HR management

SMEs, which make up most of the TCLs economic fabric (90%), struggle to settle human resources practices, lacking both the time and the means. Moreover, motivation, maintenance and development of employees skills are essential conditions for maintaining companies prosperity, productivity, and innovation.

The Need for Better Qualifications

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

This dematerialisation of companies has allowed them (or will allow them) to boost qualifications, responsiveness and creativity.
Beyond the social drama that it has created, the outsourcing of production activities has led to the emergence of new, more qualified vocations, some of which now attract a younger work force. Support positions have developed significantly, pushing up total payroll in the sector, despite falling numbers in the work force. Thus, the issue in this sector went from being exclusively economic (manufacturing costs) to one of skills (the need for qualified labour).

A Changing Training Model

Training has also changed in response to some changes in teaching practices. These practices have been significantly transformed over the last 10 years and continue to evolve due to an increasing demand to tailor training to individuals, and due to contributions from technology and an awareness of sponsors and interns of the need to consider career paths and not only training itself. Thus, educational engineering has changed, and tools have been specifically designed for the Textile-Clothing-Leather sector, in response to the progressions and observations cited above.

2. SPECIFIC ISSUES IDENTIFIED

These observations have led to a few issues that can be summed up as follows: due to a wide variety of changes (fashion, technology, markets…), Textile-Clothing-Leather companies must develop efficient training systems to maintain skill levels among their staff.

Moving forward, this will help companies to remain competitive, and allow employees to reinforce their job readiness – a win-win situation.

It is therefore important to provide companies with the tools to manage human resources in the longer term by helping them to implement forward-looking management of jobs and skills or Gestion Prévisionnelle des Emplois et Compétences (GPEC), in order to adopt pre-recruitment and loyalty-building strategies for young and potential employees, and to better detect their needs in terms of skills.

At the same time, it is important to constantly adapt training systems to companies' needs at both quantitative and qualitative levels.

Finally, it is important to promote the training paths established and to recognise this dual investment by developing certified training programs.

These issues are all the more striking since TCL-sector companies are mostly small and medium enterprises.

Many of them have been or were weakened by the economic crisis. In the face of falling sales figures, improving organisational procedures and skills is a particularly important strategy.

However, they do not have the same means as large firms, and as a result, have developed support and advice mechanisms, along with financing solutions.

Here is a list of the various issues identified, without considering which of the four countries was questioned:

Match Needs to Training Systems

1.Better utilise tools involved in initial training, training systems, orientation, professionalization, and ongoing training;
2. Enable and support very small businesses more specifically;
1. Design year-round oversight and initiative structures;
2. Increase access to existing tools (anticipation and support: GPEC, agreements on procedures, reclassification, restructuring)

Offer opportunities to employees in the sector

1. Secure professional development, improve transitioning, promote employee loyalty
2. Fight job insecurity in the industrial field
3. Promote technical careers

Create and maintain jobs

1. Diffuse tensions surrounding supply and demand of employment in the industry*
2. Enable the evolution of jobs
3. Retain knowledge (databases, mentoring…)
4. Secure renewal from one generation to the next
5. Attract more youth to the TCL sector and make its careers more attractive

3. WORK METHODOLOGIES AND TOOLS IDENTIFIED

In the interest of sharing best practices among colleagues, a report presenting tools and innovative procedures (national/regional/local/company) was drawn up and implemented by the OPCALIA TCL division with the aim to help face these issues in the various countries affected.

A questionnaire was sent to various partners in June 2012. (CREATIVE SKILLSET/IVOC/COBOT/OSSERVATORIO NAZIONALE CONCIA).

An analysis of the collected data was conducted over the summer and resulted in the current report – produced in draft in September 2012 and in its final version in December 2012

In response to the data collected, the following outline was chosen to present the information:

1.General diagnosis of the situation within the TCL sector
2. Summary of the main issues raised, including those during various round table discussions for the first half of 2012
3. Breakdown of tools and best practices developed in the UK, Belgium, Italy and France based on three components: anticipation/support/attractiveness.

Each of these components was subdivided into large objectives, illustrating tools and procedures shared by each contributor.

4. WORK METHODOLOGIES AND TOOLS IDENTIFIED

The first step is to anticipate future needs and skills in order to help companies and their employees' progress in their jobs or change their focus.

In this section, we will analyse tools and processes at the companies' disposal, which allow them to identify activities, jobs that are growing or threatened, and help companies to prepare for the necessary transitions.

4.1. Diagnostic tools to help companies Anticipate their skills needs

Diagnostic tools to help companies anticipate their needs for skills

TOOL 1: Occupation Sheets

The role of Career monitoring bodies like **CREATIVE SKILLSET, COBOT; IVOC, ONC, OPCALIA TMC** is to analyse real work situations and foresee jobs of the future.

Thus, they are able to provide a repertoire of all occupations to companies in the sector, outlining the entire list of careers in the sector, along with the knowledge, skills and training required for each. This work has multiple objectives:

1. Spread knowledge about careers to a wide range of public (young adults, employees, job seekers)
2. Help as many people as possible to build successful professional careers
3. 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.

COUNTRY: Belgium
ORGANISATION: IVOC and COBOT
NAME OF THE PRODUCT: Competency Profiles

Understanding skills needs within occupations is also major priority in ensuring training solutions meet the competency areas required by employers. Both **IVOC** and **COBOT** have developed of competency profiles in conjunction with the Flemish government, employers and other social partners that cover many of the job functions within their respective sectors.

The validation of these competency profiles can only be done by the social partners to ensure their accuracy and relevancy.

COUNTRY: Italia
ORGANISATION: ONC
NAME OF THE PRODUCT: Occupational achievement

In a similar vein, **ONC** have developed occupational achievement quality assurance validation processes as well as associated competency profiles

COUNTRY: France
ORGANISATION: Opcalia TMC
NAME OF THE PRODUCT : Competency profiles

OPCALIA TMC conducts research with a variety of social partners into the evolution of job competencies and the related skills. The impact of this work is that this knowledge has fed into current discussions with national education with a view to revamping the di ploma programme for the TCL sector in France.

Thanks this studies, **OPCALIA TMC** has developed 100 competency profiles in conjunction with social partners and companies that cover many of the job functions within the 7 TCL sectors.

COUNTRY: UK
ORGANISATION: Creative Skillset
NAME OF THE PRODUCT : National Occupational Standards

OPCALIA TMC Creative Skillset is responsible for the design and development of National Occupational Standards (NOS or Standards) **which** are written in conjunction with a wide variety of employers and employees who work within the sector.

These NOS describe **what a person** needs to do, know and understand in their job to carry out their role in a **consistent and competent** way. NOS are the building blocks of qualifications, informing the design of qualifications such as Apprenticeshi ps. Currently there are 11 suites of NOS across the Fashion and Textiles sector with new NOS for Technical Textiles currently being drafted.

Creative Skillset also has a leading role in developing formal **vocational training**, working closely with employers, training providers and various stakeholders. National Occupational Standards are mapped into an Occupational Functional Map (OFM) This OFM maps various occupations relevant to fashion and textiles against the key competencies people have to demonstrate to do these roles.

This allows for skills solutions to be developed taking into account the level and type of competencies required for any specific role.

TOOL 2: Diagnostics

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 TCL 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 characterize the TCL sector of the regions in which they operate

COUNTRY: France/Belgium
ORGANISATION: Opcalia TMC & IVOC
NAME OF THE PRODUCT : Capital Compétences

Capital Comp tences is a thorough digital diagnostic and involves a 3-hour interview between the business executive and Jobs/Training advisor, and leads to the analysis and delivery of a personalized action plan.

This diagnostic is intended for any company wishing to get an inventory of its assets and development components in order to implement a personalized action plan.

4.2. Support for Companies' HR Policies

Developing skills solutions with employers, providers and other partners ensures products and services meet industry needs, ensure that they are fit for purpose and meet the expectations of the end user.

Support for small and mediuam sized businesses implementing their training policies

Motivation, maintenance and development of employees' skills are essential conditions for maintaining companies' prosperity, productivity, and innovation. However, the training situation in SMEs is contradictory.

On the one hand, ongoing training is considered a crucial aspect of competitiveness in the context of globalization. On the other hand, statistics show that employees working for SMEs are less likely to have access to ongoing training and qualifications than employees of large businesses.

The TCL profession is working to develop and assist companies to effectively integrate training and skills development, by attempting to overcome both internal and external obstacles that affect SMEs.

TOOL 1: Financing

As a result, work in the profession in various countries is focused on removing organisational barriers and obstacles to training; which also leads to the liberation of financial means, as well as support/advice that helps the company design a training plan according to its size and more importantly, its needs.

COUNTRY: France
ORGANISATION: Opcalia TMC
NAME OF THE PRODUCT : Validation des Acquis de l'Expérience

As part of its mission, **OPCALIA** finances employee training using various existing mechanisms: training plans, contracts, professionalization periods, "DIF"s (Individual Right to Training), skills assessments, "VAE"s (Validation des Acquis de lExp rience).

OPCALIA also co-finances European, national and regional projects to reduce its training costs.

COUNTRY: Belgium
ORGANISATION: IVOC
NAME OF THE PRODUCT : The training portfolio system

The IVOC training portfolio contains a budget that social partners provide to companies to contribute to executing a training plan. The training portfolio system entails that training be established within a specific structure, then be implemented and evaluated.

The system has been used in the clothing industry since 2000. In 2007, social partners in the textile care industry decided to implement the system in that sector too.

Companies can simply request this support by telephone or online. In the first phase, **IVOC** and the company agree on the two main conditions for the training portfolio:
- The analysis of training needs- The organization of consultations with the workers. This is done via a personal interview. Specifically, we determine how training needs are identified and how employees are informed about or consulted regarding training.
These agreements are put on paper, approved and confirmed by the social partners.

TOOL 2: Help Developing the Training Plan

In addition to their primary mission of managing training funds for all cases in Belgium, Italy and France, for some years now, monitoring bodies (or associated units) have structured and financed integrated upstream service offers for training, aiming to support participating companies to achieve better control of their HRM procedures, and especially their training policies.

COUNTRY: Belgium
ORGANISATION: IVOC
NAME OF THE PRODUCT : Collective training sessions

IVOC provides collective training sessions to Clothing and Textile Care workers according to a set timeline. These training sessions are completely financed by IVOC (free of charge for the companies in question).
Training needs can be identified in various ways. The company can decide which operating method is the most efficient to accomplish its training plan.

- The company makes its own analysis, and **IVOC** proposes instructions. There is no financial compensation provided in this case.
- The company asks **IVOC** consultants to help with the charting process. In this case, there is an allowance of euro 15/h for each employee who helps draft as part of company training.
- The company works with an external consultant. Again there are two choices: take an experienced IVOC-partner or propose a new one.

The latter must be presented to and approved by the social partners. **IVOC** does the work at the cost of the external consultant for euro 250 per employee, to a maximum of euro 5,000 per company, for which a systematic needs analysis is completed.

IVOC provides a checklist of learning needs in different areas. It is required to support face-to-face discussions with individual employees. All companies who have recourse to **IVOC** support, are assigned to an **IVOC** project coordinator. This coordinator follows the training plan, from needs analysis to the evaluation and calculation of financial support.

TOOL 3: “Label” of quality, innovative training Plans

Ongoing employee training constitutes one of the main tools that companies possess
for developing skills and responding to growing market demands.

To help employees and companies contextualize their training model and to help organizations known for their quality of services to maintain their success, TCL sector have designed collective training models, to be implemented by authorized organizations.

With collective initiatives, companies and employees benefit for “turnkey” training:

1. defined training programs,
2. stringent selection of training organizations,
3. financing of all or part of costs.

The objective of these initiatives remains to promote access to training all employees in all types of businesses, by designing programs that respond to the real needs of people and companies.

COUNTRY: France
ORGANISATION: Opcalia TMC
NAME OF THE PRODUCT : Cursus Labélisés

OPCALIA’s own quality assurance measure for training called Cursus labellises.

For training to meet Cursus labellis s standard, it has to be adjudged to be designed specifically for the needs of the TCL sector across all types of training (for instance, management and leadershi p training that is designed for TCL employers) and meet strict specifications defined by the social partners (length, content, pedagogical methods.)

COUNTRY: UK
ORGANISATION: Creative Skillset
NAME OF THE PRODUCT : The Tick

Creative Skillset runs a quality assurance scheme known as the Tick.
Creative Skillset accredits courses within the sector that reach a certain standard.

For courses to be earn Tick accreditation and carry the branding, they are subject to a rigorous assessment process undertaken by **Creative Skillset** that gives confidence these are courses that meet employer requirements.

Currently within Fashion and Textiles being part of **Creative Skillset's** remit since 2010, the Tick process has been subject to a successful recent pilot which is currently being rolled out

COUNTRY: Italia
ORGANISATION: ONC
NAME OF THE PRODUCT : Technology of leather course

To overcome chronic shortfalls of skills young qualified engineers within the sector, **ONC** in partnership with the Ministry of Education, Universities and research have developed a course in higher technical education sector-specific technologies called Technology of Leather . The course teaches the basics of chemistry and the manufacture of leather, product and process innovations whilst also enhancing schools existing laboratory facilities.

ONC also develop courses aimed at professionals (for instance managers, technicians, buyers, designers, managers and sales people etc) within a diverse number of areas where leather is used (for instance car interiors, furniture and clothing.)

These courses encompass a wide variety of processes and techniques relevant to these occupations.

COUNTRY: Belgium
ORGANISATION: IVOC
NAME OF THE PRODUCT : Free training program

Thanks to the sectoral contributions of businesses, **IVOC** and **COBOT** are is able to offer a free training program. It is largely common training program for both sectors (textile and clothing).
This includes Technical, Communication, Organisation, Logistics and Human Resources training, among others.

These training programs are collective, but as soon as the business has at least 5 interested employees, **IVOC** can organise some in-house training sessions.

Support for hr function deployment in companies

We moreover noticed that, due to their organisation and lack of support functions, very small businesses have even less access to existing tools to support their progress and development.

Furthermore, many small business owners lack the time and assistance to define or improve their business strategies and the Employment/Training policy that comes with it. In most of the countries surveyed, tools ranging from computerized equipment to the owner's customized support were provided to companies.

The underlying goal of providing equipment is to bolster the management of human resources in these companies.

TOOL 4: Computerized Equipment for HRM

Human Resource Management (HRM) is intended to identify and develop skills among staff, in order to improve the organisation's efficiency. However, SMEs, which make up most of the TCL's economic fabric, struggle to employ this type of practice, lacking both the time and the 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 so 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 in fact they do have one, they are not official (no way of tracking notices from associates or supervisors, nor desires for change, 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 the SME public.

COUNTRY: France
ORGANISATION: Opcalia TMC
NAME OF THE PRODUCT : Extr@compétences

Skill management solutions (HRSI) for small businesses in Textiles, Clothing and Leather.
The TextileClothingLeather monitoring body offers companies a secure extranet interface to manage jobs and skills. This solution has made it easier for companies to develop HR tools adapted to their needs: training plans, job descri ptions, HR dashboards, and age pyramids...

This pilot project is being tested from 2009 to the end of 2012 in 50 different companies. This test allows 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.

The monitoring body has an important database: each job in the textiles, clothing and leather sector is given a job descri ption that is available on the internet. These descri ptions entail the activities, knowledge and progressive trends in each job

COUNTRY: Belgium
ORGANISATION: IVOC
NAME OF THE PRODUCT : Competex tool

The Competex tool is a web application that helps register and manage workers existing skills, especially those of operators. The application is based on the structured training method, which **COBOT** implemented in companies many years ago.

The tool can be implemented either at the company or at the service level, and is accessible via a username and password.
The tools main feature is that it allows all jobs with their tasks, subtasks and critical skills to be stored and described (along with the level required).

TOOL 5: Strategic Function Support Tools for Companies

COUNTRY: Belgium
ORGANISATION: Cobot
NAME OF THE PRODUCT : I Design

To overcome the issue of textile designers needing to improve their knowledge and employability, COBOT have developed a pioneering programme called i-Design.

i-Design consists of a programme of demonstrations, workshops and exercises (encompassing 8 modules, and 24 separate sessions) that is aimed at improving designers knowledge of subjects such as raw materials, yarns and weaving skills.

Each separate module is led by an educational practitioner within the field being studied.

COUNTRY: France
ORGANISATION: Opcalia TMC
NAME OF THE PRODUCT : Management and support of VSE and SME executives' strategy''

The program entitled Management and support of VSE and SME executives strategy is intended to support and strengthen the VSE and SME executives approach to strategic antici pation.
This 19-day training session focuses on 4 modules:

- Individual diagnosis of the company: assessment of executive and company needs
- Collective seminar or workshop: a place for executives to exchange ideas
- Collective training module for the core program: strategic conduct and business methodology, awareness of strategic issues, understanding financial strategy.

Training is adapted to the specific needs of VSE/SME executives, with emphasis on:

- collective modules for executives to share personal experiences,
- methodology and content used to feed executives strategic ideas
- individual support to implement a corporate action plan

COUNTRY: UK
ORGANISATION: Creative Skillset
NAME OF THE PRODUCT : Fashion Alliance Toolkit

Based on sector demand, in partnershi p with the Centre for Fashion Enterprise, UKFT, British Fashion Council and NESTA under the collective name of the Fashion Alliance, Creative Skillset has contributed to the development of two practical toolkits involved in the fashion business aimed at smaller independent and self-employed businesses.

One toolkit is for high end designers and one for high end manufacturers, with both toolkits looking to develop commercial and entrepreneur skills and awareness. addressing the large number of business start-ups in these sectors but ones which also have a large early failure rate.

4.3. Support for Employees' Skills development

SMEs, which constitute the vast majority of companies in the TCL sector, at least in the countries under study, traditionally rely on ongoing training to a far lesser extent than large companies.

Within this framework, inequality of access is enhanced relative to other socio-professional categories, because training focuses more on coaching and proficiency.

In fact, companies use less structured and external ongoing training programs, while, in reality, they express the need for very specific training, which requires innovative approaches to transmitting professional knowledge.

To a greater extent than in large businesses, identifying and validating issues relating to informal learning plays an important role. Three conditions seem necessary for developing employee training in very small and SME TCL businesses:

- promoting the use of local services that fulfil an advisory role on the training market.

- encouraging businesses to form networks in their local areas – a source of economies of scale and customized training.

- developing specific training, adapted to the size, employee profile and vocation of businesses.

In this section, we will be looking at all tools geared towards responding to the following objectives:

1. Consider the situation of the first relevant levels of qualification according to activity sector

2. Identify components of training that should be favoured to better adapt the initial and ongoing training regime to changing needs

3. Design new solutions to maintain rare, but fundamental training

4. Strengthen the job readiness of employees in the sector and for other sectors, and make training a support tool for positive mobility.

5. Improve training organizations' awareness of the changing needs of businesses in the sector, to better prepare future employees for the reality of their future careers and the evolution of today's jobs into those of tomorrow.

6. Recognize knowledge acquired from training and work experience in order to promote positive internal and external professional mobility in the sector and to guarantee its employees work readiness.

7. Implement innovative training solutions (for example, open distance training), especially in areas without sufficient training structure.

Ensuring the path of employees with low-level qualifications

The TCL industry has a significant number of employees with low-level qualifications, who are made particularly vulnerable in the context of the accelerated renewal of markets and product and service lifecycles.
The number of employees with functional illiteracy in the industry is high and justifies concerted action.

TOOL 1: Initiatives in the Fight Against Illiteracy

COUNTRY: France
ORGANISATION: Opcalia TMC
NAME OF THE PRODUCT: Compétences Clés en Situation

To combat issues with illiteracy within the workforce, an issue that is unspoken within the TCL industry yet which causes issues for both the employer and the individual, OPCALIA has developed the "Competences Cles en Situation Professionnelle" (Key Competences needed in Professional Life) programme.

This vocational training has been developed so Opcalia company members are able to identify their employees with numeracy and literacy needs without using the term illiteracy.

OPCALIA is also resourced to visit individual companies, training providers and experts in illiteracy programmes to ensure the programme is being used, used correctly and refined to ensure its impact meets requirements.

TOOL 2: Initiatives to Refresh Skills

COUNTRY: France
ORGANISATION: Opcalia
NAME OF THE PRODUCT: 1001 Lettres professionnelle

The online 1001 Lettres (1001 Letters) program offered by Opcalia, serves as a refresher on basics in French, Math and Computers, while promoting adaptability and professional mobility.

1001 Lettres is a training solution that includes a multimedia tool and personalized support, which helps consolidate fundamental skills (organisation, writing, working safely, communicating instructions, and information processing) using concrete situations from work and personal life.
Practice:

> A customized training plan designed to respond to expressed needs (average length of plan: 70 hours).

Organising the preservation of key knowledge to be transmitted

The transfer of skills and knowledge appears to be threatened in many sectors of the Textile/Clothing/Leather chain, where initiatives and practices behind processes have seldom been coded.

In addition, the closure of training platforms in many companies due to poor attendance has put their preservation of rare, yet necessary skills at risk.

Various member countries are experimenting with and implementing new courses of action to preserve knowledge and review the geographic distribution of technical training centres which are considerably

TOOL 3: Restructuring the Training Model

COUNTRY: UK
ORGANISATION: Creative Skillset
NAME OF THE PRODUCT: Knitwear Apprenticeship

A group of traditional rivals in Scottish knitwear have formed an unlikely alliance to save their industry from extinction due to a disappearing workforce.

12 companies from Scottish Borders stand to lose the most experienced 10% of their 2,000+ workforce to retirement over the next five years, leaving them with a crippling skills gap. However, that was before there were any established programs to recruit and train new talent.

But now, there is a solution, thanks to a forward-thinking group of employers, who had previously not sat together at the same table for more than two generations. The result was the **Creative Skillset** Modern Apprenticeship program that has been driving the industry to respond to the very specific challenges that it faces.

Led by Robin Deas from the House of Cheviot and Mike Wilson from the Scottish Borders Exporters Association, the knitwear manufacturers have banded together and, with the help of **Creative Skillset** and a collection of educational, trade and governmental bodies, developed an innovative solution to their collective challenge.

Creative Skillset played a strategic role in providing leadership to employers, developing partnerships and approving delivery mechanisms.

TOOL 4: Surveying Knowledgeable Experts and Harnessing Expertise

COUNTRY: France
ORGANISATION: Opcalia TMC
NAME OF THE PRODUCT: Senior Know-how preservation and transfer programprofessionnelle

Most of our companies are small-scale outfits, with specific expertise that enables them to find their niche on global markets. Their main difficulty is keeping this knowledge or "savoir-faire" alive and preserving it before the departure of senior employees.

Since these small-scale companies are also part of the French craft industry, the importance of keeping French savoir-faire within our borders is also political.

Opcalia formerly **FORTHAC**, before a merger with **Opcalia** has long been aware of this crucial issue. 2 experimental programs were developed for the benefit of our company members with the help of French State subsidies. 5 years ago, a preservation program was launched, which consisted in paying experts to develop written or filmed documentation retracing each step of their savoir-faire.

Last year, a training course was developed to the benefit of key employees who would be responsible for transmitting their knowledge to others.

Training expert employees to transfer their savoir-faire

Internal training allows knowledge and savoir-faire to be transferred between associates within the same company.

According to this set-up, the company's permanent and part-time employees provide the training. Internal training responds to economic and human issues within the company, by protecting its interests (manufacturing secrets, sales methods, etc.), and by placing value on the skills of its trained employees and creating a formal connection between its junior and senior staff.

As opposed to paying for the services of a training agency, internal training forces the company to ensure the supervision of training. The company designs the program, and maintains full control over its pedagogical organisation and proceedings.

In order to make this program work, training personnel must possess the technical, professional and theoretical skills associated with the relevant field of expertise and the ability to transfer their knowledge.

TOOL 5: Training Plan for Internal Training Personnel

Ensuring companies are well resourced enough and have the skills internally to ensure the workforce is adequately trained and ensures companies do not have to pay for external training is also a key operation for two of the national partners.

COUNTRY: France
ORGANISATION: Opcalia TMC
NAME OF THE PRODUCT: Cursus Labélisés

In order to respond to the skills mismatch in certain jobs in the TCL sector, social partners have decided to formally approve some of the training sessions. This training has to meet strict specifications defined by the social partners (length of sessions, content of training modules, teaching methods, etc)
This guarantees the quality of the training sessions and the sectors recognition.
These training sessions are devised according to specific needs in the TCL sector.
A specific training session for internal training personnel has been created. It aims is to help employees who must transmit their skills to newcomers. There are several training modules:

Module 1: Analysis of Needs and Resources
Module 2: Training Project Design
Module 3: Planning
Module 4: Preparing Pedagogical Support
Module 5: Training Sessions
Module 6: Evaluation of Training
This training session is financed by **Opcalia TMC**, and upon completion, each employee is awarded a certificate.

COUNTRY: Belgium
ORGANISATION: IVOC
NAME OF THE PRODUCT: Training of teachers

IVOC is prominent in the further **training of teachers** with a number of **IVOC** training programs available. The main topics covered by these training programs include; Styling & Fashion Trends; Textiles raw materials; Pattern drawing; and Ironing.
As part of its training schedule, **IVOC** is offering a specific 3-day training session devoted to internal training. It is free for employees of the clothing and tailoring sector (CP 109 & 215) and for textiles maintenance sector workers (CP 110). The training session is financed with sectoral funds.

Objectives
- Target training program to attain the intended goals
- Be aware of the audience
- Manage a group
- Put pedagogical tools to good use
- Make the presentation interesting

Program
- The 3 roles of the trainer: speaker, host, teacher
- Definition of teaching goals
- Learning conditions for adults
- Active teaching methods and techniques
- Teaching aids
- Resources for working in a group for improved participation
- Comments: how to make them positive?

This program can be adapted to suit more specific requests.

Methodology
Interaction is the essence of our training sessions: practical exercises, debates, role play, analysis of real situations, discussing participants experiences, finding appropriate solutions to problems brought forth by participants, self-evaluation tests.

COUNTRY: UK
ORGANISATION: Creative Skillest
NAME OF THE PRODUCT : Train the trainer events

Creative Skillset have also developed and delivered train the trainer events with industry.

These events which have been well attended encouraging knowledge sharing and ensuring companies have the skills and confidence to train in-house with up-to-date knowledge and techniques.

COUNTRY: France
ORGANISATION: Opcalia TMC
NAME OF THE PRODUCT : Funding for internal training

In France, internal training can be financed by **Opcalia TMC** if it meets certain conditions. Companies must: provide a training program and prove that the internal trainer has the required skills and experience. Furthermore, following the training session, the company must provide signed record sheets and assessment forms to **Opcalia TMC**.

It can be difficult for the company to implement this kind of training. This is the reason that **Opcalia TMC** has published a booklet intended to guide companies in implementing their training sessions.

Improving the recognition of acquired professional skills and certifications

The recognition of acquired professional skills and certifications is a topic that has taken the sector by storm in many countries.

In fact, beyond the system of skills assessment that helps certify an employee's proficiency in his or her functions, activities, or vocation, these mechanisms are increasingly considered to be tools for managing both skills within the company and the quality of employee/employer relations.

First, these systems can be used by businesses to praise the work of "staff that deserve it". They aim to provide social recognition to certain employees who participate, for example, in the company's success or increase their motivation and personal investment.

They can also be used as support for employees along their career paths within the company. In this case, they can also serve in some cases as an HR management tool.

In some cases, these tools can help support employees' professional development and to update their skills. In this case, it is a career, such as that of line operator that is targeted. If the process itself provides no new knowledge, it renders the employee's implicit practices explicit.

Using these tools is part of the reconfiguration of positions and functions. This process legitimizes the choices made within the company, and reinforces the position of supervisors and line operators who have worked for the company for many years and progressed from within, without ever having their skills officially certified.

Certification can contribute to strengthening the competitive position of the company by enabling it to participate in certain international tenders, to conquer new markets, and reinforce its brand image with clients, other businesses, partners, employees and external job-seekers.

Finally, certification can be used as a mobilisation strategy, in order to develop employees' job readiness. This involves distinguishing internal job readiness within a group from external job readiness, in the context of restructuring or a site-closing. skills associated with the relevant field of expertise and the ability to transfer their knowledge.

TOOL 6: Validation of professional achievement

COUNTRY: France
ORGANISATION: Opcalia TMC
NAME OF THE PRODUCT: Professional Qualification

A common theme within the TCL sector is that whilst the workforce is highly skilled, many within the workforce are without formal qualifications. This both hinders future employability and does not recognise their significant work achievements.

To overcome this, OPCALIA have developed their own system of validating professional achievement that recognise experienced workers within the TCL sector and the skills required to undertake the role without formal qualifications.

In France, professional organisations and branches have been able to create professional qualification certificates for their workforces which are equivalent to diploma status. There aims of these awards are to validate a level of professional achievement and increase their employability; equip workers with the skills required for the certificate and allow companies to draw up their own individualised training schedule according to employee level.

Workers are tested through producing a short resume of their experience, job shadowing, knowledge tests and a technical interview which allows an assessment to be made and an understanding of the skills acquired and the skills to be acquired. This therefore allows both assessments for certification to be undertaken but also understand what training needs the workforce has.

Within the TCL sector, there are nine different CQP (branch qualification certificates) that have been developed which have seen 5,000 workers attain these within the six years of the scheme. There are also CQPI (Inter-branch Certificates) which are certificates which are of more generic nature and therefore apply to occupations across all sectors. To date, 3,300 have been awarded within the TCL sector.

COUNTRY: Belgium
ORGANISATION: IVOC
NAME OF THE PRODUCT: Standards and tests for the professionals

Since 2007, IVOC has contributed to the development of standards and tests for the professions of stitcher, ironer and pattern designers.

On the basis of these standards, candidates who pass a test can be granted a certificate of experience (equivalent to an academic degree). These are developed with various external partners and experts. IVOC is also the developer, broker and provider of these services

5. CONCLUSIONS AND RECOMMENDATIONS

The TCL sector has strongly faced the employment and training issues to which it is confronted in the different countries. The social partners have managed to demonstrate their creativity and engagement to deploy adapted tools and methodologies that have proven their effectiveness.

The results of development work and the undertakings of the various TCL bodies has had the impact of ensuring products are developed that ultimately fit for purpose and improve the skills of the workforce, ensuring firm productivity.

In this theme of "Tools and methodologies development" ISP can assign several goals:

- use the multiplier effect of numerous national observatories to bid for development activities on a Pan-European basis that complements and strengthens on-going national level initiatives
- understand 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 ?

1.To clarify on the potential intervention of Europe and of the social partners
2. To Find points of comparison between the projects proponents
3. 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:

1. Propose a list of projects (in the form of project sheets)
2. Evaluate these projects In light of the selected criteria (territorial representation, impacts, cost, evaluation, implementation rate, sustainability of measures…)
3. Valorisation of ongoing projects (communication, development of guides)

Condition of success

> The obligation to associate each best practices 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 labeling scheme for quality training in the TCL 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 valorising long experienced and high specialisation workers tutors and trainers of new incoming workforce.

European Skills Council
Textile Clothing Leather

Report #4

Recommendations of the Skills Council

This report has been elaborated
with the support of the European Commission

0. SUMMARY

1. INTRODUCTION TO THE REPORT

The European TCL Sector Skills Council for employment and training (TCL ESSC) considers the present report as the most important of the 4 produced during the first year of its functioning. 3 research reports have been produced by an intense interaction among the Industrial Skills Partnerships (ISPs) members of the TCL ESSC on:

- The evolution of the supply, employment and skills needs including foresight and forecast analyses for the sector
- The good practices bringing the worlds of education and work closer and reducing the persistent skills mismatch at sectoral level, as well as on the mechanisms existing at national or regional level between anticipation bodies and education and training providers
- Innovative tools, national and/or regional strategies, local initiatives, methods put in place by members of the council for peer learning purposes.

These have been delivering to the ESSC updated sectoral intelligence, which has been used to feed the strategic proposals of the Social Partners, included in this fourth Report, taking also into proper consideration the evolution of the economic conditions of the sector and up to date information coming from their members.

The importance of the report lies in its strategic potential to orientate actions and programmes needed by the TCL sector.

In order to achieve the required effectiveness, the Skills council has decided to create the set of recommendations following a logical structure that groups short and clear stakeholders specific indications referring to its mission.

The ESSC considers moreover very important that the recommendations provided will also represent the framework for implementation of prioritised actions during the following years of activities. Stakeholders identified, as recipients of the recommendations are:

- European commission
- National Social partners
- National ISPs
- National public authorities involved with education and training
- Vocational and continuous training providers

The Skills council has issued a set of 7 recommendations, each of which has been addressed to a main stakeholder and to other actors, which are asked to provide specific support actions for the actual implementation of the recommendations.

The overall objective of this action is to provide the industry, trough the ESSC, 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.

2. THE EUROPEAN TCL SECTOR

From an industrial manufacturing point of view, the Textile, Clothing and Leather sector is a SME intensive aggregation of production categories, composed of the following subsectors :

It is evident how the European Textile Clothing and Leather Sectors embodies several value chains, essential for the European economy.

It accounts for over 2.5 million direct jobs in 230,000 businesses, representing 4% of total production and 7% of jobs in European manufacturing. TCL generates a turnover of more than 210 billion Euros in the EU.

Relevant market and social evolutions create a challenging scenario for the development of the European TCL Industries. Radical changes in product and processes, shifts in consumer behaviour, global competition, restructuring of traditional value chains, ageing of the workforce, the skills gap are some of the daily issues our sector's companies have to face.

NACE	DENOMINATION
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

3. OUTCOMES OF THE WORK

During the year 2012, the activities of the ESSC strongly focused on the aggregation of state of the art knowledge referred to the sector.

As anticipated in the introduction, 3 specific reports have been produced, in order to feed the social partners (forming the board of the council itself), with the required information, necessary to outline suggestions to different stakeholders, for helping the sector solve its problems, but also helping Europe exploiting the opportunities offered by the Sector.

The logical structure of the activity is represented in the following figure.

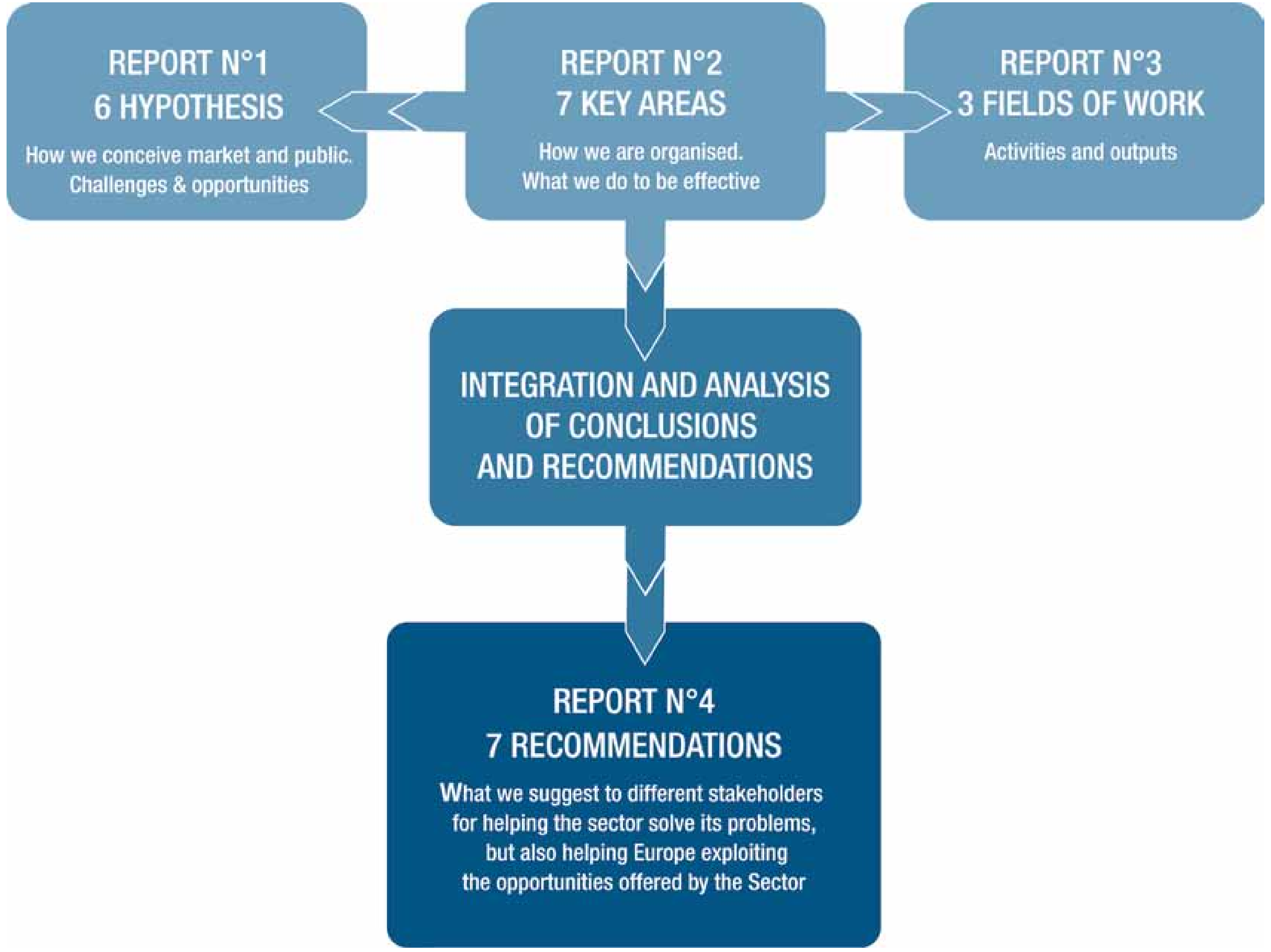


Fig.1: Logical structure of the work

3.1. Logical structure of the recommendations

In order to be effective, recommendations of the ESSC must fulfil several requirements:

- They must lye within the mission of the ESSC
- They must be clear and unambiguous
- They must be stakeholder specific
- They must represent the framework for implementation of prioritised actions

Objectives and mission of the TCL Skills council are herewith presented:

Art. 3 Objective

EU TCL SKILLS COUNCIL aims at improving the qualifications of the European labour force of our Industries, and to assist enterprises to be more flexible in meeting changing competitive demands.

By bringing together corporate executives, owner-operators of smaller firms, employees, union leaders, educators, bi-partite and tri-partite organizations dealing with education and development, and interested government representatives, our EU TCL SKILLS COUNCIL aims at addressing a wide range of issues related to 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 mission of the EU TCL SKILLS COUNCIL is:

3.1. To monitor and contribute to the active networking/ information exchange of the involved sectoral national observatories and/or the respective social partners at European level regarding Education Training and Employment of the Textile Clothing and Leather (hereafter called "TCL") Industries;

3.2. To carry out reports/surveys/analyses to construct and maintain the interaction with the reference market related to Education Training and Employment of the TCL Industries;

3.3. To foster alliances within the TCL Industries and also with related sectors (e.g. machinery manufacturers, chemical industry, distribution, etcetera.) in order to maximise synergies with them;

3.4. To develop and promote an effective innovation policy, in keeping with sustainability and flexibility, to include technical research, technology transfers, vocational training, etc;

3.5. 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 TCL Industries;

3.6. To provide the members with relevant information in Education Training and Employment of the TCL Industries in order to facilitate decision-making;

On the other hand, stakeholders that may be the recipients of the recommendations defined are:

- European Commission
- National Social Partners
- National ISPs
- National Public Authorities involved with education and training
- Vocational and Continuous Training providers

Each of the 3 reports described above, has produced specific updated sectoral intelligence on challenges to be faced and opportunities to be exploited by the TCL sector in the field of employment and training.

The reports have been discussed several times during the year, allowing the social partners to develop a deep understanding of the different issues identified.

These challenges and opportunities have been cross-linked with the statutory objectives of the ESSC, both to verify their appropriateness and to make sure the ESSC was not addressing issues that are beyond its scope.

For each of the links identified, the Board of the Council has identified a priority action that has been carefully described in a Recommendation addressed to one or more main stakeholders.

At the same time, other specific support actions, that need to be implemented for the concrete realisation of the objectives set with the recommendations have been identified and addressed to other stakeholders.

Within this framework, it has been possible for social partners and other ESSC members to agree on general principles guiding the work plan of the second year of activities of the ESSC. The logical structure described above is represented in figure n° 2.

Fig. 2: Logical structure of the recommendations

In the following paragraphs, the set of 7 agreed Recommendations and 13 Support Actions is described in detail.

3.2. Recommendations and Specific Support Actions

3.2.1 Recommendation n°1

COHERENCE WITH ESSC MISSION:

3.1.

To monitor and contribute to the active networking/ information exchange of the involved sectoral national observatories and/or the respective social partners at European level regarding Education Training and Employment of the Textile Clothing and Leather Industries;

MAIN STAKEHOLDER ADDRESSED:

European Commission

RECOMMENDATION:

To support the TCL ESSC trough adequate resources, while keeping its autonomy, to succeed its goal to become a fundamental tool of good governance in VCT, initial education and employment in the sector.

SUPPORTING ACTIONS FROM OTHER STAKEHOLDERS:

STAKEHOLDER	DESCRIPTION OF THE SUPPORTING ACTION
NATIONAL SOCIAL PARTNERS	To support their national ISPs (where existing) or to evaluate the opportunity to set up such national or regional ISPs, taking into consideration the potential advantages of being members of the ESSC. Social Partners may also support the enlargement of the TCL ESSC Network to any relevant stakeholder active in the TCL industries.
NATIONAL PUBLIC AUTHORITIES	To favour the creation of National ISPs, facilitating the conditions for their access to the TCL ESSC, also trough specific financial support.
VCT PROVIDERS	To access and feed the ESSC network.

3.2.2 Recommendation n°2

COHERENCE WITH ESSC MISSION:

3.2.

To carry out reports/surveys/analyses to construct and maintain the interaction with the reference market related to Education Training and Employment of the TCL Industries;

3.6.

To provide the members with relevant information in Education Training and Employment of the TCL Industries in order to facilitate decision-making;

MAIN STAKEHOLDER ADDRESSED:

National ISPs

RECOMMENDATION:

To implement and develop national networks, aiming at favouring an efficient system to collect and elaborate reliable data and information.

SUPPORTING ACTIONS FROM OTHER STAKEHOLDERS:

STAKEHOLDER	DESCRIPTION OF THE SUPPORTING ACTION
EUROPEAN COMMISSION	Towards this goal, the TCL ESSC recommends to develop, in cooperation with the Commission a dashboard of essential sector relevant, effective and clear indicators, in order to monitor the evolution of the sector in terms of skills needs and employment trends. This monitoring should serve to better orientate policies and actions for anticipating future needs on skills and employment.
NATIONAL PUBLIC AUTHORITIES	To facilitate the generation of required data in the area of skills and employment, either by the provision of existing intelligence from official statistical sources or by financially supporting surveys carried out by sectorial social partners and/or ISPs.

3.2.3 Recommendation n°3

COHERENCE WITH ESSC MISSION:

3.3.

To foster alliances within the TCL Industries and also with related sectors (e.g. machinery manufacturers, chemical industry, distribution, etcetera.) in order to maximise synergies with them;

MAIN STAKEHOLDER ADDRESSED:

European Commission

RECOMMENDATION:

To support the implementation of inter-sectoral and transnational projects and working groups, linking innovation to skills development and evolution of the labour market.

SUPPORTING ACTIONS FROM OTHER STAKEHOLDERS:

STAKEHOLDER	DESCRIPTION OF THE SUPPORTING ACTION
NATIONAL SOCIAL PARTNERS	To encourage increased interest of companies and workers in integrating new and evolved skills management in their innovation, internationalisation and other relevant business strategies.
NATIONAL ISPs	To interact with other national stakeholders (in particular VCT providers) in order to fill the skills and competencies gaps generated by the initiation or implementation of innovation, internationalisation or other relevant new business strategies.

3.2.4 Recommendation n°4

COHERENCE WITH ESSC MISSION:

3.4.

To develop and promote an effective innovation policy, in keeping with sustainability and flexibility, to include technical research, technology transfers, vocational training, etc;

MAIN STAKEHOLDER ADDRESSED:

European Commission

RECOMMENDATION:

To use the ESSC as a facilitator to a transversal approach across the Commission services regarding the issues of skills, competences and labour market at sectoral level, in coherence with implementing policies stemming from the EU flagship initiatives.

NO SUPPORTING ACTIONS FROM OTHER STAKEHOLDERS ARE FORESEEN FOR THIS RECOMMENDATION.

3.2.5 Recommendation n°5

COHERENCE WITH ESSC MISSION:

3.5.

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 TCL Industries;

MAIN STAKEHOLDER ADDRESSED:

European Commission
National Public Authorities

RECOMMENDATION:

To support the implementation of communication strategies toward the new generations, aiming at attracting new skilled workers to the industry.

SUPPORTING ACTIONS FROM OTHER STAKEHOLDERS:

STAKEHOLDER	DESCRIPTION OF THE SUPPORTING ACTION
NATIONAL SOCIAL PARTNERS	Develop communication and awareness raising actions towards general public and students of all ages and profiles, informing them on the economical, structural and innovation based characteristics of the TCL industries and on the career opportunities linked therein.
NATIONAL ISPs	Cooperate on image building strategies of the TCL industries, developing ESSC labelled and quality ensured training pathways, guaranteeing up-to-date skills and competences needed in the industries.

3.2.6 Recommendation n°6

COHERENCE WITH ESSC MISSION:

3.6.

To provide the members with relevant information in Education Training and Employment of the TCL Industries in order to facilitate decision-making;

MAIN STAKEHOLDER ADDRESSED:

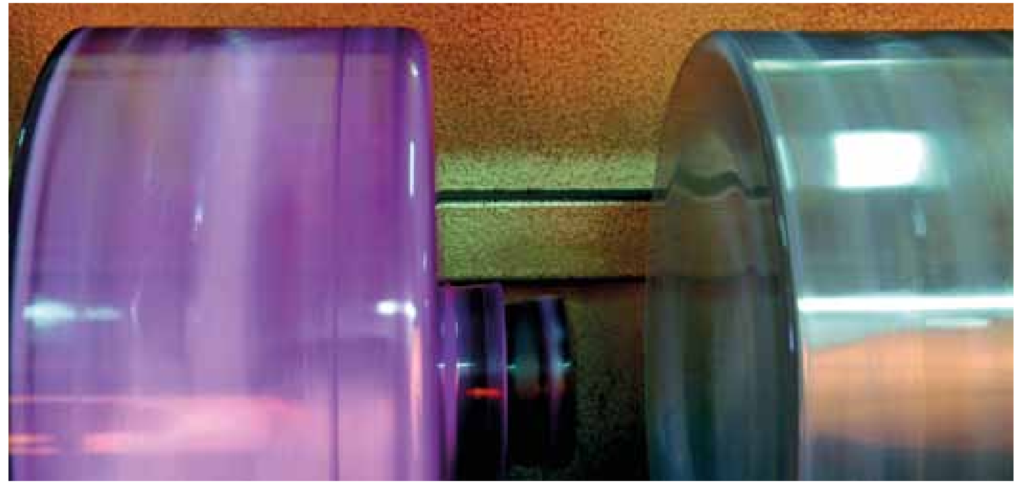
VCT Providers

RECOMMENDATION:

To fully exploit the ESSC, in order to orientate their training offer and to create a model of excellence in sectoral training.

NO SUPPORTING ACTIONS FROM OTHER STAKEHOLDERS ARE FORESEEN FOR THIS RECOMMENDATION.

3.2.7 Recommendation n°7



COHERENCE WITH ESSC MISSION:

3.7.

To carry out all activities which may generally contribute to the achievement of the objectives of a supranational nature set out in the paragraphs above.

MAIN STAKEHOLDER ADDRESSED:

European Commission
National Social Partners
National Isps
National Public Authorities
Vet Providers

RECOMMENDATION:

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.

SUPPORTING ACTIONS FROM OTHER STAKEHOLDERS:

STAKEHOLDER	DESCRIPTION OF THE SUPPORTING ACTION
EUROPEAN COMMISSION	Develop and support and promote the concept of Life Long Learning.
NATIONAL SOCIAL PARTNERS	Discuss and implement Life Long Learning measures in companies & promote the concept among companies and employees.
NATIONAL ISPs	Organise and guide programs on Life Long Learning.

4. CONCLUSIONS

The ESSC considers the implementation of the high-level action plan represented by the set of these stakeholder specific recommendations, as a very important result of its first year of functioning.

It will allow Social partners and ISPs members of the Council orientating their strategic activities in the future, addressing the most important issues referring to employment and training with the cooperation of the different actors that are able to support the overall objectives defined.

The concrete implementation of actions will allow the European TCL sector:

- to fully exploit the ESSC, as a fundamental tool of good governance in VCT, initial education and employment
- to base its strategic decisions on updated and reliable data, collected in an efficient manner
- to develop a Europe-wide strategy on skills and employment, continuously tackling the persistent problem skills mismatch
- to attract new and young skilled workers
- to create a model of excellence in sectoral VCT
- to increase the internal and external employability of their skilled employees.

During the first year of activities, Social Partners and ISPs have already identified a set of 82 possible actions to be implemented in coherence with the high level objectives set herewith.

Moreover, the work programme of the next year of activities, already agreed by Council members is fully in line with the high level action plan described in the present report.

5. REFERENCES

- ESSC 2012 Report n° 1: The evolution of the supply, employment and skills needs including foresight and forecast analyses for the sector
- ESSC 2012 Report n° 2: Good practices bringing the worlds of education and work closer and reducing the persistent skills mismatch at sectoral level, as well as on the mechanisms existing at national or regional level between anticipation bodies and education and training providers
- ESSC 2012 Report n° 3: Innovative tools, national and/or regional strategies, local initiatives, methods put in place for peer learning purposes

European Skills Council
Textile Clothing Leather