

ADVANCING AT FULL STEAM: A Skills Strategy for the TCLF sectors and the development of eight curricula

NEWS N. 3 – JULY 2019

THE S4TCLF PARTNERSHIP MEETS IN ATHENS



S4TCLF partnership in Athens, 11 June 2019

With the 4th Technical meeting held in sunny Athens last 11th June and hosted by our Greek partner HMA (Hellenic Management Association), we are now getting to the very heart of the S4TCLF project.

A year and a half after the kick off meeting in Brussels, project partners are now a tight-knit team involved in many activities: developing different scenarios for a sectoral skills strategy (WP5), validating the curricula of 8 occupational profiles through focus groups with sectoral experts (WP3) and developing the content of 8 online tools (MOOCs) that will be linked to each of the identified occupations (WP7). In order to upgrade the image of careers in the TCLF sectors, the S4TCLF team is currently mapping best practices on employment and recruitment practice across Europe, drafting an Attractiveness Plan for the TCLF sectors and setting the path for the creation

of a European Fashion Campus. This Campus has the ambition to become a hub for knowledge-sharing and vocational training. It intends to boost innovation uptake, stimulate economic growth, and enable SMEs to scale-up. The European Fashion Campus will also foster transnational collaborations.

All partners agree that the success of this project will be commensurated with the ownership taken by sectoral stakeholders. In this respect, the full involvement of private and public stakeholders (companies, social partners, VET providers, universities, technological centres, schools, public authorities, and ordinary citizens) in the projects' activities is as much important as essential. Main activities and outcomes will continue to be discussed openly and on an on-going basis with interested parties, including in the context of sectoral social dialogue committees, as was the case on 9th July 2019 during the Joint Meeting Tanning/Leather, Footwear, Textile & Clothing and IndustriAll Europe held in Brussels.



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A SECTORAL SKILLS STRATEGY FOR THE TCLF INDUSTRY: DIFFERENT SCENARIOS

After months of joined efforts, project partners are proud to present the first draft of the Sectoral Skills Strategy for the Textile, Clothing, Leather and Footwear Industry for 2030. The document plays an important role in the overall project and aims to estimate future jobs and skills needs based on a detailed analysis of the current situation and different future industry development scenarios.

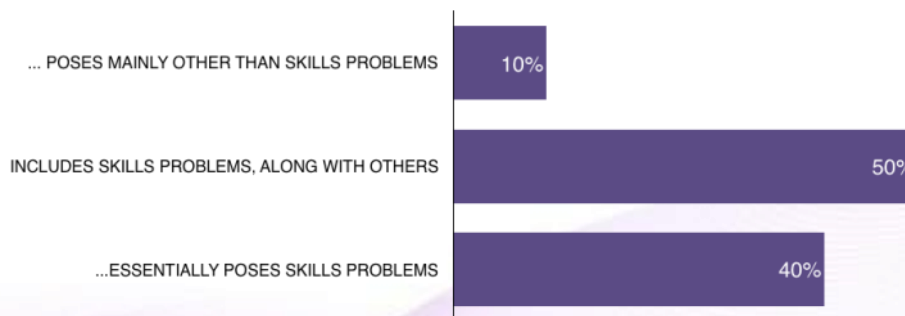
On the basis of this strategy framework countries and regions can produce customised forecasts to help identify concrete actions to best match demand and supply of skilled workforce for the industry.

To identify the required actions and milestones, project partners based their research on primary as well as secondary research material. The first

crucial inputs stemmed from an on-site survey that project partners conducted last year among more than 200 companies across Europe. This survey focused on current and estimated future jobs needs, analysed businesses' demand for specific occupations and tried to understand how the changes affecting the nature of certain occupations is impacting skills requirements. On that question, the majority of respondents agree that these changes create skills-related problems. Secondly, data used as input were provided by EUROSTAT, the European Commission and Parliament, CEDEFOP among other European Organizations, followed by input provided in the activities of international organizations, and private companies.

Figure 1. Skills strategy: the nature of changes in the occupations

THE NATURE OF CHANGES IN THE OCCUPATION...



The partners have also identified the main drivers of change affecting the TCLF sectors. From these drivers of change, the partners have derived five distinct scenarios that could impact the future of the TCLF sectors by 2030.

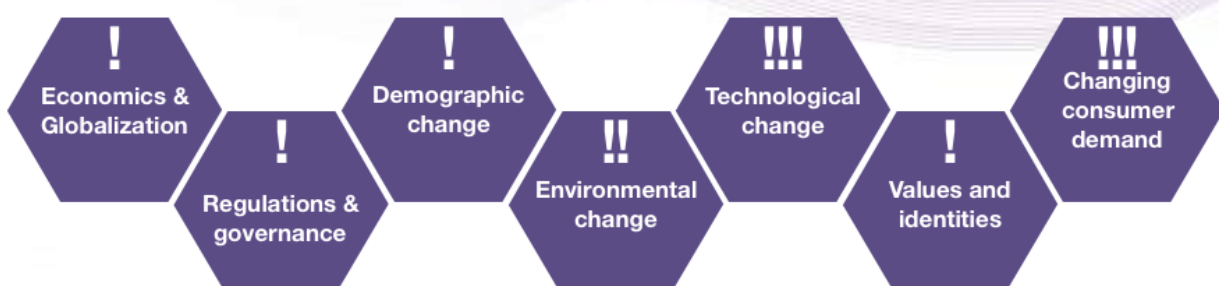
The main elements of the TCLF strategy focuses on three main pillars - political, industrial and educational. To ensure more effective measures, the strategy will be established on two levels - the European level followed by the national level based on the unique experience and knowledge of the project partners. The final EU and national level strategies will be presented by the end of

the project in 2021.

The main drivers of change influencing the industry are related to the following fields:

- Economics and globalization,
- Regulations and governance,
- Demographic change,
- Environmental change,
- Technological change,
- Values and identities,
- Changing consumer demand.

Figure 2. Main drivers of change



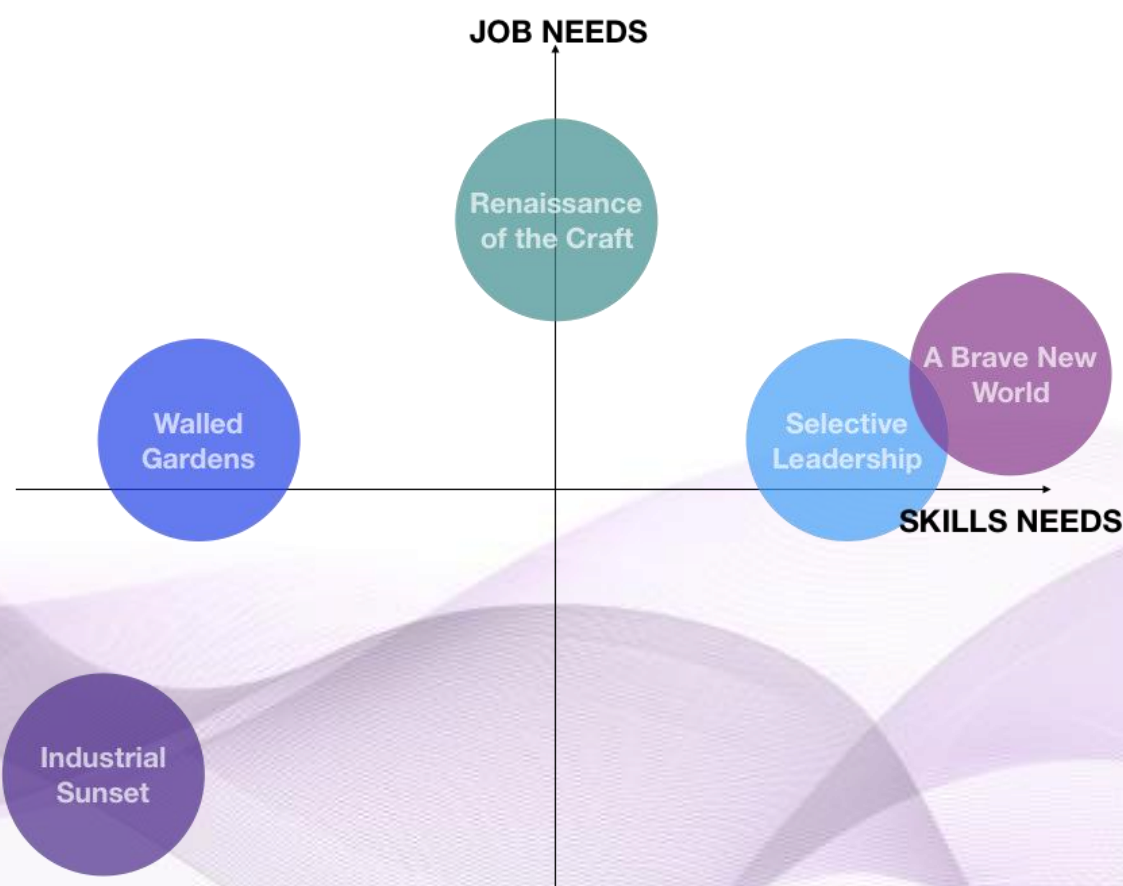
These drivers of change, which were presented for the first time in the 2014 EU TCLF Skills Council Report have been updated based on the conclusions drawn by the industry survey. Thanks to this, project partners established the hierarchy of the input on the production side of the industry. The two drivers of change with the strongest influence on production are technological changes and a changing consumer demand.

Additionally, an ever-increasing interest from consumers in sustainable and eco-friendly prod-

ucts has led to a need for readjustments in the production possibilities are still very narrow.

After analysing gathered data and results, project partners took the first steps towards establishing a Sectoral Skills Strategy by creating five distinctive scenarios for the future of the industry. These scenarios illustrate the hypothetic future of the whole TCLF industry in Europe, although the impact of these scenarios can vary depending on the specific sector or country.

Figure 3. Five possible scenarios for a TCLF Skills Strategy



The most optimistic scenario - **A Brave New World** - highlights the impact of technological progress on the production process of the TCLF sectors. These technological advances can close the gap between traditional and other more digitised and automated manufacturing sectors.

The next scenario - **Selective Leadership** - also highlights the impact of technological change but focuses also on the positive influence of political regulations and international trade, which may help certain TCLF branches like higher added value premium or technologically advanced prod-

ucts more than the lower tech, lower added-value branches of the industry.

The **Renaissance of the Craft** scenario focuses on greater valorization of the craft, skills, and unique European heritage. Although it is an ideal scenario in comparison with the current situation, on a smaller scale it has a chance to grow and by that should not be ignored.

The **Walled Gardens** scenario illustrates an approach leaning toward regional preference and protectionism. The realisation of this scenario depends on the existence of political or regulato-

ry barriers to international competition based on cost advantages that can maintain significant workforce and production facilities in the traditional TCLF production clusters in Europe.

The last and the least optimistic scenario in terms of production and employment - **Industrial Sunset** - forecasts an accelerated outsourcing of the TCLF manufacturing outside Europe while consumption growth mainly takes place in the lower cost and fast-fashion parts of the market.

REVIEWING CURRICULA OF THE 8 MOST NEEDED TCLF OCCUPATIONS

Because of changing labour market needs, skills intelligence is crucial to reform and design education and training programmes that will stand the test of time. Revising and creating new/ updated occupational profiles and the corresponding skills, drawing on from the classification of European Skills, Competences, Qualifications and Occupations (ESCO) and existing competence frameworks and updating or designing new curricula are the main ongoing activities of WP7, led by Gheorghe Asachi Technical University of Iași (TUIASI). Thanks to the outcomes of the survey to 225 TCLF companies and the domain expertise of the S4TCLF partnership, 8 occupations have been identified that are both in high demand from European TCLF companies and in need of a curriculum refreshment. Among these professional profiles, four are **sectoral**:

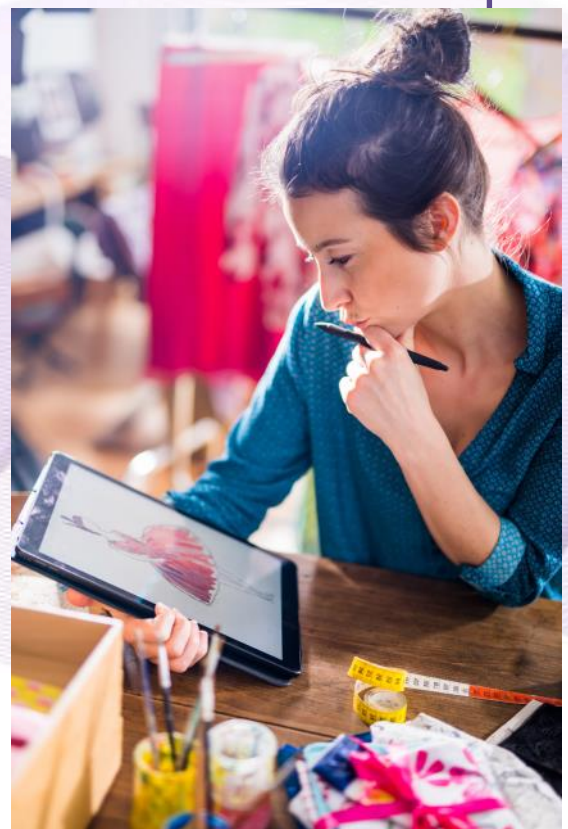
- Clothing CAD Pattern Maker,
- Textile Technologist,
- Leather Technologist,
- Footwear 3D CAD Designer & Pattern Maker

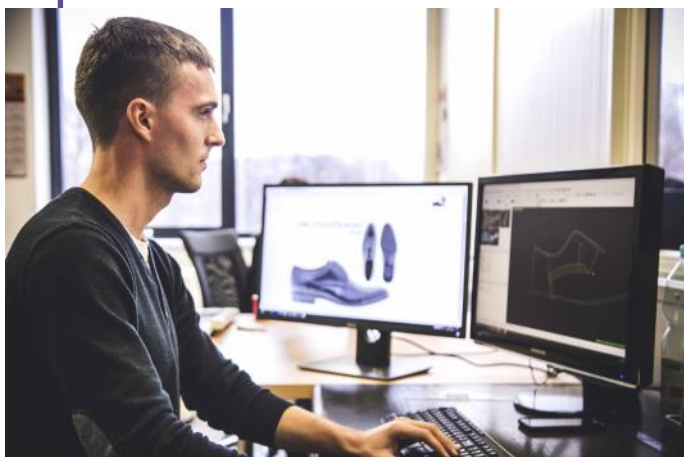
In summary, all these scenarios have certain things in common as well as certain things that make them distinctive from each other. Jobs and skills needs across these possible futures may vary significantly. Based on the sectoral stakeholders best assessment of the likelihood of one or several scenarios to be playing out in the coming years, appropriate strategies and anticipative actions at regional, national or European level can be taken to ensure the best possible preparation of TCLF companies and their employees for what is to come.

and four are **transversal** applying to all 4 sub-sectors:

- (Digital) Supply Chain Analyst,
- Sustainability Technician,
- Digital Marketing Professional,
- Process & Production Timeline Analyst

Focus groups and interviews with VET providers, lecturers or sectoral experts have been organised throughout the month of June and July 2019 in the 9 participating countries in order to validate these 8 new or updated occupational profiles.





CLOTHING CAD PATTERN MAKER

He/she designs, evaluates, adjusts and modifies patterns, cutting plans and technical files for all kinds of wearing apparel using CAD systems, acting as interfaces with digital printing, cutting and assembly operations. They are aware of the technical requirements on quality, manufacturability and cost assessment. He/she supports the entire prototyping/sampling process within the clothing company and is able to understand and to transform the design specifications into technical requirements for manufacturing.

TEXTILE TECHNOLOGIST

He/she is in charge of the optimisation of both traditional and innovative textile manufacturing systems management, and in charge of developing products and spinning, weaving, knitting and finishing. He/she has skills and knowledge related to both the mechanical processing of fibres/filaments into yarns and manufacturing of all types of textile products. The Textile Technologist also possesses scientific knowledge about the structure and properties of raw materials and textile products. He/she provides solutions to increase the efficiency throughout the entire production cycle and has a deep understanding of production problems and how to solve them.

LEATHER TECHNOLOGIST

He/she is responsible for the technical management of all production departments within a tannery, from the selection of the raw materials to tanning, retanning and finishing leather according to the specifications given. He/she secures leather quality, evaluate its fitness for use and ensures process and product sustainability. This professional may be responsible for innovation in an organisation, in terms of systems, processes and products. Working in a tannery implies sound relationships with all departments across the business and with the customers.

FOOTWEAR 3D CAD DESIGNER & PATTERN MAKER

He/she designs, adjusts and modifies patterns for all kinds of footwear using CAD systems, working as interface team between design and production teams. He/she transforms the designer's specifications from the digital lasts into technical requirements, updates footwear concepts to manufacturing lines. His/her main activities are on footwear pattern engineering, which may include: selecting/designing lasts and footwear components, selecting materials, designing and making patterns for uppers, linings and bottom components, producing technical drawings for various ranges of tools. He/she collaborates in the prototyping/sampling process, and is able to grade, produce and test the sizing samples.

(DIGITAL) SUPPLY CHAIN ANALYST (TCLF)

He/she conducts data gathering and analysis and provides solutions to cut costs and to increase the efficiency throughout the entire product life cycle within the TCLF companies. His/her responsibility is to improve supply chain operations in relation to sourcing and procurement of raw materials, their traceability, movement of supplies inside the manufacturing stages and delivering the goods to the final parties including end consumers or retailers.

SUSTAINABILITY TECHNICIAN

He/she is responsible for anticipating and identifying social, environmental and economic risks in order to propose and implement plans and measures ensuring that TCLF manufacturing processes and products comply with given public and private standards and legislation on labour and environmental issues, health & safety regulations and social responsibility. He/she is able to monitor and improve the environmental and social impacts according to both the company's business strategy and client requirements.

DIGITAL MARKETING PROFESSIONAL

He/she has knowledge of e-commerce, digital marketing, social media, management and online sales methods, bank payments and other activities related to the electronic trade in TCLF products. He/she helps enhance brand value and brand awareness. He/she gets valuable insights by conducting marketing research and he/she ensures customer satisfaction by forming long-term relationships with customers.

PROCESS & PRODUCTION TIMELINE ANALYST

He/she is responsible for gathering, elaborating, storing, using and sharing digital process data in reference to compliance to customers' requirements, process performance, including technical sheets and production instructions, duration, energy efficiency, as well as production and machinery maintenance. He/she analyses and applies method and time studies on manufacturing operations and tasks, in order to provide solutions for optimising the production process in a TCLF company.



CONSORTIUM PARTNERS & CONTACTS:

info@s4tclfbblueprint.eu
s4tclfbblueprint.eu
[@skills4tclf](https://twitter.com/skills4tclf)
[Skills4SmartTCLF](https://www.facebook.com/Skills4SmartTCLF)

Erasmus +
 Cooperation for innovation and the exchange of good practices
 Sectoral Skills Alliance for implementing a new strategic approach "Blueprint" to sectoral cooperation on skills (Key Action 2, Lot 3)
 Project number: 591986-EPP-1-2017-1-BE-EPPKA2-SSA-B.

"The European Commission support for the production of this publication does not constitute an endorsement of the contents which reflects the views only of the authors, and the Commission cannot be held responsible for any use which may be made of the information contained therein."

Co-funded by the
 Erasmus+ Programme
 of the European Union