



THE CHALLENGES FOR THE TCLF SECTORS

- HOW THE FUTURE WILL LOOK LIKE?

Skills  Smart
TCLF 2030



EURATEX

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THE SKILLS4SMART TCLF PROJECT IN FIGURES



THE PROJECT OBJECTIVES



- Update the training and curricula offer to respond to the mismatch between industry needs & training offer
- Develop a common EU-wide Sectoral Skills Strategy supported by public and private actors across Europe
- Upgrade the image of careers in the TCLF sectors to attract new workers (especially youngsters)

CURRENT TLCF CHALLENGES

1. AGING WORKFORCE

In 2020, **36%** of the TLCF workforce was **over 50**.
(a 2% increase compared to 2019)

2. GREEN AND DIGITAL SKILLS SUPPLY/DEMAND

61% of the companies are in need of **digital skills**.
40% of companies have a **green skills** gap.



3. COVID-19 IMPACT

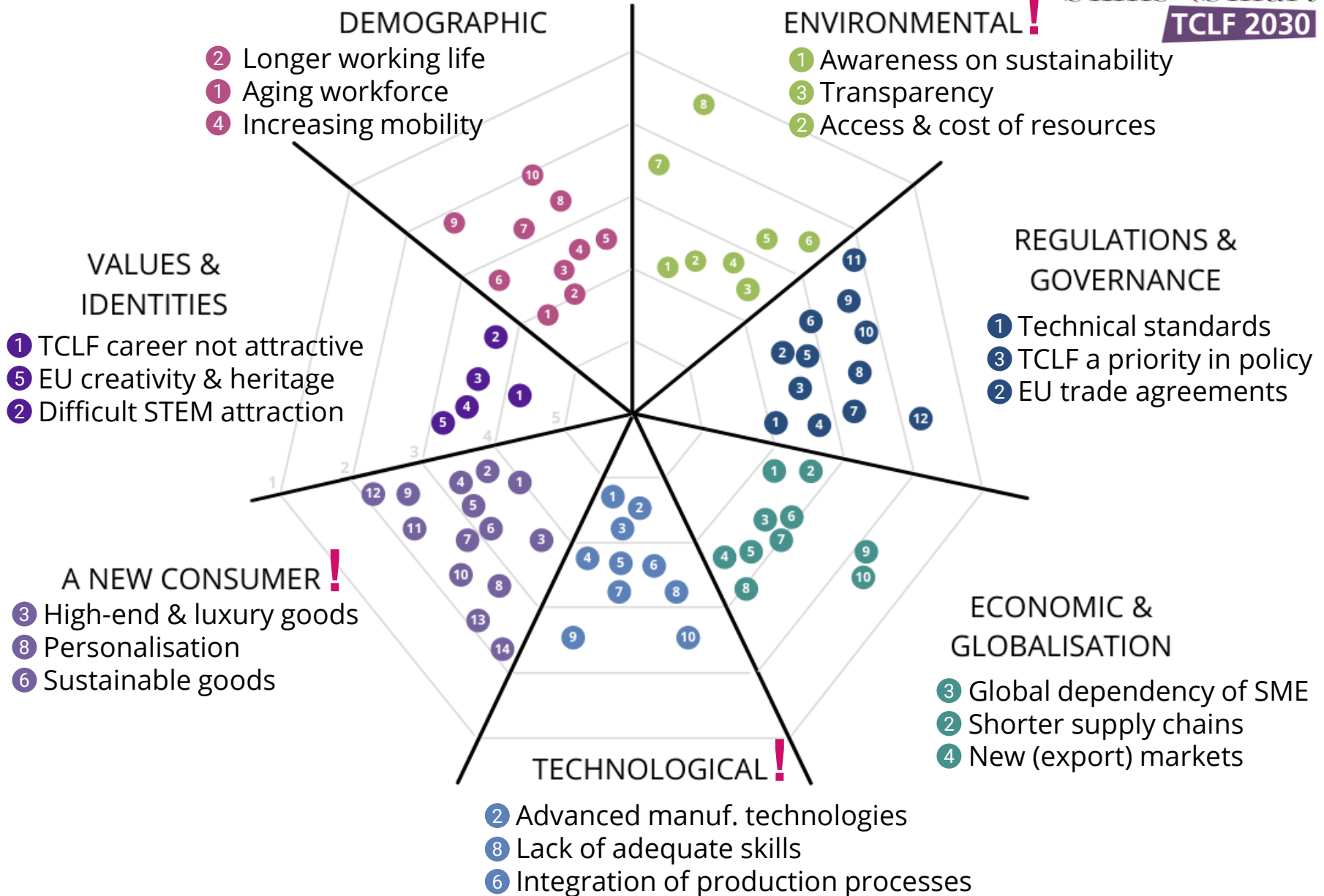
In 2020, turnover dropped by **10%** in textiles, **17%** in clothing and by nearly **25%** in TLCF retail sales.

1. EUROSTAT, 2021

2. EURATEX, CEC, COTANCE, *Towards the Pact for Skills for the TLCF industries – Survey with Companies*, 2021

3. EURATEX, 2020

FUTURE TCLF CHALLENGES IN ITALY



JOB AND SKILLS NEEDS IN THE FUTURE

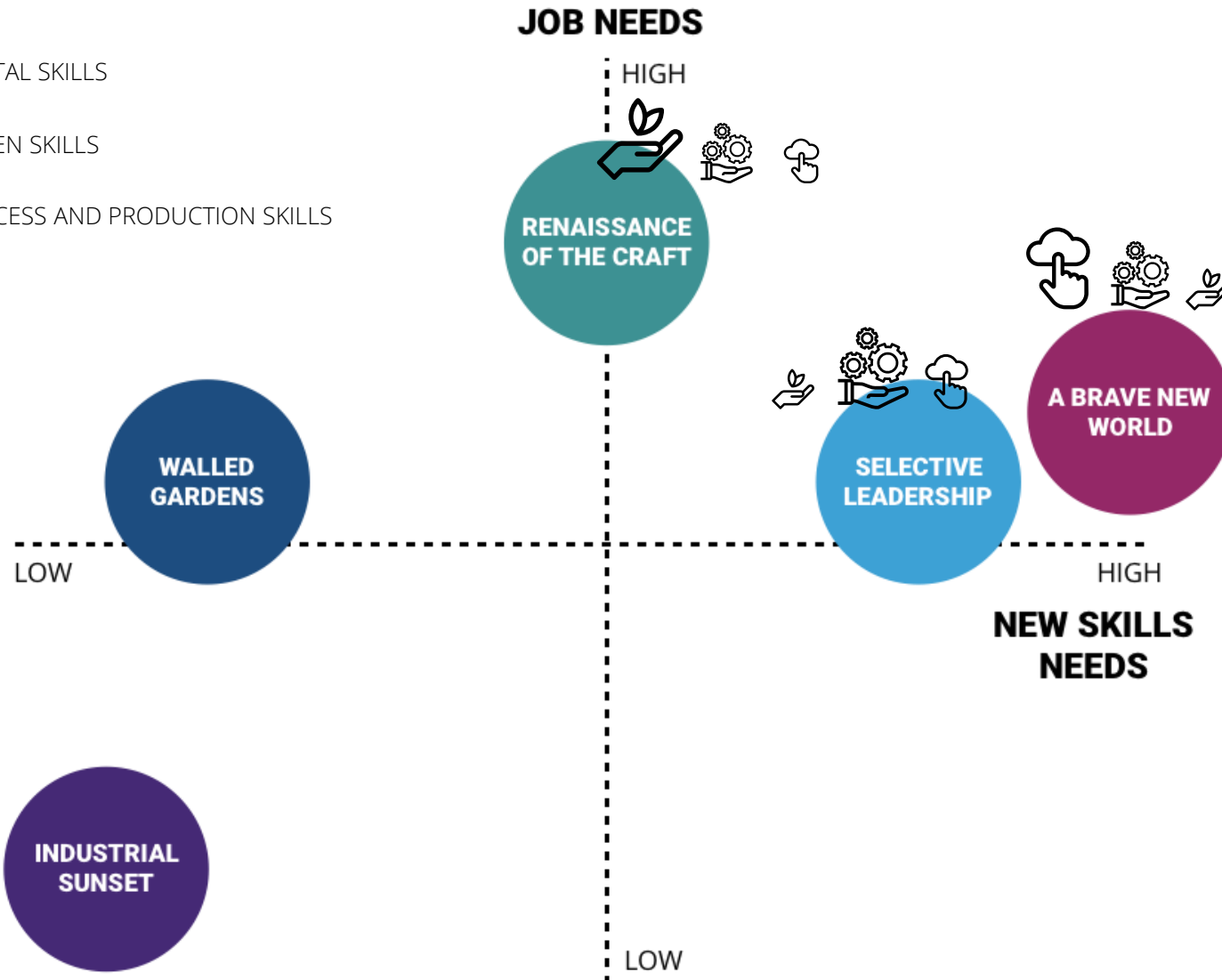
according to the 5 possible scenarios

LEGEND:

 - DIGITAL SKILLS

 - GREEN SKILLS

 - PROCESS AND PRODUCTION SKILLS



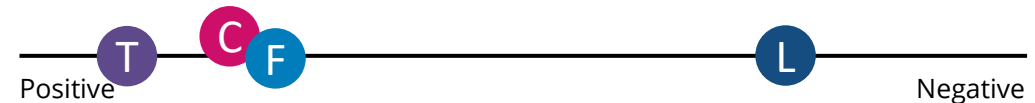
A BRAVE NEW WORLD

- EU PERSPECTIVE

Job situation for A Brave New World scenario based on ISCO clarification

Rapid adoption of advanced digital manufacturing technologies and new business models completely transform the global competitive landscape of the TCLF sector.

Character of impact for the TCLF industries



Production focus

Higher added value and more advanced technologically products or in progress regarding the automatization of production or R&D in other subsectors.

Main drivers of change

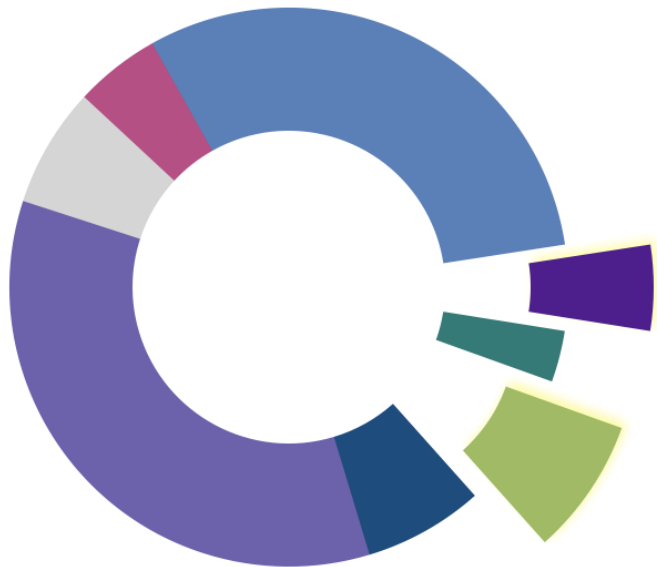
Environmental & technological changes.

Jobs of the future

Increase in high-level qualifications and creation of stronger ties with other sectors. New jobs and new opportunities.

Skills of the future

Changes in the production processes will create high need for new skills and specialisation (in particular – digital). Transdisciplinary approach towards skills. Demand for physical tasks will decrease.



- Clerks
- Craft and related trades workers
- Elementary occupations
- Legislators senior officials and managers
- Plant and machine operators and assemblers
- Professionals
- Service workers and shop and market sales workers
- Technicians and associate professionals



SELECTED LEADERSHIP

- EU PERSPECTIVE

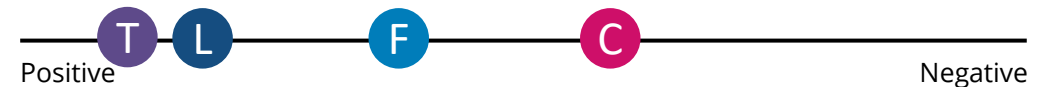
Job situation in Selective Leadership scenario based on ISCO clarification



- Clerks
- Craft and related trades workers
- Elementary occupations
- Legislators senior officials and managers
- Plant and machine operators and assemblers
- Professionals
- Service workers and shop and market sales workers
- Technicians and associate professionals

Selective high value-added subsections or product types achieve global leadership, while other subsections are struggling to remain competitive on the global market.

Character of impact for the TCLF industries



Production focus

The industry will specialise in high added value goods - either highly advanced technologically or with creative or brand-driven value.

Main drivers of change

Regulation and policy & Technological changes.

Jobs of the future

Stable level of job needs due to the balance between growing sub-sectors and those fading away. Technological leadership may increase interdisciplinary mobility while focus on high added value – increase the seclusion.

Skills of the future

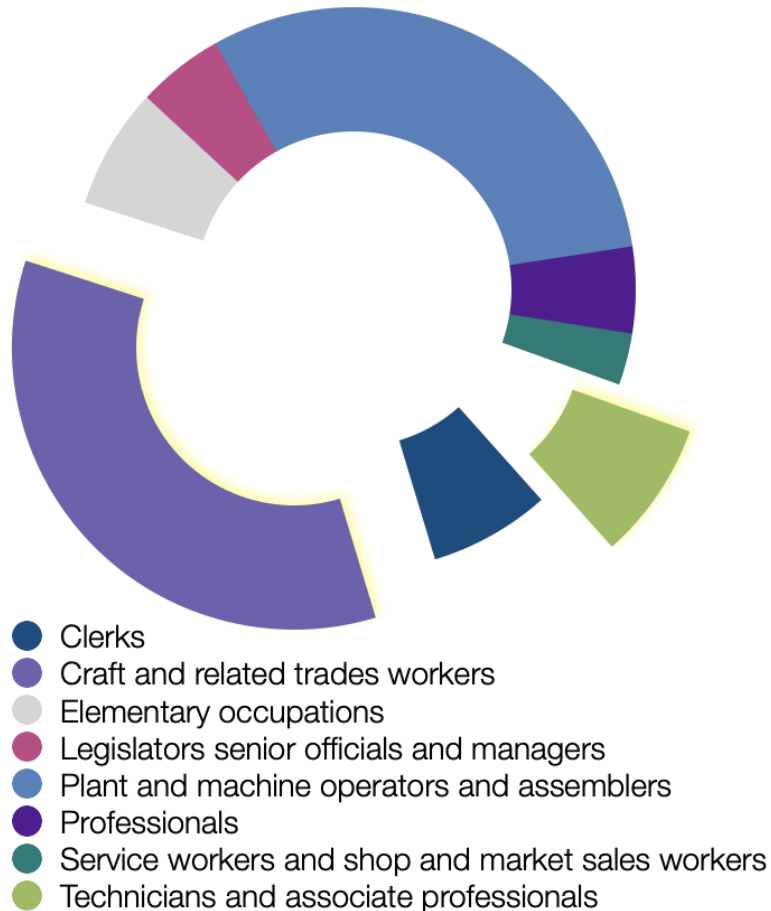
Decrease variety of produced goods may lead in longer term to extinction of certain skills. The key focus will be on conventional and digital skills.



RENAISSANCE OF THE CRAFT

- EU PERSPECTIVE

Job situation in Renaissance of the Craft scenario based on ISCO clarification



Wide-spread sustainable, conscious consumer behaviour gives rise to local production/consumption/recycling models based on traditional, but technology-enhanced concepts.

Character of impact for the TCLF industries



Production focus

The TCLF sectors by combining heritage with technological developments will offer new range of goods from different price levels that are produced locally.

Main drivers of change

Economy, environment & changing consumer demand.

Jobs of the future

The job demand will be on high level, especially for occupations with manual skills and replacement of retiring workforce. Cross-industrial workforce exchange will be limited.

Skills of the future

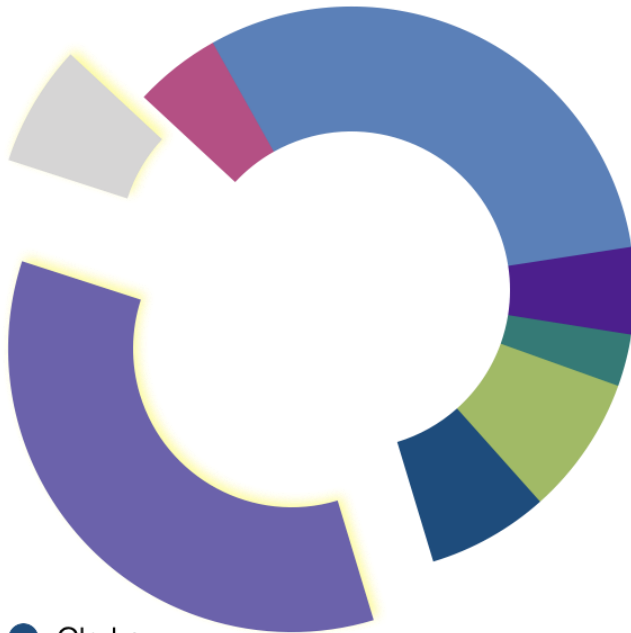
Crucial advantage in this scenario is the use of skills and knowledge that we already have and that are part of European TCLF heritage. Green and conventional skills will play crucial role in the industry.



WALLED GARDENS

- EU PERSPECTIVE

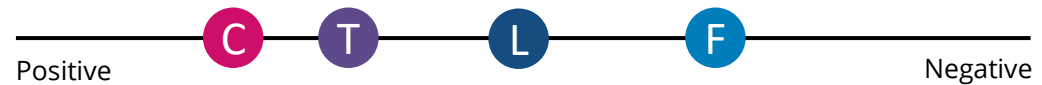
Job situation in Walled Gardens scenario based on ISCO clarification



- Clerks
- Craft and related trades workers
- Elementary occupations
- Legislators senior officials and managers
- Plant and machine operators and assemblers
- Professionals
- Service workers and shop and market sales workers
- Technicians and associate professionals

Rise of regionalism and protectionism stifles global trade flows and enables existing regional production clusters in Europe to survive and thrive.

Character of impact for the TCLF industries



Production focus

The industry will focus on manufacturing of goods that are globally competitive, especially in the context of costs of production. The importance of clusters will increase.

Main drivers of change

Regulation and policy & Economic and globalisation.

Jobs of the future

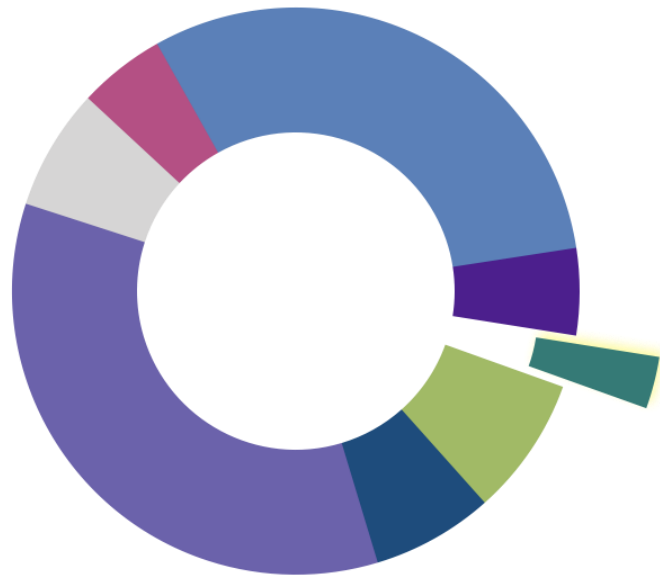
This future scenario may deepen the differentiation among the location of the workforce, creating gaps between regions and gathering more skilled employees only in certain areas of Europe.

Skills of the future

Demand for physical and conventional skills will dominate over green and digital skills. The retirement of the workforce may lead to disappearance of certain knowledge.



Job situation in Industrial Sunset scenario based on ISCO clarification



- Clerks
- Craft and related trades workers
- Elementary occupations
- Legislators senior officials and managers
- Plant and machine operators and assemblers
- Professionals
- Service workers and shop and market sales workers
- Technicians and associate professionals

The global race to the bottom fuelled by cheap, fast fashion continues unabated and drives most TCLF production to lowest labour cost locations outside Europe.

Character of impact for the TCLF industries



Positive

Negative

Production focus

The industry will face a significant decline in terms of the volume of the production. The types of production that will remain in the market will be focused mostly on component of the final items or on a premium goods (*Made in EU* label).

Main drivers of change

Regulation and policy & Changing consumer demand.

Jobs & skills of the future

In the context of job and skills, this is the most pessimistic scenario for TCLF industry. Due to the outsourcing the job demand will be limited and focused mainly on the replacement.

Lack of evolution of the industry will suppress development and exchange of skills. Digital skills will focus mainly on interaction with customers.



JOB AND SKILLS NEEDS IN THE FUTURE

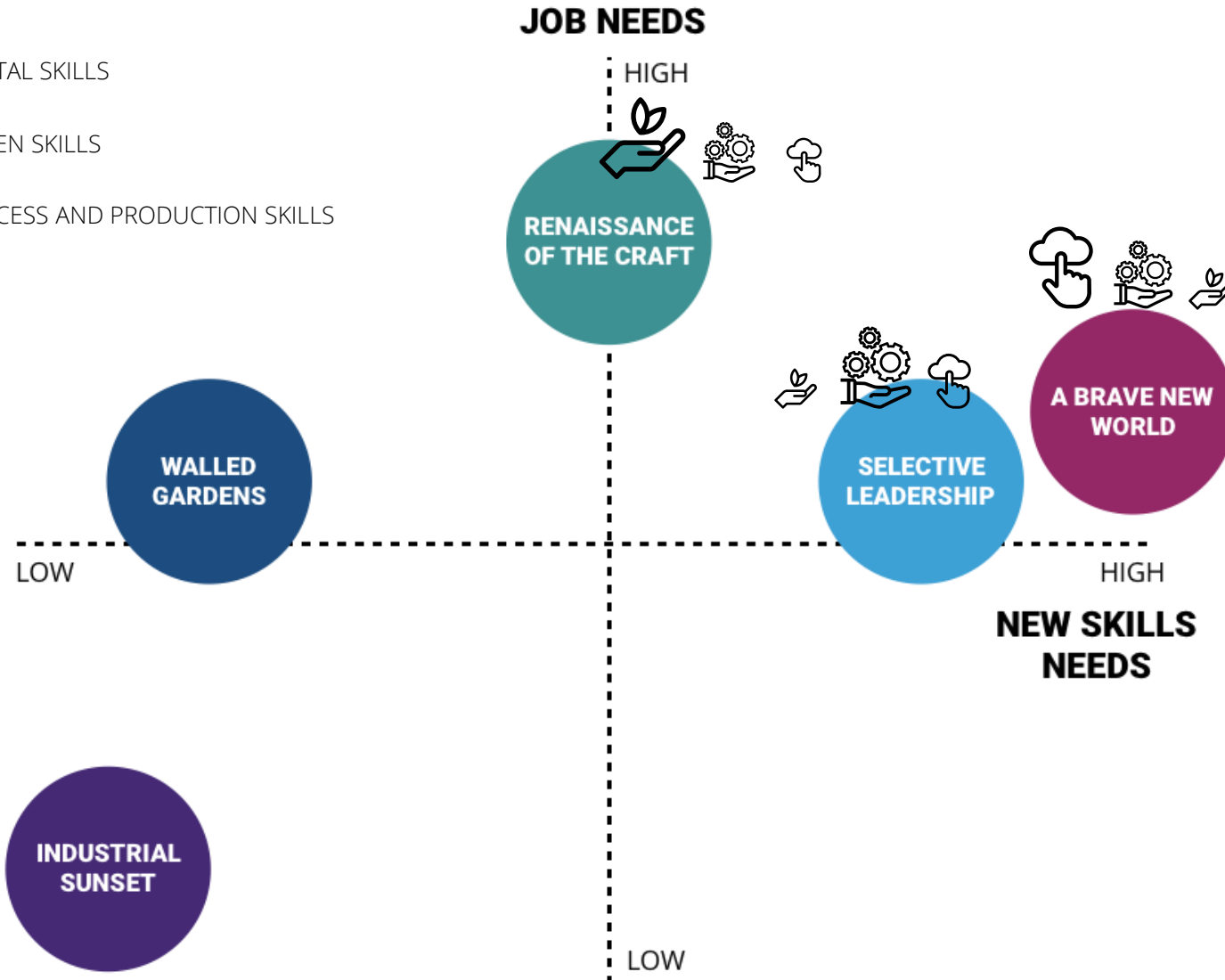
according to the 5 possible scenarios

LEGEND:

 - DIGITAL SKILLS

 - GREEN SKILLS

 - PROCESS AND PRODUCTION SKILLS



THANK YOU FOR YOUR ATTENTION

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