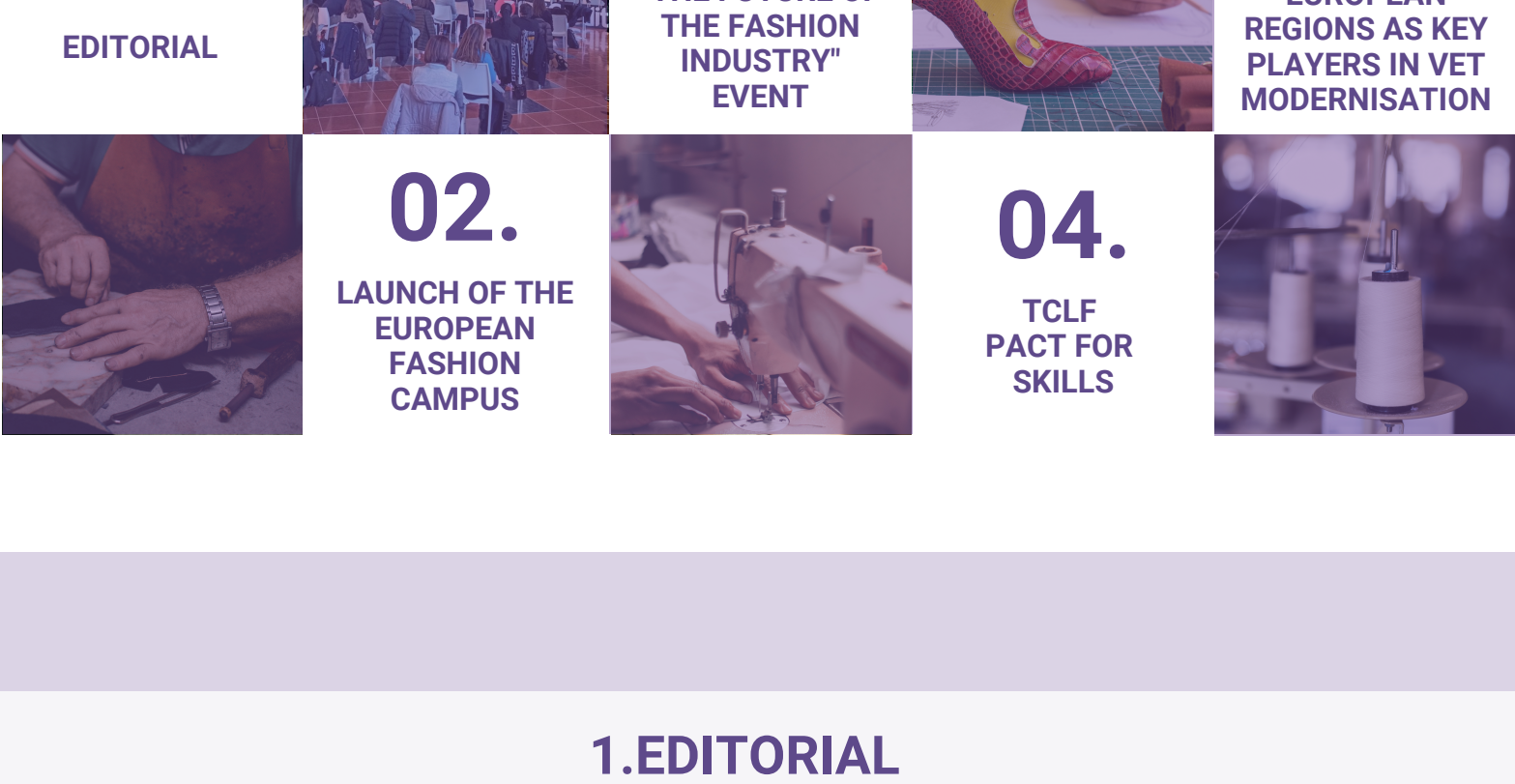




# Skills4Smart TCLF Industries 2030



## 1.EDITORIAL

Gustavo Gonzalez-Quijano - COTANCE

Our Skills4Smart TCLF project has entered the last leg of its four and a half years old journey. Indeed, with the completion expected in June 2022, the final activities are being organised while the partnership is also looking to the future. In this Newsletter we are introducing you to the latest outcomes and what you may expect after the end of the project.

First, Spin360 presents one of the main results of the Skills4Smart project, i.e. the European Fashion Campus, a virtual platform where the partnership will collect in one single and practical place (www.europeanfashioncampus.com) all the relevant information on education and training in the TCLF industries based on S4TCLF project outcomes, as well as contributions from external VET providers.

During the pandemic, no presential event could be organised. It was therefore a true pleasure for the partners to be able to meet in person and share their activities with an external audience during the Future of the Fashion Industry workshop held in Firenze, during the Pitti Uomo Fair on 12 January 2022. Our partners PIN (Università di Firenze) and Politecnico Calzaturiero are reporting on the event.

Finally, we are looking ahead with a major initiative that will build on the achievements of the Skills4Smart TCLF project. Indeed, EURATEX presents the TCLF Pact for Skills launched by the Commission on 16 December 2022 and explains how tightly it is linked to the project. Last but not least, CEC (European footwear association) follows up on the subject by outlining the specific role of Regions in the framework of the TCLF Pact for Skills.

## 2. LAUNCH OF THE EUROPEAN FASHION CAMPUS

Christian Baio & Elisa Pagliaroli - Spin360

**A virtual place for learning across the textile, clothing, leather, and footwear industries.**

Imagine having in one single virtual place all the information, knowledge, courses and best practices related to the Textile, Clothing, Leather and Footwear industries (TCLF) at European level tailored to your needs...

...Well, this is exactly what the European Fashion Campus (EFC) offers you.

With the vision to allow the deployment of the sectors' relevant skills and competences and with the aim of consolidating a European network structure for the whole TCLF industries in terms of VET and training provision, the partners of the Skills4Smart TCLF 2030 Blueprint brought their expertise and added value into the creation of a platform that allows you direct connection to updated knowledge, information and curricula developed at the EU level.

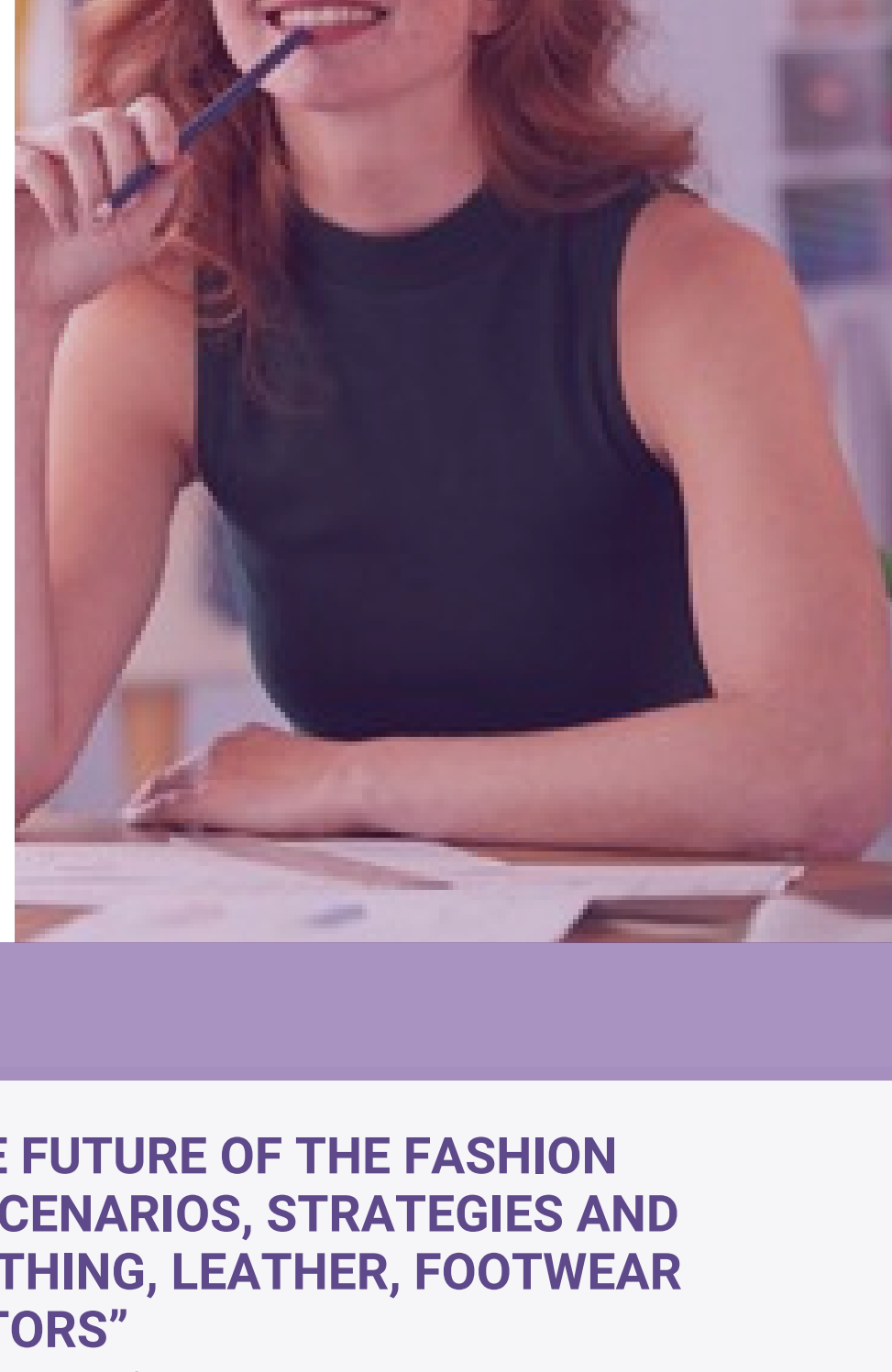
By browsing into the Campus, you will have the opportunity to find across the TCLF industries:

- Direct links to training and education courses
- Best practices, success stories
- Research, reports and articles
- News and events

All that offered through a customized experience, meaning that what you are looking for can be filtered according to:

- Who are you? – whether an education and training provider, a company, a young student or a worker at all levels
- What do you need? – a specific subject, language, format, access conditions, EQF level and more...

Everyone can benefit from the EFC. Join our community, either as a contributing partner in order for your courses to be advertised in the EFC, or as a beneficiary of this wide European learning offer.



## 3. PUBLIC EVENT ON “THE FUTURE OF THE FASHION INDUSTRY: INNOVATIONS, SCENARIOS, STRATEGIES AND SKILLS IN THE TEXTILE, CLOTHING, LEATHER, FOOTWEAR SECTORS”

Alessandro de Rosa, POLO UNIVERSITARIO CITA DI PRATO, & Alice Marcato, POLITECNICO CALZATURIERO

Organized in Florence on 12 January at the Pitti Uomo fair, the first public event of the Skills4Smart TCLF project under Covid protocol, was attended by 60 participants on site and 377 online. In addition, 70 fashion-oriented high schools also participated with their students. A big success!

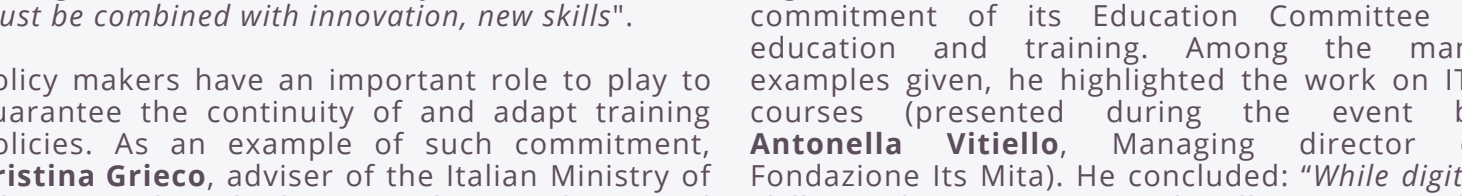
### The challenges of the textile-clothing-leather-footwear sectors

Dirk Vantyghem (EURATEX), Carmen Arias Castellano (CEC) and Gustavo Gonzalez-Quijano (COTANCE) kicked off the conference by emphasizing the necessity of training young people, reskilling and upskilling workers in the TCLF sectors. Those needs were further detailed by Katarzyna Sulisz and Iratxe Garcia (EURATEX).

They reported the results of the project's research that reveals that 36% of the workforce in the fashion industry in 2020 was over the age of 50 (+2% compared to 2019) and that over 700.000 workers would need to be replaced by 2030, a major concern for Italy, Romania, Poland, Portugal and other key TCLF countries. In addition, 61% of the EU's TCLF companies are in need of digital skills, while 40% will need green skills.

## POTENTIAL EMPLOYMENT IN 2030

BASED ON EURATEX FORECASTING MODEL



Source: Skills4Smart TCLF Industries 2030

5 possible scenarios illustrated in the Florence event were the basis for the TCLF Strategy developed in the framework of the project. Each of them requiring different strategies and actions. “New patterns must be followed”, argued Claudio Marenzi (Herno/Pitti Immagine) during a roundtable, while Bruno Contorno (Nice Footwear) emphasized the competitive edge of the fashion industry's craftsmen. Sustainability is also a key priority, as was highlighted by tannery CEO Graziano Balducci (Conceria Antibà): “We have invested in processes that reduce substantially the use of water. Our aim is reaching “zero impact” and all our actions go precisely in this direction.” CEO Maurizio Sarti (Faliero Sarti) added that sustainability should be reinterpreted in the light of new technologies: “We must defend our heritage, enhance the “beauty” which, however, must be combined with innovation, new skills”.

Policy makers have an important role to play to guarantee the continuity of and adapt training policies. As an example of such commitment, Cristina Grieco, adviser of the Italian Ministry of Education, described a recently signed protocol developed in order to “create synergy between schools, training institutions and companies, with the objective of guaranteeing good employability and employment for young people. A balance must be found between theoretical and applicative training”.

Another example on how to develop skills responding to the needs of the districts, is the “Local Pact for the development and enhancement of skills”, signed between the Tuscany Region and the Municipality of Prato, consistent with the European guidelines of the European Pact of Skills.

“We are in a moment of great opportunity with PNRR funds and the resources of the new seven-year European funds. Today training and active labour policies are back at the centre of the institutional political debate”, said the assessor of Tuscany Region, Alessandra Nardini.

In the second section of the event, the tools developed during our project were introduced:

- the “European Fashion Campus” (see our separate article)
- the e-learning Platform with the eight training courses (presented in our previous Newsletters).

Closing the event, Paolo Bastianello, Chair of Confindustria Moda, which supported the organization of the conference, underlined the commitment of its Education Committee in education and training. Among the many examples given, he highlighted the work on ITS courses (presented during the event by Antonella Vitiello, Managing director of Fondazione ITS Mita). He concluded: “While digital skills may be important, people will not wear pixels” and “TCLF companies need technicians”.

The event was organised by PIN and Politecnico Calzaturiero with the collaboration of Pitti Immagine and Centro Firenze per la Moda, demonstrating thus great attention and sensitivity to the themes of education and training for TCLF.

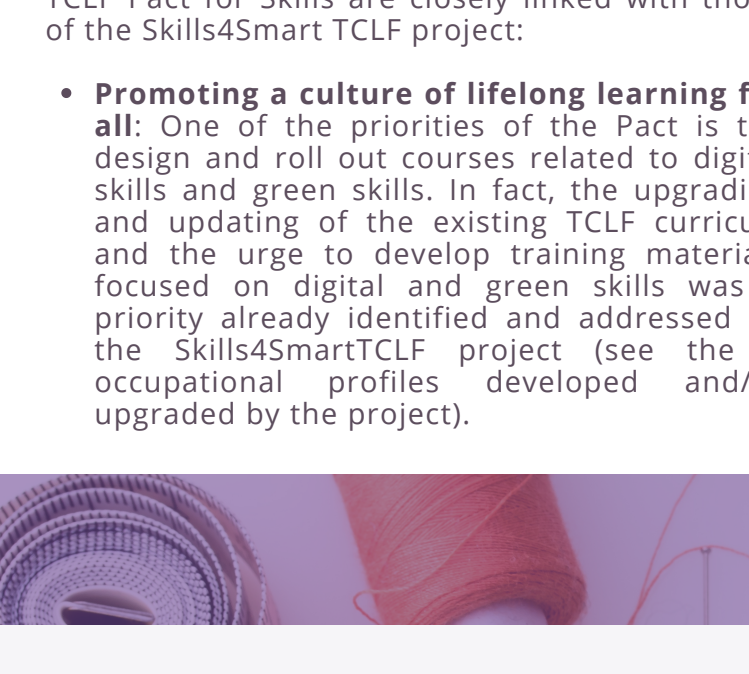
## 4. THE PACT FOR SKILLS AND THE S4TCLF BLUEPRINT PROJECT

Iratxe Garcia-Bayona - EURATEX

### Scaling up the objectives of the Skills4Smart TCLF project

Last 16th December 2021, the Pact for Skills for the Textile, Clothing, Leather and Footwear sectors was officially launched through a big communication campaign on social media. The initiative, promoted by the European Commission and coordinated by the three European umbrella organisations EURATEX, CEC and COTANCE, aims at maximising the impact of investment in upskilling and reskilling by partnering up the key actors of the industry and boosting their cooperation and joint collaborative actions. The initiative has already gathered the endorsement of 118 organisations including national industry associations, education providers, companies, social partners and regional authorities.

The signatories of the Pact acknowledge the skills challenges identified in the charter document and commit to implement specific measures to tackle those priority issues, which include investing in reskilling and upskilling of the workforce, integrating green and digital skills and improving the attractiveness of the TCLF sectors towards potential new workers.



The objectives and target actions listed on the TCLF Pact for Skills are closely linked with those of the Skills4Smart TCLF project:

- **Promoting a culture of lifelong learning for all:** One of the priorities of the Pact is the design and roll out courses related to digital skills and green skills. In fact, the updating and upgrading of the existing TCLF curricula and the urge to develop training materials focused on digital and green skills was a priority already identified and addressed by the Skills4Smart TCLF project (see the 8 occupational profiles developed and upgraded by the project).

- **Building a strong skills partnership with relevant stakeholders:** While the signatories of the Pact aim to build regional and cross-sectoral partnerships between industry, education providers and authorities, which are adapted to their specific needs, the Skills4Smart TCLF consortium stands out as the clear reference point in which this sectoral strategic partnership will build on.
- **Monitoring skills supply/demand and anticipating skills needs:** To reach this objective, industry, policy and education stakeholders aim to establish the TCLF Skills Observatory. On this regard, the Skills4Smart TCLF project already pioneered the largest scale research on skills needs ever made in the TCLF industries up to date. Of course, such monitoring requires regular updates with an established Observatory but the methodology and results of the research made by the S4TCLF project will undoubtedly represent an important reference.
- **Working against discrimination and for gender equality and equal opportunities:** Signatories will launch a manifesto of diversity and supporting initiatives to improve the gender balance and ensure equal opportunities for all, which is also in line with the transversal objectives of the Skills4Smart TCLF project.
- **Raising awareness and attractiveness of the TCLF industries:** Just as the Skills4Smart TCLF project has been actively doing during the last years, the Pact aims at developing dedicated information campaigns showcasing the career opportunities in the sector. For this purpose, the experience gathered within the S4TCLF project (i.e. supporting materials for the School Info Days, the short documentary video, the European Fashion Campus, etc.) will be highly valuable tools for the actions of the Pact.

In fact, the Skills4Smart TCLF project can be considered the seed and precursor of the TCLF Pact for Skills initiative. The results of the project will represent a highly valuable asset and reference for any actions implemented in the framework of the Pact and the S4TCLF consortium members will remain as key actors on the development of this new initiative.

As for the future steps on the implementation of the Pact, starting in early 2022 the European Commission will offer certain tools to all signatories so they can benefit from collaboration at EU, national and regional levels, particularly by providing access to networking, knowledge and guidance resource hubs. In parallel, as of February 2022, EURATEX, CEC and COTANCE will also start the first contacts with all the endorsing stakeholders to translate the content of the Pact into concrete actions.

## 5. EUROPEAN REGIONS AS KEY PLAYERS IN VET MODERNISATION

Carmen Arias-Castellano - CEC

Vocational Education and Training (VET) plays a crucial role in industrial competitiveness across European regions. Supporting modern and responsive VET systems and giving a voice to VET providers when devising Smart Specialisation Strategies will ensure that the future workforce better responds to companies' and regions' skills needs. Because VET is predominantly a regional competence in EU countries, increasing the share of TCLF employees benefitting from upskilling and lifelong learning opportunities can only be achieved if VET providers, companies, and regional decision-makers work hand in hand. This is why the S4TCLF Blueprint's Network of TCLF VET Providers promoting Excellence and the Network of EU Regions supporting VET modernisation in TCLF projects will become crucial elements of the recently launched EU TCLF Pact for Skills' success.

When it comes to VET policy, regional authorities have often the upper hand, and the S4TCLF consortium is engaged with decision-makers in EU TCLF industrial regions to establish an EU Network of Regions supporting TCLF skills modernisation. In discussions, they agreed on the necessity for VET to take centre stage in regional policy and on the crucial importance of all relevant stakeholders to get together and act in a concerted way to adequately address skills mismatches.

Smart public investments and support to modernise and integrate VET in regional development will only bring positive results to EU regions. Because VET is a catalyst of innovation and applied research, because it best addresses demographic, labour, and technological changes, and because it contributes to valorise human capital, strong VET ecosystems will make regional economic structures more responsive to disruptions and uncertainty, boost TCLF companies' growth, and attract better-qualified young talents.

This is particularly the case in the TCLF sectors where geographical concentration is high and many companies operate in regional clusters. When it comes to concrete actions, regions can act at two different levels:

**At the intra-regional level**

- Support the collaboration between all relevant stakeholders
- Involve VET in the development and implementation of Smart Specialisation Strategies
- Investments on attractive and modern learning facilities and technologies
- Support the alignment of VET offer with local/regional needs
- Facilitate autonomy of action and of use of financial & human resources
- Promote the added value of VET towards the public, students and parents.

**At the inter-regional level**

- Coordination & alignment between national and regional/local VET policy, inter alia having as reference the EU TCLF Pact for Skills objectives
- Collaboration with other EU regions on skills development via Networks of Centres of Vocational Excellence
- Share of success stories, knowledge and best practices (peer-learning) in supporting vocational excellence
- Build international networks to foster international skills recognition and mobility

The S4TCLF partners will take advantage of the momentum created by the launch of the EU TCLF Pact for Skills, and deep on previous actions with regional authorities to maximising the potential of VET in terms of contribution to both human capital and regional development, and efficiently and rapidly respond to TCLF companies' needs.

### TOP 10 REGIONS IN TERMS OF TCLF EMPLOYMENT IN EU-27

Country	Region	Manufacturing	Manufacture of textile	Manufacture of wearing apparel	Manufacture of leather and related products	TCLF	TCLF / Manufacturing
Portugal	Norte	390.479	39.323	79.662	46.356	165.738	42%
Italy	Toscana	301.149	23.311	38.904	47.381	106.487	36%
Italy	Lombardia	902.815	41.022	36.571	12.213	89.806	10%
Italy	Veneto	531.620	11.081	28.856	28.953	65.890	13%
France	Ile de France	1.073.912	2.896	22.658	17.765	43.319	4%
Poland	Lódzkie	203.599	13.183	25.719	9.116	39.818	20%
Spain	Comunitat Valenciana	244.687	13.312	4.407	19.640	37.359	15%
Italy	Marche	154.748	2.180	10.618	24.083	36.881	24%
Romania	Centru	219.158	7.848	15.980	12.420	36.248	17%
Italy	Campania	183.155	2.952	16.848	14.560	34.360	19%

\* TOP 5 regions in terms of share of TCLF employment in total manufacturing employment are: Norte (PT) with 42%, Lodzkie (PL) with 40%, Toscana (IT) with 36%, Nord-Est (RO) with 28% and Spetsializatsiya (BG) with 28%.

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Cooperation for innovation and the exchange of good practices

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