

## FACT SHEET - TCLF industries skills challenges and opportunities

Webinar | Understanding skills challenges and opportunities in Textiles, Clothing, Leather, and Footwear (TCLF) Industries across European regions



 **WEBINAR**

### TEXTILES, CLOTHING, LEATHER, AND FOOTWEAR (TCLF) INDUSTRIES SKILLS ANALYSIS

Understanding skills challenges and opportunities in  
TCLF Industries across European regions

 15 OCTOBER 2024



Webinar promoted by EARLALL's Working Group on Skills and Labour Market



| [www.earlall.eu](http://www.earlall.eu)

The information and data included in this fact sheet was shared during **EARLALL's webinar on "Understanding skills challenges and opportunities in Textiles, Clothing, Leather, and Footwear (TCLF) Industries across European regions"** which took place on 15 October 2024. This initiative was promoted by EARLALL'S Working Group on Skills and Labour Market.

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The webinar presentations and the recording are available on **[EARLALL's website](http://www.earlall.eu)**



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The TCLF industries are part of what is known as the textile ecosystem. This includes the **production of textiles, apparel, footwear, leather, and jewellery.**

### FACTS & FIGURES

- TCLF industries employ **2.2 million workers, with 99.5% being small and medium-sized enterprises (SMEs) in Europe.**
- These industries face challenges in upskilling and reskilling the workforce, **especially with 750,000 employees expected to retire by 2030.**
- The proportion of employees **over 50 years old** has increased **from 27.9% in 2012 to 41.9% in 2022.**
- About **55% of European companies** in the TCLF sectors report difficulties in ICT positions.
- Around **40% of companies acknowledge a gap in green skills**, indicating a pressing need for workers proficient in sustainable practices.



### MAIN CHALLENGES

- **Skills gaps and shortages due to an aging workforce.**
- **Low interest from younger generations, especially in manufacturing, due to perceptions of low innovation and poor compensation.**
- **Challenges in retaining a skilled workforce.**
- **Skill shortages and difficulty adapting to new business models.**
- **Mismatch between education and industry needs.**
- **Limited digitalization and ICT vacancies.**
- **Low worker mobility.**
- **Gaps in green skills needed for a more competitive and sustainable textiles sector.**



**TCLF Skills Alliance:** is the EU Pact for Skills Large-Scale Partnership dedicated to Textile Clothing Leather and Footwear (TCLF).



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### FACTS AND FIGURES FROM EARLALL MEMBER REGIONS



**In Sweden, the broader textile sector employs around 85,000 people, with 22% of them based in Västra Götaland.**

**The TCLF industries in the Region Västra Götaland:**

Sweden's leading region for Textiles with centre in Borås Region:

- The **textile industry** employs just over 6,000 people in Västra Götaland. The sector also includes **retail, shops, laundries**, etc., with nearly 18,000 employed in Västra Götaland.
- **Strategy goal for 2030** "Together we will ensure Västra Götaland sets an example in the transition to a sustainable and competitive society."
- Four **cross-sectoral focal areas**: Completed studies ; Digitalisation ; Electrification and Circular business models.
- **Trends**: Consumer behaviours in the textile industry are changing rapidly, with growing sustainability demands, rising e-commerce sales, and advancements in textile technology.

**European Qualification Framework (EQF):**

- It is utilized to create educational programs, validate skills, and improve job matching.
- Micro-credentials are being used to teach specific, high-demand skills.
- Tailored learning opportunities that meet the evolving needs of the industries.

**Lifelong learning** is important in supporting the industry's transition from a linear to a circular economy and so to create new professions, named circular jobs.



**Catalonia accounts for 36% of Spain's total textile production. In particular:**

- "El Maresme" is the area where most of the knitting textile production is located historically.
- 1 out of every 6 companies is dedicated to textiles.

**Institut Lluís Domènech i Montaner:**

- Aims to foster student autonomy, teamwork, and project-based learning, closely mirroring the dynamics of the textile industry.
- **100 years educating in textiles: more than a fashion design!**
- Dressmaking and fashion (60 students), Textilmaking and ennoblement (15 students) and Patternmaking and fashion (55 students).
- Essential role of the educational institutions play in **bridging the gap between students and companies.**
- Institute works on a **project-based approach**, blending theory and practical application.

**Future is now - Quality and technical skills such as:**

- Clo 3D, Printer 3D, Shima Seiki, Penelope, Gerber and Embroidery.
- The **collaborative between companies and educational institutions is key** for innovation and growth in the textile sector.

**Why do we exist ?**

Students	Institut Lluís Domènech i Montaner	Companies
Result of 30 average students, 18 years old		Result of 30 senior students, 20 years old
-10% are looking for work		-35% continue studying a degree
-40% Continue studying (Superior)		-20% studies and works
-40% Study and work		-45% work
-10% Have a job		

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### TCLF Industries in Tuscany: more than a Fashion District:

- In Tuscany, talking about Fashion means referring to some manufacturing specializations dedicated to the production of consumer goods such as clothing, footwear, and accessories.

### Workforce:

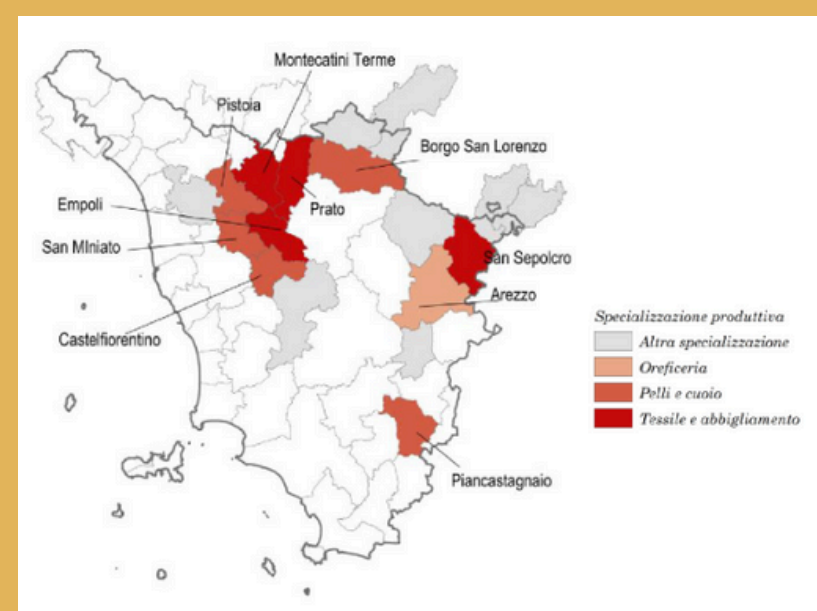
- In Q2 2024, despite lower demand, the workforce grew by 34,000 employees compared to 2023, a 2.6% increase.
- High percentage of female workers, plays a crucial role in the local economy.

### VET in Italy's education and training system: ITSs and their role across the national and regional VET System:

- ITSs (Technological Higher Education System), a non-academic education pathway aligned with company needs, providing students with skills required by the fashion industry.
- Multi-level governance model ensures that decisions reflect both national and regional priorities.
- ITSs? **Anticipating skills, engaging companies.**

### Made in Italy sector, MITA:

- Provides a technical/scientific educational program based on the acquisition of skills through a practical, 'learn by doing' methodology.
- Two year ITS Made in Italy and Fashion Specialization Diploma (Level 5 EQF) - attendance is compulsory
- MITA offers also different courses of variable duration to obtain a **certification and/or micro credential** for specific professional profiles in the fashion sector.
- MITA graduates have an **over 95% success rate in obtaining future employment, above the national average of 85%.**



### In France, the luxury sector employs over 37,000 people, while in Centre-Val de Loire...

- There are **5,060 employees.**
- Leather good industry : 52% of the CVL Region's TCLF industry.
- 14% of the employees in the French leather industry sector are employed in the Region.

### Strength of the Vendôme territory

- A will from the local authorities to create a city of luxury manufacturing and craftsmanship.

### Challenges:

- Aging territory.
- Rural area.
- Low unemployment.
- No training opportunities targeted on the leather industry.
- Inadequacy between traditional education and the leather industry's needs.

### The DEFI project: A new initiative:

- A program linking vocational skills training with employment opportunities.
- 90% of enrolles graduated and 100% of permanent contracts signed last year.
- Shows how vocational education can lead to tangible employment outcomes, even helping to create a vocational high school diploma in the region.



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### EU INITIATIVES FOR THE DEVELOPMENT OF SKILLS FOR THE TEXTILES ECOSYSTEM

- **The European Skills Agenda:** Flagship action of the European Skills Agenda to support upskilling and reskilling of workers.
- TCLF EU Pact for Skills: **Find out more about the Skills Partnership for TCLF industries:** bringing together industry associations, companies, trade unions, vocational education/training providers, and regional authorities to mobilise the textile ecosystem to upskill and reskill the workforce.
- **EU strategy for sustainable and circular textiles (2022).**



### MAIN OPPORTUNITIES & LESSONS LEARNED

- The sector is evolving from labour-intensive to knowledge-driven.
- Adopting a circular economy can ensure TCLF industries remain competitive.
- Use the European Qualification Framework (EQF) can create programs, validate skills, and improve job matching.
- A Lifelong learning approach can support the shift to a circular economy.
- Education should blend theory with practical, project-based learning.
- Collaboration between local companies and educational institutions is key for innovation and growth.
- Higher education systems, such as ITS Foundation System (Technological Higher Education System in Italy, can help anticipate skills needs and engage companies.
- New programs link vocational training directly with employment opportunities are needed, such as DEFI in France.
- Businesses can serve as training providers.
- Strong partnerships between educational institutions, companies, and governance bodies are crucial.
- Erasmus+ funding supports mobility for learning from international peers.

