Establishing a Network for the Educational Fashion Line of Business to Improve European Cooperation and Enhance Mobility

MARKETING PLAN
WP 3

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Colophon

This marketing plan is result 5 of the project and is part of work package 3: implementation and impact.

The main objective of this work package is to provide publicity for and awareness of the project and to promote the network among target groups, giving information about the importance of the network and about work placements abroad.

A marketing plan has been written in order to ensure the survival of the network, to provide publicity and awareness, and to 'sell' the network. The plan is tailored to the wishes and needs of the partners of the EUrFASHION network and the future members.

Of course, the marketing of our network is a dynamic process that must adapt continuously to changes in the market. Therefore, the marketing plan should serve a long-term goal as well as a short-term goal.

- In the short term, the marketing plan is used to expand the EUrFASHION network and to actively recruit potential network members.
- In the long term, the marketing plan is a blueprint that can be used beyond the lifetime of the project.

The marketing plan is set up through questionnaires, which collect information about each partner. All project partners are involved in this work package with regard to their organisational background and context of networking strategies.
The questionnaire is divided into 3 main sections: 1. determining the objectives of the network, 2. determining target groups and new members/users, and 3. a SWOT analysis.

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in cooperation with

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1. Introduction

Mobility for students in general is increasingly popular today, but for students and professionals in the fashion and textile sector in education the opportunities for mobility are less common. This is due to the fact that this sector is rather small and only a few semi-private contacts within VET schools exist. This, together with the trends towards globalisation in the industry, illustrates why the demand for mobility cannot be satisfied by the current opportunities.

According to the objectives of work package 3 for implementation and impact, several aims and actions will be described in the marketing plan.

- share a common understanding of the network
- determine the partners' own objectives regarding the network
- make clear the added value for all relevant target groups
- determine standards that fit all network partners
- provide publicity and awareness
- promote the network
- inform stakeholders
- recruit new members

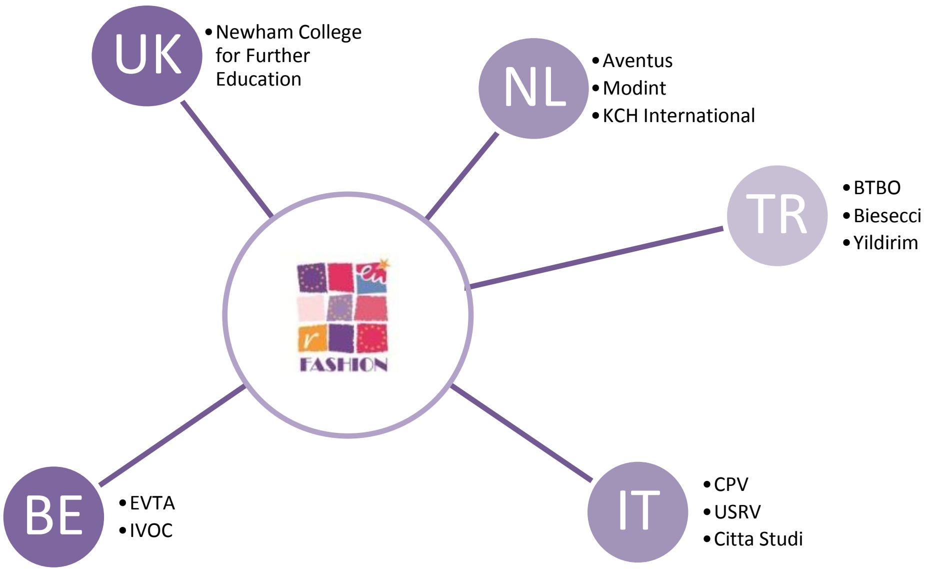
1.1 About EUrFASHION

The **EUrFASHION** project focuses on student mobility in the fashion and textile sector by building up a sustainable network and facilitating tools, such as reference profiles and a preparatory training programme.

This project is aimed at the following target groups: students, companies and VET providers who will benefit from the network throughout Europe (shot-term impact). In the long term, the target groups will benefit from a better gearing and more opportunities for Lifelong Learning.

1.2 Partnership (Steering Committee)

The consortium of EUrFASHION consists of a triangular alliance of a school-related, a company-related (labour market) and a sectoral-related (policy) organisation. Within each partner country this triangle will create the sustainable foundation for the European partnership. Different parties from one country, with different perspectives on education and the working world of fashion, are put together to create a network. The partners in the different countries are those who have already participated in previous LdV projects around a network in the trade sector or are experts in the fashion/textile line of business.



The Netherlands	KCH International	Centre of Expertise for VET
	Aventus	VET training centre
	Modint	Trade association for fashion, interior design, carpets and textiles
Belgium	EVTA	European Vocational Training Association
	IVOC	Institute for Training and Research for textile and clothing
Italy	CPV	Fondazione Giacomo Rumor – Centro Produttività Veneto (Chamber of Commerce)
	USRV	Ufficio Scolastico Regionale per il Veneto (autonomous body of the Italian Ministry of Education)
	Città Studi	Vocational Education Centre for textile and clothing
Turkey	BTBO	Bursa Tuhafiyeciler ve Benzerleri Odasi (Chamber of Textile)
	Yildirim	Vocational High School for textile production technology
	Biesseci Bursa AS	International Textile Production Company
United Kingdom	Newham College for Further Education	Further Education College

2. Marketing analysis

From an industrial manufacturing point of view, the textile, clothing and leather sector (TCL) is composed of the following subsectors, referring to the European statistical classification of economic activities, NACE Revision 2.

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

Fashion is not a subsector as such, but refers to the way clothing and other textile or leather products, styles and colors, change every season, and in that sense it constitutes a typical concept in the operations of the sector.

Key figures for the TCL sector in Europe (EU 27)

- The total employment in the TCL sector today is estimated at about 2.2 million workers.
- 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 seems to perpetuate.
- There are significant productivity differentials between the subsectors of TCL. Textile is more capital intensive and produces relatively higher added value, apparel and leather create relatively more jobs.

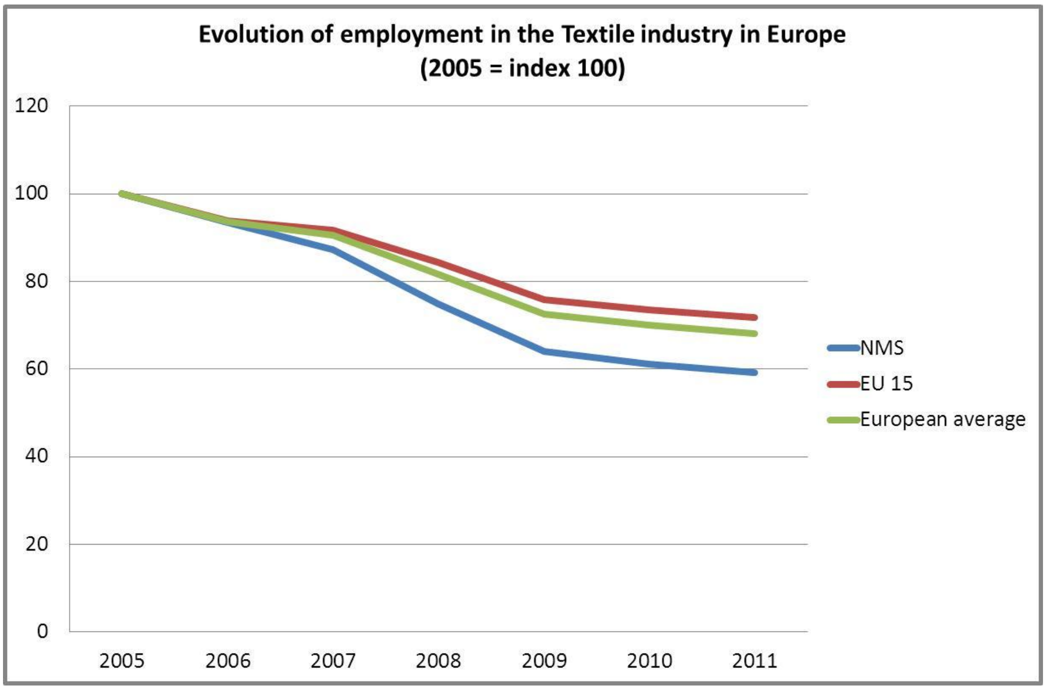
The total EU-27 textile and clothing industry, including manmade fibres but excluding the leather sector, did represent in 2011:

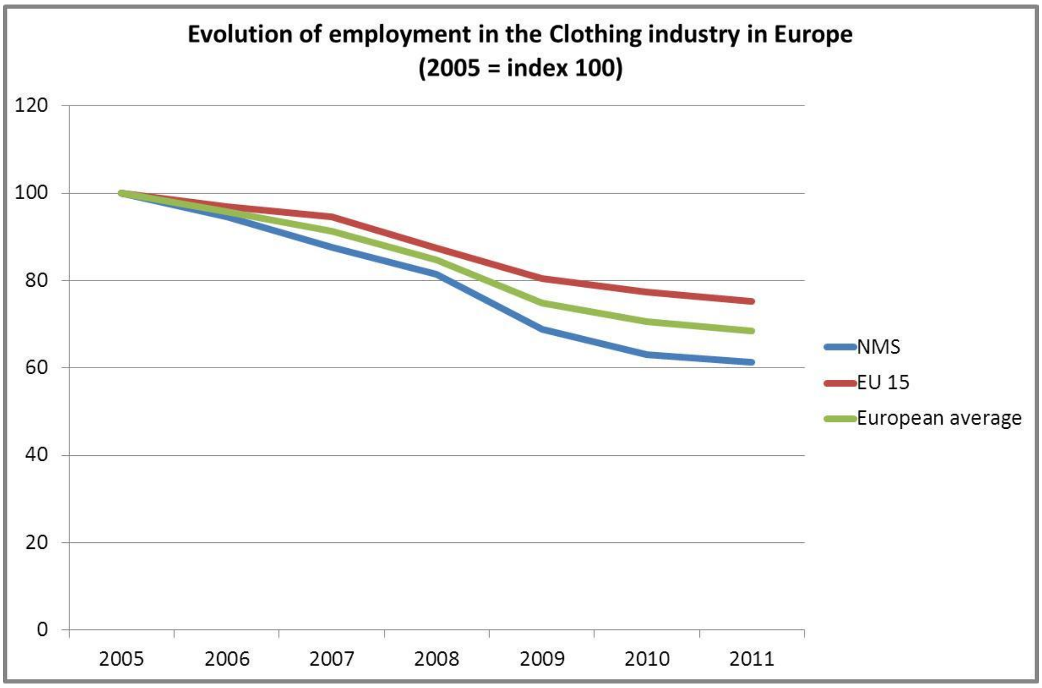
- Turnover of <u>171,400</u> million Euro (+4.8%) of which: textile & manmade fibres represent 54.8% and clothing 45.2%
- Investment of <u>5,150</u> million Euro (+6.7%) of which: textile & manmade fibres represent 63% and clothing 37%
- Companies: <u>186,865</u> companies (- 2.4%) of which: textile & manmade fibres represent 29.9% and clothing 70.1%
- Employment: <u>1,834,000</u> 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 and the employment per company remained stable at 9.8.
- The size of the companies is quite low (textile: 13, clothing: 9, total: 10) which explains why companies principally trade within the internal market while the Community Extra-EU exports reached 38,7 billion € or 21.7% of the global sales

Source: Euratex estimates, 2012

The evolution of employment since 2005 shows 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.





Source: Euratex

Concerning the employment evolution, 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 can not 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.

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 European 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 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 European countries 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 delocalised EU 15 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.

2.1 Skills needs

Within all future scenarios 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. The conviction that the strengthening of human resources in the sector is a key to new perspectives is central to the sectoral policies.

Not only the social partners, but also the companies themselves see the opportunities and stab energy in building a future. In addition to the relocation of the activities, the TCL also adopted other strategies. Many TCL companies are indeed familiar with innovation, flexibility, diversification and HR strategies, often with good results. These are the strategies that ensure that the activities can be maintained also in places with a less favourable cost-benefit structure. It remains difficult to face competition from low-wage countries, but it works. The main condition remains still a good product, either innovative or sustainable. Both of these features remain priorities for future operations in the TCL.

But innovating and putting a sustainable good product on the market, will never succeed without the people who have to make it true. Therefore, the TCL is still asking for motivated and skilled employees. In order to find those people, companies have had to revise their strategies.

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, has become a credible and effective instrument.

With different scenarios for the future, appear new competencies in the strategic recommendations of the consultants. Former secondary issues emerge as new core competencies on the foreground. The importance of logistics and commercial skills, for example, should appear among the recruitment needs of manpower planning 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 repelled production activities massively 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 will however be polyvalent. But versatility and flexibility demand training. Certainly since the early 90's it’s 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 able to work on different workstations. In periods of shortage, this allows production to continue.

A key finding of research on competence and recruitment needs is that most companies mention technical progress and new technologies, but further the respondents indicate mainly challenges and opportunities specific to their business or companies. It is indeed not easy to discover a general thread in the developments. Analysis deliver 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. We see that individual companies often follow their own course, also in terms of their HR-policies and the way they look to the future.

Yet there are also joint strategies. Both innovation and sustainability are key words in the more optimistic scenarios for the TCL. Many companies today 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 thread in the policies of more and more companies are indeed innovation and/or sustainability. The social partners see innovation and sustainability as key levers in the future developments in the sector. Innovation and job creation are indeed inseparable.

Finally, 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 remains, in various appearances (fashion, technical textiles, manufacturing, head-tail-structured companies, ...) playing a role in the economy and the labour market.
By focusing on the regional location of the TCL in Europe, and hence somewhat renouncing the national definition, we discover the real dimension and opportunities of the TCL. It must indeed be clear that the TCL in an increasingly integrating Europe should be appraised in the first place as engines for development and future of regions.

The main conclusion can not be different than recognizing the opportunities. And it is precisely in this field that **EUrFASHION** must play a role.

Sources

- Economix Research & Consulting (2009), Skills scenarios for the textiles, wearing apparel and leather products sector in the European Union, München
- Euratex (2012), statistics & structural data on the European T&C-sector (internal document), Brussels
- European Skills Council Textile, Clothing & Leather (2012), Annual Report. Launch of the activities & initiatives of the European sectoral council textile clothing leather for employment and skills, Brussels

3. Strategic orientation

3.1 Strategic concept

The core concept of the marketing of the EUrFASHION network is the reinforcement of competence by broadening the international training possibilities for future employees. The network is based on mutual trust, where members can share an ECVET-oriented process in organising and managing mobility so as to facilitate the organisation and planning of student mobility and therefore improve the process. Within the network, members share their expertise and can focus on capacity building. Nevertheless, promotion of the sector's image to young people, to make VET more attractive, is very important.

3.2 Strategic vision

Within the network, members transfer the national and/or regional work to the national/international dimension. They promote a facilitated mobility of students in a European context with a trust-based developed network and relationships, and high-quality professional support for the network members. Therefore, quality is more important than quantity.

This means our vision is to become a recognised network of qualitatively good members for mobility opportunities in VET in the textile and fashion sector.

3.3 Target groups

To create a sustainable network we need new members. For those new members, different roles and responsibilities are determined.

- Member
- Associate member
- Ambassador or Promoter

Members are actively involved in the network, and take part at meetings and conferences. They can also be part of the Steering Committee and be elected for the Board of Members (see Strategic Network Plan).
Associated members have a supportive role in the network.
Ambassadors have a promoting role in the network.

There are 5 target groups:

1. VET schools (formal education)
2. Students
3. Companies
4. Umbrella organisations & EU networks
5. Competent authorities

	type of organisation	added value for organisation	added value of the organisation for the network	respective name of the organisation in the network	roles and responsibilities in the network	how to approach them? with what necessary tools?
1	**VET schools** (formal education)	- Training opportunities - Existing wide European network with potential (mobility) partners	- Expertise in competence strengthening - potential (mobility) partners - sending students	- Member - Associate member	- Preparing the student - Being an intermediate organisation in mobility	- Existing local networks - Umbrella organisations - Personal contact (phone, face-to-face) - E-mail is the last resort - Estimating the request for mobility of students
2	**Students**	- International internship of high quality	- Ambassador	- No active member	- Ambassador - Promoter - Based on positive experience - Quality feedback	- Through VET schools (members) – enthusiastic teachers - Marketing events in school to share good experiences (spread the word) - Access to funding (long-term)

	type of organisation	added value for organisation	added value of the organisation for the network	respective name of the organisation in the network	roles and responsibilities in the network	how to approach them? with what necessary tools?
3	**Companies**	- Become actively involved in the process of vocational training and mobility - Exploit the advantages and benefits of hosting foreign students (new markets, international relationships, cultural awareness) - Enhancement of the profile of the employer - Additional workforce - Future employee	- Credibility & credits	- Member (active) - Associate member (passive) (depending on company)	- Provide work placements - Being host organisation - Ambassador	- Through local VET schools and existing networks - Branch organisations / trade unions - Personal contacts (phone, visit, mail)

	type of organisation	added value for organisation	added value of the organisation for the network	respective name of the organisation in the network	roles and responsibilities in the network	how to approach them? with what necessary tools?
4	**Umbrella organisations** (Chambers of Commerce, employers' federations representing SMEs and other sectorial organisations, social partners, industry associations) **EU networks**	- Access to a wide European network with peer institutions - Become actively involved in the process of vocational training and mobility	- Access to a wide European network with peer institutions - Promotion of ECVET-oriented process in mobility project strategies - Facilitate mobility by communicating with their members and disseminating the shared reference profiles	- member (active) (at least 2 per country)	- Intermediate organisation - Support where needed - Endorse the network - Being an agent - Be involved - Long-term vision on employability/economy - Research on labour market → It is their job!	- Existing contacts - Personal contacts - Inform them about the network/project - Raise awareness

5	**Competent authorities** (Ministry/governmental institutions)	- Promotion of ECVET-oriented process in designing and developing mobility strategies	- Official assessment of profiles (learning-, reference-, job-profiles) abroad	- Associate members (passive, strategic)	- Funding - Legal and political support - Minimise bureaucracy	- Through umbrella organisations (link to political level)

3.4 SWOT analysis

The SWOT analysis is used to estimate the current situation of each partner concerning the network and to identify both internal weaknesses and strengths as well as the opportunities and threats from the environment.

<table>
<tr><th colspan="2">SWOT analysis</th></tr>
<tr><td>+ Strengths:

- Expertise in education and training
- Expertise within own network
- Establishment of a personal relationship
- Existing national (local) partnerships
- Existing international partnerships
- Variety of training courses
- Diversity of project partnership
- Expertise and experience in mobility (exchange)
- Developing sectoral skills
- Knowledge of company's way of thinking, their needs and objections
- Motivated group
- Diversity of project partners
- EU-funding

- 1 specific sector
- 2 specific profiles</td><td>+ Opportunities:

- Access to expertise
- Possibility of learning from each other
- Stimulate language skills
- Scale effects (teamwork)
- Employment opportunities
- Working on the basis of a reference profile
- Transparency
- Stimulation of high-quality work placements
- Increase the visibility of mobility opportunities and possibilities
- Create synergies with other EU-projects and initiatives</td></tr>
<tr><td>- Weaknesses:

- Lack of decisiveness
- Customer-relations
- Quality of work placement companies abroad
- Hesitation of students
- Lack of internal policies of international mobility with VET schools
- Lack of interest by social and sectoral organisations/authorities
- Limit of resources (HR, finances)</td><td>- Threats:

- Age of students
- Commitment of companies
- 'Added-value' for companies
- Assurance of quality/commitment
- Language
- Long-term funding
- Economic (market) situation
- Lack of flexibility within students' schedule/training programme</td></tr>
</table>

4. Conclusion and actions

Based on the SWOT analysis, the strength of the network and of the various partners became visible. Based on the existing expertise and the existing network in which the partners are already, our first steps arise. Awareness will then systematically grow in parallel with the progress in the project.

4.1 Recruiting new (associated) members

- fine-tune the existing partners and their 'regions'
- approach existing contacts of partners

This will be done via personal visits, phone calls or e-mails (see EUrFASHION_marketing plan_getting started).

4.2 Expanding the network

Expanding the network is not only based on new (associated) members within the partners' countries, but also in other countries.

Therefore, the network should focus on existing international networks, EU-projects or partnerships, as well as adding more schools and companies within the partner countries.

- Germany
- France
- Denmark