

TANNERY IN TUSCANY

How the sector operates

Within the Tuscan fashion system, the tannery and leather industry, concentrated in the typical industrial district of Santa Croce-San Miniato, holds a highly relevant role in terms of turnover and employees. Although it constitutes a single production chain, the separation between raw material processing – vegetable tanning on the Arno's left bank and chrome tanning on the right bank – and production of leather accessories – which also involves third-party manufacturing – suggested the constitution of two focus groups. At national level, compared to the two still-existing tanning industries of Arzignano and Solofra, the Tuscan district holds the highest market share and a substantial export quota, while tannery has basically disappeared elsewhere in Europe.

The processing of hides and leather requires a complex multi-phase process, which has been supported by territorial concentration and adjustment mechanisms occurred over time. The high price of raw hides and the increasing competition from Asia and Latin American (where environmental costs are evaded), together with the transformation of the fashion system, had a destabilizing effect, but the district has developed new entrepreneurial strategies at both individual and collective level.

The distribution partnership with international labels have induced a speeding-up of production, a quantity reduction and a very high product diversification. The variety of manufacturing operations and the larger portfolio of new product proposals require highly specialized technical competencies, covering chemistry, physics and biology. The training offer has been concentrated in the district, through a close collaboration with the local technical institute, that launched a new course for chemical production operators in leather tanning and manufacturing, and the institution of the Tanning Technical Pole (Polo Tecnico Conciario – Po.Te.Co.) that joins forms of technical and university education, and was set up by enterprises with the participation of the Province of Pisa and the municipalities of the area.

Skill needs: strategic competencies and job profiles

Especially in the most dynamic firms, differently from the previous generations, the new entrepreneur has internalized and personalized the marketing function, because of the stronger relationships with global brands and multinationals, and consequently his **managerial and organizational** skills need updating through **specific courses**.

Machine operators, and specifically **shaving, cutting** and **drum operators**, are the most demanded specialized workers, as well as **dyers**. A new kind of position identified by firms is half way between the tanning technician and the stylist: since the brand creation process relies on the dialogue between the designer/stylist and the tannery or leather factory, a mediator capable of making these two worlds communicate with each other, and thus avoid material waste, claims and counterclaims, would be very useful.

In what concerns the administrative roles, the accounting competencies must be coupled with the legal and financial expertise necessary to deal not only with international contracting or the technical specifications of products, but also with the funding opportunities available at regional, national or European level. Since the district is export-intensive, the knowledge of foreign languages is also vital.

A common objective pursued by the most dynamic firms is the implementation of training programs delivered by educational institutions, but coupled with vocational courses that meet emerging needs in a more efficient and timely manner, as opposed to the long institutional times of the European calling system.

A taxonomy of the required professional qualifications

The table below combines data from three sources: the mandatory employment notices from firms to job centres, introduced in 2008; the IRPET survey on the training needs of the Tuscan firms having recorded higher-than-average turnover and employment rates after the crisis; the focus groups with firms belonging to strategic sectors for regional growth. The quantitative and qualitative data collected were used to classify occupations by employment capacity (number of newly employed), and job stability (combination of days worked and contract type).

Overview of the most sought-after and in-demand tannery jobs*

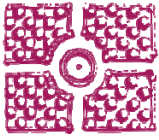
		Job stability	
		Medium-high	Medium-low
Employment capacity (number of newly employed)	Medium-large	Handicraft workers in fabric, leather and related materials	Leather and fur tanners Non-qualified industrial workers and related workers Porters, deliverers and related workers Composite products assemblers Furriers, fur pattern makers and related workers
	Medium-small	Footwear craftsmen and workers, and the like Leather- and fur-products machine operators in large-scale processing and production Tool-makers and related workers Production planning technicians Chemical technicians	Artisan and industrial painters Automated and semi-automated machine-tool operators

*Key professional qualifications, whatever class they belong, are highlighted in bold.

The analysis of recruitment capacity resulted in two occupation groups (medium-large and medium-small), depending on the number of newly employed (larger/smaller than the median value). The analysis of job stability resulted in two occupation groups (medium-high and medium-low), depending on the value of the composite indicator (higher/lower than the median value).

Territorial localization

The map below shows the location of local units in the sector, highlighting the most dynamic firms in terms of turnover rate and number of workers for the period 2007-2011. This graphical representation allows to appreciate the degree of diffusion/concentration of production activities on a regional basis.



The tannery firms

