

# A Workshop on Skills Needs Assessment for the Garments Sector



In Conjunction with

**PRGMEA**



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Message by the Chairman



Punjab Skills Development Fund (PSDF) is gearing up to become a province-wide program supporting Government of Punjab's twin objectives of economic growth and employment generation. To that end, the program is looking to support the skills needs of economic activity with high potential to meet the twin objectives.

Based on soil, climate and irrigation endowments, Pakistan is among the world's top five producers of cotton accounting for 9% of total world output. Putting this to advantage, Pakistan has followed a proactive strategy of textiles-led industrialization. Within textiles, garments manufacturing generates the highest value addition and is the most labor intensive segment. It is also the least energy and capital using activity and thus suits our comparative advantage. It is gratifying that garments (including knitwear) manufacturing is now a significant and growing component of textiles. The value of garment exports has nearly quadrupled from US\$ 1.02 billion in 1990 to US\$ 3.27 billion in 2011-2012. There is consensus in the industry that Pakistan has the potential to substantially increase garments exports in the coming years. This is seen clearly in Pakistan's recent export of denims that has grown at 27% per annum in terms of value exported.

PSDF's support for the skills needs of the garments industry complements Government of Punjab's overall strategy for supporting economic activity that creates well-paying jobs for the citizens. With guidance from the Chief Minister, Punjab, a core committee has been formed to remove the key hurdles faced by the industry. In consultation with the private sector, and based on solid empirical research, the committee has identified the lack of skilled manpower as a major hurdle faced by garments manufacturers. The workshop discussed in this report is an important step in guiding PSDF to design cost effective training programs that help remove this hurdle and thus, along with other critical interventions, enable garments manufacturers to realize their growth and employment generation potential.

Dr Ijaz Nabi  
Chairman Punjab Skills Development Fund (PSDF)



## Introduction

Punjab Skills Development Fund (PSDF) is a section 42 not-for-profit company that finances training delivery in vocational skills. The Fund is sponsored by Government of the Punjab and UK's Department for International Development (DFID). Its coverage currently extends to ten districts: Bahawalpur, Bahawalnagar, Lodhran, Muzaffargarh, Lahore, Faisalabad, Gujranwala, Sargodha, Chiniot and Sheikhpura (four more districts will be added shortly). PSDF follows a competitive model of engagement to purchase training services from a mix of private institutes, public providers and NGOs.

Government of the Punjab has identified the Garments Industry as a potential growth sector that needs a coordinated and well-considered strategy to enable it to benefit from emerging export opportunities. Under the overall supervision and guidance of Dr Ijaz Nabi, Advisor to Government of the Punjab and Mr Irfan Elahi, Chairman Planning and Development Board, a Core Committee and its subservient Working Groups are considering key areas affecting the sector's competitiveness such as energy, transport, market access through GSP-Plus, import and export policies, industrial zone development and human capital, for development of a cohesive and consistent plan of action. All Working Groups report to the overarching Core Committee on Garments which in turn reports to the Chief Minister of Punjab.

Punjab Skills Development Fund takes the lead on the skills sector and is assisted by Pakistan Readymade Garments Association (PRGMEA), Punjab's Technical Education and Vocational Training Authority (TEVTA), Punjab Vocational Training Council (PVTTC) and selected sector experts. Setting the direction for future work, the group decided that any action plan for skills will be based on evidence collected from the industry through consultations and a formal survey which will be part and parcel of PSDF's research agenda, to be pursued in preparation of its expansion to new districts.

The garments and textile sector is Pakistan's major foreign exchange earner (contributing to 60% of total exports) and a significant employer. The garments sector, in particular, contributes relatively more to value-addition and labour absorption compared to the textile sector. In the post-MFA<sup>1</sup> period, Pakistan's garments sector has presented a mixed record: positive growth in the woven segment coupled with knitwear exports lagging behind. Knitwear exports have been in the decline since 2006 with a slight recovery in 2010. Pakistan is the only country which witnessed a decline in its unit prices of knitwear in the European Union in response to competition<sup>2</sup>. Most competing countries responded by quality improvements and new product development. The woven sector fared better and has posted a positive growth rate in unit prices as well as volumes.

Recent increases in Chinese wages<sup>3</sup> have forced importers to look for alternative suppliers. Since labour costs comprise a good 10-20% of total production costs in the garments industry<sup>4</sup>, better worker productivity can lead to improved competitiveness. Quality-related initiatives and adoption of product innovations will also depend on the creativity and adaptability of trained labour force in the garments sector. Therefore, skills features as a major area for action in the overall garments sector work plan.

<sup>1</sup>Multi Fibre Agreement under which major importing countries imposed import quotas.

<sup>2</sup>Dynamics of the Garments Industry in Low Income Countries: Experience of Low Income Countries; IDE-JETRO (2012).

<sup>3</sup>According to a New York Times report, blue collared wages have quadrupled over the last one decade.

<sup>4</sup>Ibid



## Workshop on Skills Needs Assessment for the Garments Sector

A Workshop on Skills Needs Assessment for the Garments Sector, held on 12<sup>th</sup> September, 2013 in Lahore, kickstarted the initiative to address human capital deficiencies in the apparel industry especially at the worker and middle management level. The event brought small, medium-sized and large employers under one roof providing them a forum to articulate and share their skills needs. This information gathered in this event and presented in this report will feed into the development of an action plan for skills development encompassing different elements of the training cycle:



PSDF and the Committee on Skills for the Garments Industry give key importance to the need to engage employers and for them to be at the centre stage of the planned skills initiative to play the following roles:

- Identify what skills are currently needed and what new skills requirements may be anticipated in future;
- Provide an estimate of the target number of trainees for the initiative in the short and long term;
- Provide feedback for development of suitable curricula;
- Develop linkages with training institutes for training, assessment and job matching;
- Act as trainers for on-the-job training; and
- Offer jobs to the trainees and share feedback on their quality.

Employer buy-in of the action plan developed through this consultation and through a formal planned survey will be critical for the success of PSDF's initiative and will require their full participation and support.

The Workshop was organized with the active support of PRGMEA. The programme consisted of a plenary session followed by four breakout sessions in the following five segments:

1. Woven Garments
2. Knitted Garments
3. Sportswear
4. Technical Wear
5. Logistics, Warehousing and International Freight Forwarding

Each of the five sessions was led by an industry expert. A structured short questionnaire containing multiple choice questions was filled in by all participants. Following this, the industry representatives carried out detailed discussions on selected open-ended questions that were shared with them prior to the session.



**Opening Session:**

The opening session was presided over by Mr Almas Hyder, Member, Board of Directors, Punjab Skills Development Fund (PSDF) and Chairman SPEL Group of Industries. Mr Sajid Saleem Minhas, Central Chairman Pakistan Readymade Garments Manufacturers and Exporters Association (PRGMEA) was the Guest of Honour.

Mr Almas Hyder welcomed the participants and thanked them for their interest in engaging with Punjab Skills Development Fund. He explained the principle behind the establishment of PSDF which was to fund trainees rather than training institutes. The primary aim of the Fund was to encourage private sector in the field of vocational training delivery following an output-based payment model. Governments had traditionally funded institutes following input-financing models, which had bred inefficiencies. There was evidence that public funds were not being put to optimal use.

The chair emphasized the possible role of producers and firms as trainers. He explained how PSDF invited expressions of interest from training providers through newspaper advertisements and had recently made firms eligible to apply for funding. Garments producers were urged to make use of these funds by setting up in-plant training institutes. He explained that the Fund paid on the basis of number of trainees trained rather than the capacity created which meant that both the industry and the Fund (which is led by the private sector and financed jointly by the Punjab Government and the UK Government) could be sure of what had been delivered.

Mr Sajid Saleem Minhas, Central Chairman PRGMEA stated that the workshop was a unique opportunity to share views on the subject as leading players of the industry including some pioneers were present. Mr. Minhas touched upon the recent history of the garment industry development in Pakistan.

On the current state of the industry, Mr Minhas emphatically stated that *“what got us here will not get us there”* i.e. Pakistan cannot compete without a radical change in its production philosophy. A window of opportunity was emerging due to the exit of China from the low-end garments sector. China's garments exports amount to \$ 120 billion. This trade can be attracted by countries such as Vietnam, Cambodia, Bangladesh and to some extent by India. In case Pakistan wins GSP-Plus status in the European Union market, competitiveness will be the critical factor for capturing larger market shares.

He called for garments producers and exporters to improve skills of their workers and middle managers which is being supported by the government through PSDF and other schemes. Alongside, companies should also pay attention to the training of their CEOs.

Mr. Minhas pointed out important gaps in workers' skills. For example, he shared that our workers lacked proper care and handling techniques. A garment fallen on the floor will not be picked by a worker unless it is from his/her own lot. Sri Lankan labour force, on the other hand, has better work attitudes on the factory floor which has enabled them to improve their quality and productivity.

The Chief Minister Punjab is taking keen interest in the garments sector which is evident in his personal supervision of the work being pursued by the Core Committee on Garments. The possibilities to open up new road links to Europe was being pursued aggressively and talks with Iran and Turkey are underway. If brought to fruition, better land route options can reduce the lead time of our exporters by 10-15 days which can give us an edge over our competitors. Pakistan can also venture into high fashion products which require shorter lead times and has brief shelf life spans.

Mr. Minhas shared that the Chief Minister had given the industry the ambitious target of overtaking Bangladesh in garments exports and had assured them of his full support. He had high expectations that PRGMEA and its members would do their best and come up to the nation's expectations by adopting better production and marketing techniques and bringing Pakistani products in the same league as that of major, successful exporting countries.



If our efforts to market Pakistan as an alternative to China were successful, existing firms would need to expand and new investments would have to be made. But upsizing from 100 to 200 machines is not an easy task, he emphasized. Growing from a small to medium sized garments producer, needed effective planning and tying up of many loose ends neglected in small set ups. Our target should be setting up a good number of garments exporters employing more than 10,000 workers. In case of grant of GSP-Plus status, this expansion will need to be rapid. We will have very little time to respond and soon the emerging opportunities could as well be water under the bridge, much like the recent EU concessions which could not be utilized in many HS lines.

Mr Ijaz Khokhar, former president PRGMEA appreciated the planned sector survey by PSDF (mentioned in his opening remarks by CEO, PSDF) and suggested that the analysis should be done region-wise as workers' skills needs are different based upon where the garments cluster is located. For examples skills shortages and gaps of Lahore, Faisalabad, Multan and Sialkot were influenced by the kind of industry specialties emerging there. He underscored the need for comprehensive planning by the industry to meet the challenge. A roadmap must be developed by the industry; some government support was required for this as well. What was most needed was better coordination between federal and provincial agencies. He pointed out that the Trade Development Authority of Pakistan (TDAP) must be activated to aggressively market Pakistan in our export destinations.

Mr. Ali Sarfraz, CEO Punjab Skills Development Fund explained the background of the workshop in the context of the work programme outlined by the Core Committee on Garments. He explained the format of the workshop and future plans to conduct a representative study mapping the sector and its skills needs. He assured the participants that their responses to the questionnaire will be strictly confidential and no firm-level information will be shared with entities outside PSDF.

While the questionnaire contained multiple choice questions, the break-out sessions were designed to receive industry input in more detail. Discussion was structured around open-ended questions in Box 1.

**Box 1: OPEN-ENDED QUESTIONS FOR DISCUSSION**

- I. *What sub-sectors are growing or have a definite growth potential? Evidence/cases can be cited.*
- II. *What should be the overall skills training target for the garments industry in Punjab and in your sub-sector?*
- III. *What new trends/ technologies/drivers of change require efforts for skills development of workers?*
- IV. *What are the most needed skills for your sub-sector?*
- V. *What have been successful past examples of vocational training in the industry in Pakistan (this could be from training experience of individual companies, institutes or donors).*
- VI. *Based on your knowledge in the sector, which country's skills qualifications, certification and trainers can be most useful to Pakistan's garments industry? (country, skills to be identified, reason for preference)*
- VII. *What can be employers' contribution (in cash or in kind) for training of workers?*
- VIII. *It is said that vocational training is incomplete without practical experience in the industry. What would be the most appropriate system of providing on-job training to workers under training?*
- IX. *Can employers provide pledges to employ trained workers? If yes, for which skills?*
- X. *What role can PRGMEA play in this initiative?*
- XI. *Can you share any other suggestions to improve the vocational training for skilled workers?*

Discussion that took place on the open-ended questions (Box 1) is summarized below. The group moderators presented their recommendations to the plenary and also responded to comments and queries by those present.



## Break out Session on Skills Needs in the Woven Garments Segment



The group on woven garments had representation from leading companies such as US Denim, Stylers, Nishat Apparel, Sapphire Group etc. It was led by Mr. Muhammad Faisal from Sapphire Finishing Mills and was facilitated by Mr. Ali Sarfraz, CEO PSDF. List of participants of this session is at Annex 1.

**Growth Potential:** Garments of denim and twill fabrics were identified as two strong sectors in the apparel industry. Tops and bottoms were the two main products made out of denim and twill. Within the woven segment, the following areas had high potential for growth:

- Cotton Accessories & Embroideries: Respondents identified the “Embellishment Industry” as an integral and growing part of the garment industry. Some argued that embellishment represent a separate industry but all unanimously agreed that the garment industry is substantially affected by the trends with in this sector.
- Laundry (dry and wet): Most respondents highlighted “dry laundry” as a potential area for growth. They specified that the industry faced skills scarcity particularly within this sector.
- Trims: The area must be developed to reduce dependence on imports.
- Logistics: Firms serving the garments sector must develop new competencies that were being demanded by buyers such as Duty Paid Delivery.

**Skills Training Target:** Assuming the high and low industrial trends, the group members said that the yearly demand for new workers would be in the range of 15,000- 50,000 in the post GSP+ regime. The middle ground was estimated as approximately 30,000. The group emphasized the need to initiate and roll out training programmes to meet the burgeoning demand as a result of new expected orders.

**New Trends or Technologies:** The group discussed that increasing international and national focus on compliance audits had increased the demand for facilities such as Effluent Treatment Plants. Middle management and supervisors could be trained in dealing with compliance aspects of the industry. A new required qualification, MSc Environment, may be designed to meet the needs of the local industry.

The garment sector needed to adapt quickly to changing technological trends, however, industry faced resistance from employees who were reluctant to learn new technologies. Nonetheless, the industry needed to move towards automation. Vocational/skill training in the areas of machinery operation, technical and mechanical skills would be extremely beneficial.

**Most Needed Skills:** At higher skills level, the group identified the need for production managers, mechanical engineers and project developers. Production managers play a key role in changing status-quo oriented attitudes. Mechanical Engineers can familiarize themselves with new technologies and train machine operators. They could also help reduce the cost of business by introducing local versions of imported machinery through reverse engineering and help in overall maintenance of machinery parts. Mechanical engineers will also be able to perform important jobs such as PLC repairing and printed circuit boards. The garment industry faced a dearth of experts who could prepare feasibility reports and cost estimates for a particular project. Project Developers could be guided by industrial experts to design new investment and prepare estimates.

Laboratory testing for product compliance is being done by international firms which increases the businesses costs substantially. If testing skills are developed locally, this will help SME's overcome financial obstacles. Participants mentioned that PCSIR had modern testing equipment. Businesses must be given access to this equipment, or alternatively, incentives be offered for import of laboratory equipment in order to reduce testing costs. PCSIR can use their laboratory staff as master trainers.

<sup>1</sup><http://www.undp.org/content/dam/undp/documents/projects/PAK/00014127/GENPROM-PRODOC.pdf>



It was also highlighted that the garments industry needed Concept Developers. (The term 'concept developer' refers to designers that are in high demand in the garment industry).

Other most needed skills were;

- a) Machine Operators
- b) Textile Machine Mechanics
- c) Mechanical Engineers
- d) Electrical Engineers
- e) Chemical Engineers (for Laundry industry)
- f) Laboratory Testing Technicians

**Successful Past Examples of Skills Training in the Industry:** GENPROM<sup>1</sup> (Gender Promotion in Garment/Clothing industry through skills development, was a Project sponsored by United Nations Development Programme (UNDP). The project started in 2007. Its implementing partners were Pakistan Readymade Garments and Exporters Association for Sindh and Government College University, Faisalabad for Punjab. GEN-PROM training project was successfully implemented in 48 factories across Pakistan at Karachi, Lahore and Faisalabad and trained more than 487 Master Trainers/middle management professionals and 8081 workers. The Project delivered an integrated training/capacity development system including supervised trainings, gap analysis services, course curricula, manuals and consulting guidelines to these factories.

**International Assistance in Training:** The group suggested inviting expertise from Sri Lanka, Italy and Turkey to upgrade local skills, in order of preference.

They preferred Sri Lanka over others due to the fact that the country has had similar industrial culture in the past. However, over the years it had transformed tremendously and had implemented technological advancements. They argued that Sri Lankan trainers and certifications could be most beneficial in introducing and infusing new technology in Pakistan.

Participants mentioned, however, that the garments industry preferred previous employment history and experience over international/national certifications. The garments industry had indigenous training centers and was able to train workers according to their own requirements. Foreign expertise may therefore only be invited for high-end trades.

**Employers Contribution:** Garment producers have traditionally offered OJT to their own inductees. The group was divided on the question of training outsiders or unemployed persons nominated by PSDF. Some showed willingness while others were reluctant due to the possibility of their industrial secrets being leaked out. The respondents also showed willingness for up skilling of their own employees with their contribution in the shape of:

- a) Financial cost sharing or
- b) Sharing of facilities

A few participants opposed the cost sharing proposition for vocational /skills development training of new worker. They feared high employee turn-over after completion of training.

**Pledges to employ trained workers:** 50% of the companies stated that they would employ PSDF trained workers if given the option to select trainees on their own, prior to training.



**Role of the Association:** The members of focus group specified the following roles through which PRGMEA could provide assistance;

- a) PRGMEA must liaison with individual companies in order to identify skills requirement in the industry
- b) PRGMEA must design curriculums and courses according to the international standards
- c) PRGMEA can be involved in training delivery.

**Suggestions:** The following suggestions were given by the group;

- A) Machine-Specific Skills Courses must be designed.
- b) Courses for "Dry Laundry" and "Chemical Wash" must be introduced.
- c) A forum must be designed where PRGMEA and the industry leaders can stay in touch and share information on skills initiatives.
- d) Trainers providing training must possess machine-specific know-how and sufficient practical experience.
- e) Industries must collaborate with training providers and allow their supervisors/skilled employees to provide training to individuals at institutes.





## Break out Session on Skills Needs in the Knitwear Segment



\*HS groups (at four digit level) were used to identify product groups.



The group assigned to discuss the above topic had representation from knitwear units, Pakistan Hosiery Manufacturers Association, Pakistan Knitwear Training Institute, Pakistan School of Fashion Design and Skills International. It was led by Mr. Shehzad Kamboh, (from Al-Wadood Textiles). List of participants is at Annex 1.

A gist of their discussion is as below:

**Growth Potential:** The knitwear sector can be divided into three sub-sectors: knitting, dyeing & printing and stitching. The stitching sub-sector uses three types of fabrics: fleece, single jersey or pique. Fleece is used for sweatshirts, jackets and hoodies; t-shirts use single jersey, while polo shorts are made from pique fabric.

The group was of the view that in order to strategically select leading products, Pakistan should strengthen the areas (such as t-shirts) for which it has available raw materials and a proven track record. Moving to products using finer counts of yarn will be futile as the country does not produce the required inputs and neither are compatible machines owned by producers. This may be a longer term proposition associated with agricultural and industry modernization but was not appropriate for the initial big push.

Areas with faster growth and those with growth potential were identified as:

- 6103<sup>5</sup>: Men's suits, jackets and trousers knitted/crocheted (sweatshirts fall in this category);
- 6105: Men's shirts knitted or crocheted;
- 6110: pullovers, sweaters etc.;
- 6114: Garments knitted or crocheted not elsewhere specified; and
- 6112: Track suits, swimsuits, skiwear etc.

The sector of sweaters and pullovers needs to be developed. Bangladesh is paying specific attention to this area as these products fetch higher prices in the international market. Pakistan has a handful of successful producers of sweaters who use hand operated flat-bed machines and are able to produce at a small scale only for the local market. Despite this, all their supply is rapidly sold in the market. Important names are Cougar and Oxford.

Socks was also an important product which was expanding.

The group shared that upto 50% of the dyeing capacity was being used for fleece. Government should, therefore, target development and promotion of fleece production, this being our strongest sector.

The industry emphasized that there will be a shortage of skilled labour in case the Chinese are attracted to Pakistan as foreign investors. The Garments City should gear for larger units with thousands not hundreds of workers. *The Chinese should also be encouraged to set up industry in textile-related inputs such as nylon fibre which was currently being imported.*

Easy availability of raw material shall facilitate diversification from cotton-only products to products prepared from artificial or mixed fibres.

**Skills Training Targets:** In the medium term (next 2-3 years), the industry can absorb upto 50,000 industrial stitchers and 10,000 other workers. Other workers include machine mechanics, quality inspectors, pattern cutters, etc. The requirement was spelt out only for Punjab based on the existing scenario. The demand was expected to be much higher if Chinese investments materialize.





**New Trends or Technologies:** The industry must shift to automation and installation of *computerized stitching machines*. Different brands are available in the market such as Juki and Yamato. Their manufacturers provide limited after-sales service but do not train operators. As Pakistani operators are not able to handle the sophisticated, computerised machines, these gradually become inoperative or their parts are replaced. As a result they are transformed into manually operated machines in a matter of months. Many producers have suffered losses due to worker inability to operate computerised machines.

A representative of the Pakistan School of Fashion Design (PSFD) informed that Stoll Knitting Machines producing 14 gauge fabric is based on innovative technology; training on these machines must be encouraged. The school had a machine and was able to offer training on it. Some, however, were of the view that the machine suited countries which were facing labour shortages.

A participant pointed out that products made out of Indigo Terry fabric were in trend. 30% of the international demand (tapped from Pakistan) for such products was being met from Faisalabad. The product required specialized knowhow in washing techniques.

**Most Needed Skills:** Most needed skills were:

- Stitchers (in terms of numbers) and
- Machine Mechanics (in terms of quality). In case the industry wanted to make a switch to automation, high quality mechanics will be a critical need.
- The skills of our hand embellishers were very poor with cleanliness as the main concern. Women hand embroiderers, sequins and bead workers must be upskilled for the garments industry. For this they will require a different skills set than that suitable for supplying to the local boutique businesses.

**Successful Past Examples of Skills Training in the Industry:** Three successful examples were cited:

- Ministry of Textile Industry's SMOT (Stitching Machine Operators Training) initiative in which firms established their own training set ups, hired trainers and trained manpower. 50% of the cost was picked up by the government. 80-90% of the trainees found employment immediately. It was observed that there was some leakage from the scheme as a few companies trained their own workers and showed them as new employees. The group was of the view that such occurrences were very low. Up to 10% leakage should be tolerable in any programme. Firms such as K&M, MTN and Sapphire benefited from the scheme.

- More than a decade ago, an NGO trained hand embroiderers for the garments industry who were used by manufacturers for outsourcing their embellishment work. Now even established exporters were reluctant to accept orders for products that had embellishments especially if the fabric was light coloured/white. Embellishers take products to their homes and it comes back in a soiled condition leading to rejection for export purposes.

- Pakistan Knitwear Training Institute is training stitchers and mechanics with PSDF funding. The Institute informed that firms are already waiting for them to graduate and they will be offered jobs immediately.

**International Assistance in Training:** The industry was divided on the issue. In the past, a number of firms had brought in trainers and consultants from Sri Lanka but this did not prove to be a successful experience, in general. Some were of the view that our workers had low education levels and hence a communication gap between foreign trainers and the workers would hamper training effects. Others suggested that foreign assistance should not be ruled out entirely. Foreign expertise from countries such as Sri Lanka could be tapped for supervisory level training, for training of masters trainers for operator level training and for adapting training manuals to local requirements. All training materials especially those developed by TEVTA should be translated in Urdu.



**Employers Contribution:** Employers can contribute by offering their machinery and trainers.

**On-Job Training:** Firms can offer on-job trainings. There was little interest in using the apprenticeship system as majority of workers in the industry were on a piece-rate system. The group recommended a minimum OJT of three months during which the trainee should receive a stipend. During training, trainees should be exposed to the work environment in the sector which features long working hours and difficult conditions. The group emphasized that in the ongoing energy crisis, an air-conditioned environment was not possible in the factory. Trainees must be prepared to face realities.

**Pledges to employ newly trained workers:** Industry representatives said that they were able to offer jobs to newly trained workers subject to a trade test conducted by them. This was required even though they did not disagree with the need for provincial, accredited certification. One participant suggested that they would be more interested in hiring an entire *group* of workers led by a supervisor who should be responsible for HRM and hiring and firing within the group.

**Role of the Association:** Pakistan Hosiery Manufacturers Association (PHMA) was willing to play a coordinating role in finding opportunities for OJT and job placement. PKTI offered training of master trainers and industry workers. Pakistan School of Fashion Design offered that it would be able to design new courses according to the industry's needs.

**Any other suggestions:** The group put forward the following suggestions:

- Developing workplace ethics was very important and should be made part of all vocational training especially for the export sectors.
- Industry and association must be involved in all training initiatives.
- Pakistan should concentrate on its existing strengths and side by side develop new products.
- School-industry relationship is very weak and needs to be strengthened.
- Youth should be attracted towards the sector as operators trained in the 1990s are in their thirties now. The work is physically demanding and therefore, new blood is required to run the machines.
- The group discussed moving from piece-rate to monthly wages but majority were opposed to the suggestion as workload was variable around the year. Three months in particular (Nov-Jan) were particularly lean when even established firms shed their 20-30% workers.
- Employing women operators was not possible without a complete cultural change and improvement in the security situation, as they could not attend night shifts. Some firms reported lower efficiency levels with women workers. Masood Textiles had employed women successfully by moving to one shift only, however, this was an isolated example. Smaller firms seemed unprepared to make the change.
- During discussion in the plenary session, a participant suggested including Indigo Terry fabric as a new and growing sector especially in Faisalabad. This sector required special washing techniques in which skills should be developed.



## Break out Session on Skills Needs in the Technical Wear Segment



Technical wear includes garments which have a specific function and are used at workplace to improve the health and safety of the employees. Examples include firefighting suits, aprons, laboratory coats, gloves, etc. More sophisticated products include technical textiles for automotive applications, medical textiles (implants), geotextiles (reinforcement of embankments), agro textiles (textiles for crop protection), and protective clothing (heat and radiation protection for fire fighter clothing, molten metal protection for welders, stab protection and bulletproof vests, and spacesuits).

The break out session on Technical Wear had representation from a cluster of technical wear firms based at Sialkot. It was led by Mr Zaki Butt from Shami Textiles, Sialkot.

**Growth Potential:** As the world is growing more concerned about the health and safety of employees, the demand for technical wear is on the rise. Due to high demand, this sector is not only growing but has potential to grow even further.

Technical wear can be divided in to two segments

- Work Wears
- Protective Wears

The segment's tremendous potential for growth is untapped by Pakistan. Technical wears are manufactured mainly in Sialkot and that too only by a very few companies. The range of our products is very narrow and feature products such as gloves and socks which also fall under the category of knitwear.

Immi Garments, a company established in Lahore, is an example of a company trying to branch out to other product areas within the technical wear sector. Alongside manufacturing fashion garments they are also producing work wears such as uniforms, lab coats and other medical wears. In functional wears, they are producing clothing such as fire retardant, high visibility, basic twill garments, canvas garments and products made of water repellent materials.

**Skills Training Targets:** Participants of the break out session were of the view that the garments industry can absorb up to 25,000 skilled workers of which up to 5000 can be accommodated in the technical wear sector.

**New Technology:** Automation is the prime driver of change for the skills development sector. Firms are moving from manually operated to computerized stitching machines. This requires better core skills (especially literacy and numeracy) at the operator level and has necessitated up-skilling of existing workers as well. Since workers trained on computerized machines have a better control on product quality, the need for inline checkers will diminish with time.

Also, as new production systems are being adopted by companies the need for workers to be trained in team work, ethics, health & safety is becoming more pronounced.

**Most Demanded Skills:** During the group discussion, participants identified a list of skills which were critical for the industry. Skilled stitchers topped the list with their demand reflecting both quantity and quality. Other skilled workers demanded included quality controllers, supervisors, industrial engineers, merchandisers and import/export officers.

**Successful example of vocational training in industry:** G4DE (Gender Equality for Decent Employment) in collaboration with ILO conducted a focus group for identification of skills required. After successfully identifying such skills they conducted vocational training for candidates who then got well-paying jobs in textile sector.

Interloop, a garment producing company, is another example of on-job vocational training. They enrolled a batch of 30 people and trained them in their factory for a period of two months. After the completion of training they inducted top performers.

According to the group every company should adopt the practice of inducting and training new workers such as stitchers,



CAD/CAM operators and other workers.

**Countries which can benefit Pakistan:** There are few countries which can help Pakistan in developing its garments sector. Some of these countries include.

- **Sri Lanka:** Sri Lankans have developed very sophisticated skills in the garments industry. Both knits and wovens are their areas of strength. Sri Lankan trainers and certifications were highly credible and could help Pakistan train or retrain its workforce in relatively lower costs than other countries.
- **Philippines:** Philippine experts have a very unique skill sets in garments sector. They could also help Pakistan to develop higher value added products.
- **Turkey:** Turkey could be particularly helpful for Pakistani industry since their workforce is trained by Germans who are very well known for their skills.

**Employers Contribution:** The industry contributes 0.25% of export proceeds to an Export Development Fund. This Fund should be utilized more effectively for skills development. For training delivery, companies can set up in-house structures and train workers for the industry. They can also offer internships and apprenticeships as vocational training without practical experience is useless.

**Role of PRGMEA/PRGTTI:** The participants appeared to be cognisant of the training activities of PRGTTI than any other public sector skills provider. They were of the view that PRGTTI's ability to meet the industry's skills needs must be strengthened.

**Suggestions to improve vocational training:** The following suggestions were shared by the group:

- Skills Needs Assessments and training initiatives were needed on a regular basis as they served the purpose of connecting training deliverers with the industry. The two-way exchange was helpful in disseminating information on the available menu of training and communicating industry's needs to the training providers. Regular stakeholder consultations may, therefore, be mandated under the provincial skills policy;
- Pakistan could make use of judiciously selected foreign expertise. Foreign certifications and trainers can be especially helpful, if courses are carefully matched to needs and the ability of trainees to assimilate their content.
- Vocational training institutes need to be modernized to enable them to provide effective trainings according to the industry needs.

## Break out Session on Skills Needs in the Sportswear Segment







The group assigned to discuss the above topic had representation from Kashmir International, Meyer & Company, S.A.U Associates, Talon Sports (Pvt) Limited, Sialkot, HADI Textile, PREGETI-Special Sports, Technical Education & Vocational Training Authority (TEVTA), N. N Export International (Pvt) Ltd, Delux Sports and Ashraf Industries (Pvt) Limited. It was moderated by Mr Sohail Afzal Sheikh, (from LIMTON Pvt Limited). List of participants is in Annex A.

A gist of their discussion is as below:

**Growth Potential:** In the 1970s, athletic sportswear began to evolve from a product line aimed at niche markets into a mainstream fashion product. The clear divisions between performance and fashion, function and style, formal and informal that once existed became increasingly blurred. In the 1980s, the acceptability of casual dress on more occasions paved the way for sportswear to move into the mainstream clothing market. The trend was accompanied by a real increase in sports participation. The sportswear industry, which includes both athletic footwear and apparel (garments), is very labor intensive.

The areas with faster growth and those with growth potential were identified as:

- Training wear; e.g. Football training wear, tracksuits etc.
- Breathable fabricwear i.e. made from stretchable waterproof breathable fabric
- Martial Art wear/ accessories: e.g. Judo Uniform, Karate Uniform, Boxing shorts, Boxing gloves etc
- Children and Ladies Sportswear &
- Special items such as boxing gloves.

Pakistan has a long-established presence in sportswear especially martial arts wear, however, we are struggling to keep pace with new trends.

The group was of the view that Pakistan should continue to strengthen the areas for which it has potential for growth especially the segment of **Martial Arts wear and accessories**. Due to diversification of Chinese manpower to other sectors, buyers of European countries were facing inordinate delay in shipments and increase in prices. Owing to this critical situation, the European importers were shifting their orders to Pakistan. This phenomenon is giving a boost to sportswear exports from Pakistan. Several global multinational companies had shown keen interest in importing sportswear from Sialkot. The group believed that with China moving out of the sportswear segment, a quantum jump in Pakistan's exports may be possible, enhancing tax revenues and creating 20 per cent more jobs in the industry.

Within the segment, focus should also be on enhancing the product line for children's sportswear. With reduction in the family size, customers especially in the OECD markets are ready to spend higher amounts than before on children's sportswear products.

**Skills Training Targets:** The garments industry/sector can absorb up to 50,000 workers in total who may be trained according to needs.

**New Trends or Technologies:** Currently, Pakistan is producing first and second generation sports garments. The need is to produce third and fourth generation garments now. The sportswear sector has traditionally served as a test-bed for everyday clothing as in the past, its new features supporting comfort and functionality were widely adopted by the general clothing sector. (An important trend in the industry is the use of special materials such as breathable fabrics which is expected to move to casual wear soon.) Supporting innovation in this sector, would, therefore, result in spin-offs for the overall garments industry as a whole.

**Most Needed Skills:** Most needed skills for the sector were:

- Garment technologists (in larger numbers and of better quality)
- Stitchers (in larger numbers)
- Middle managers



- Higher managers
- ERP reporting systems
- Operations of High-Tech Machines
- Working in a Chain Production System
- Product Development and Upgrading Capacities

The group was of the view that women workers needed to be trained and recruited by the industry. They felt that there was a mismatch between the output of our technical and vocational trainings institutions and what was needed by the industry. Workforce development in the sportswear sector should focus on three areas: a) training (pre-employment standardized training for new workers and customized industrial training solutions), b) attraction and retention of workers and c) continuous upskilling and lifelong learning. Catalyzing the customized training system may be essential to meet the immediate specialized needs of the industry.

At all levels, workers should be trained in such a way that they become quality-conscious and therefore, separate quality inspectors become redundant.

Training on safety, firefighting and compliance is becoming more and more important with the recent upsurge in reported large scale industrial accidents.

**Successful Past Examples of Skills Training in the Industry:** The participants cited the example of GEN-PROM model/ project, sponsored by United Nations Development Programme (UNDP) and implemented by Pakistan Readymade Garments and Exporters Association for Sindh and Government College University, Faisalabad for Punjab. GEN-PROM hired the services of KSA-Technopak, India (the world renowned experts in the garment/apparel sector) for training and facilitated the local industry in establishing Satellite Training Units (STUs) in close to 50 factories across Pakistan. During these training rounds, 517 Master Trainers and more than 8000 workers, predominately stitching operators, were trained and employed.

**International Assistance in Training:** Experiences of a number of countries were relevant for Pakistan. Examples that could be emulated from these countries were cited as below:

- Efficiency Models from Japan: Japanese companies follow the model of training workers on "efficiency". The group felt that we needed to understand how the same model could be replicated in Pakistan.
- Sri Lanka Sportswear Sector: Sri Lanka had promoted female employment and taken steps to improve worker productivity. As Pakistan is also trying to adopt a similar approach, it is important to draw lessons from the Sri Lankan experience especially in terms of changing the gender composition of workers.
- Korean Sportswear Sector: Most Bangladeshi factories were operated by Korean floor managers who have helped the local industry improve worker efficiency<sup>7</sup>.
- Turkey Garment industry: Workers in the Turkey garment industries were directly trained by German technicians, were highly skilled and operated in the higher value added segment.

**Employers Contribution:** Employers can contribute by offering on-the-job and other professional trainings. The group believed that larger firms can effectively train their own workers and share their training capacities with others. This view was not unanimously shared. The need to protect their trade secrets was one reason cited by the larger firms not willing to share their training capacity.

<sup>7</sup>A Training Institute has been set up at Karachi with the Technical Assistance of Korean Government and is operational since October, 2011.





**On-Job Training:** The group was of the favor that the GEN-PROM model can be adopted for giving on-the-job training. The project basically followed a cascade model of training: master trainers were developed first who in turn provided on-the-job training to unskilled female workers in the area of cutting, stitching, finishing, packing, quality assurance and quality control. Premises of garment companies were used as training sites. The programme was however limited in its reach and only a selected few were able to benefit from it. The absence of external certification of GENPROM trainees was also pointed out.

**Pledges to employ newly trained workers:** Employers were keen to share information on employment opportunities. The

Group emphasised that the industry faced a supply and not a demand-side issue. As working conditions in the industry were tough, trainees graduating from training institutions sometimes ended up in unrelated jobs and sectors which was a waste of resources. Some participants supported the idea of obtaining an undertaking to work in the sector from male and female trainees whenever they were enrolled for any particular training.

The group did not assign much importance to certification. One of the industry representatives said that the *training institutions should be selling skills and not certificates*. In their view, certificates had lost their credibility which needs to be restored. Moreover, the industry representatives suggested that the curriculum designed for the trainees should be industry-related.

**Role of the Association:** Since PRGMEA represented the industry, it should be able to offer its support in the following areas;

- Job placement;
- Self-employment and encouraging workers to start their own business;
- Career counseling in the garments sector; and
- Training of the trainers (TOT).

**Any other suggestions:** The group proposed the following additional recommendations:

- Import-cum-reexport rules should be made more flexible and easy. This recommendation was particularly relevant for the sportswear sector as most of the accessories were shipped over by the buyers.
- The outdated Apprenticeship Ordinance needs to be revised and must incorporate incentives to encourage and engage employers in training provision.
- Stipends for on-job trainees should be at least at the minimum wage level.



## Break out Session on Skills Needs in the Logistics, Warehousing & International Freight Forwarding Segment





Logistics can play a vital role as an enabling factor for the success of any government action plan to stimulate garments exports from Pakistan. Faster, transparent and safer modes of movement of exports can set Pakistan on the international stage as a preferred supplier.

The break out session on Logistics, Warehousing and International Freight Forwarding was led by Mr. Tariq Mahmood Mian of Raaziq International and had representation from leading players in the industry.

A gist of their discussion is as below:

**Growth Potential:** The Logistics Sector has been ignored in the past which is a reason for its very scattered, unorganized and unregulated existence. It has serviced Pakistan's exports in its best capacity and capability but a serious upgrade, policy revision, support and alignment is needed and is the only way forward to enable Pakistan to take advantage of the upcoming market opening opportunities in the garment sector. Regional connectivity will only be possible by developing transport and transit corridors and supporting logistical systems to world's leading economic giants with the stimulating and emerging economies.

World leading brands have shown already their strong interest in sourcing products from Pakistan. Our garments industry is servicing brands such as Bebe, Nike, Prima, Walmart, Mango, Zara, Inditex, Cecil Matalan, OKAIDI, TMG, TESCO, ADDIDAS, LEVIS, Marks and Spencer and JC Penny.

Garments-related logistics faces many issues: industrial clusters are poorly connected with main roads which adds lead time to reach the ports; road and port infrastructure is in poor condition; there is no National Transport Policy; the need for skilled manpower is strongly felt in this sector; and absence of national standardization breeds inefficiencies in transport, storage and shipment processes. The area of logistics requires special attention and sustained support of the Government. Its potential to boost garments exports as a support sector must be recognized and areas of improvement in logistics must be identified.

**New Trends or Technologies:** Process automation was cited as the most important development. Important technologies being introduced to the sector were Radio Frequency Identification (RFID), MOQ (Maximum Order Quantity) and IR etc. Other trends included introduction of environmentally-friendly warehousing, use of battery-operated machines for warehousing and storage, ERP, on-line reporting and procurement and cargo tracking.

Following September 11, 2001 changes in US regulations have required security related certifications/audits. Companies are also obtaining certification by CTPAT (Customs-Trade Partnership Against Terrorism) as evidence of safety of their supply chains.

**Most Needed Skills:** Skills requirements of the logistics workforce identified by the group were in the areas of:

- Supply chain management.
- Commercial knowledge.
- Legal and tax environment.
- Regulations / laws of Land (Rail / Road), Sea/Air freight forwarding regulations.
- DGR/hazardous cargo handling.
- Computer skills
- Written and spoken communication skills
- Interpersonal skills,
- Knowledge of International trade terms and trade issues
- Knowledge of banking and financial issues,
- Insurance.



**Successful Past Examples of Skills Training in the Industry:** In the past, the industry has benefited from trainings offered by international and national entities such as International Air Transport Association (IATA), International Association of Freight Forwarded Association (FIATA), Pakistan International Freight Forwarded Association (PIFFA) and Pakistan Institute of Management (PIM).

**International Assistance in Training:** Skills development is presently being done in a scattered manner; certification remains an issue and trainers with industry-specific knowledge are not available. Trainer training modules and certification of workers should both be developed by consulting European and North American standards where our buyers are located. We must keep in mind all the compliance concerns of our buyers.

For the logistics sector, European and North American expertise is of particular relevance especially in regulatory/legal compliance and security of cargo. CILT (Pakistan) offers qualifications in supply chain management, logistics and transport, ship and port facility security, human resource management, sales and marketing and project management.

**Employers' Contribution:** Companies in the logistics sector must see expenditure on training as an investment. They should be encouraged to organize in-house training sessions. The government may support them in hiring external trainers who can bring in latest industry knowledge and exposure to modern practices.

**On-Job Training:** The industry should be encouraged to offer on-job training to the unemployed who may later be offered permanent positions in the firms. The national association could play an important part in disseminating information about available slots for training.

**Pledges for Employment:** If people are trained following the industry's forecast, their placement will not be problematic. Workers trained in the following areas can be offered employment by existing industry players:

- Quality assurance.
- Driving.
- Sales.
- Logistics operations
- Human resource management.
- International freight forwarding operations.
- Warehousing.

**Role of the Association:** The industry association can engage stakeholders, assist in demand forecasting and disseminate information on training needs and opportunities.

**Any other Suggestions:** The group presented the following additional suggestions:

- Logistics should be taught as a subject in our educational system at the vocational, technical and tertiary levels. Development of expertise at the higher education level will be able to encourage and lead vocational training capacity in the sector.
- A Transport Policy should be adopted at the national level, which will be a potent driver for change on the skills scene.
- Pakistan Land Port Development Authority (PLPDA) should be activated. Their activities shall lead to demand for new and better skills in the industry.
- A sustained effort should be undertaken for assessing skills needs of the industry and shared with the stakeholders.
- Certification of training should be given due importance and possibilities of supporting international certification should be encouraged.



## The Skills Needs Assessment Exercise - Results from the Questionnaire



Participants at the Workshop represented garments producers and their suppliers of different sizes and from different cities in



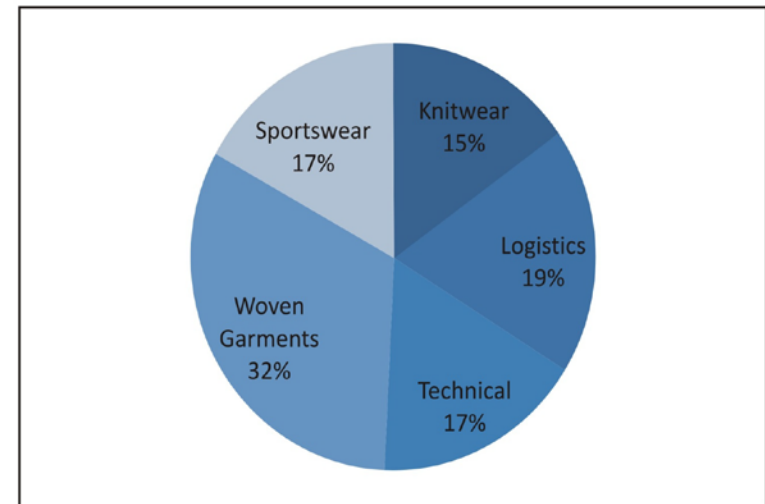
Punjab. Their gathering provided a unique opportunity to obtain further insights from this convenient sample.

A questionnaire was designed with assistance from Pakistan Readymade Garments Manufacturers and Exporters Association (PRGMEA). The intention was to elicit responses to a number of short and multiple-choice questions and also present the view of individual companies which could have been different from the majority in the group discussions held during the workshop.

The quick survey had a response rate of 76% of those present mainly due to the fact that in some cases, a company was represented by more than one individuals and only one filled the questionnaire. The completion rate of the questionnaire was not consistent across different groups representing woven, knitwear, sportswear, technical wear and logistics. Those representing technical institutes were unable to complete the questionnaire as it was designed for employers only.

The survey collated responses from the different segments of the industry: The woven segment had 32% representation while the knitwear, sportswear, technical and logistics sectors had 15%, 17%, 17% and 19% representation, respectively, in the exercise.

Figure 1: Representation of Various Sub-Segments in the Needs Assessment Exercise (%)

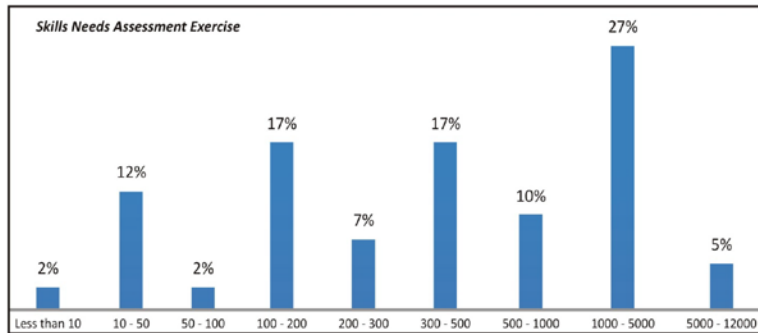


Participants of the exercise were a good balance of firms of different sizes (determined through number of employees): 15% of the firms had less than 100 employees; 41% of the firms had more than 100 but less than 500 employees; 10% had 500 or more but less than 1000 employees. 11 firms had more than 1000 but less than 5000 employees and 2 had more than 5000 employees.





Figure 2: Size Distribution of Firms (by Number of Employees) Participating in the



In terms of turnover, 27% of the participants categorized their firms as small (with small defined as one with annual sales less than Rs 75 million). 40% responded by classifying their firms as medium-sized (i.e. with annual sales more than Rs. 75 million but less than Rs. 400 million) and 33% said that they represented firms with annual sales more than Rs. 400 million.

87% of the firms (excluding those from the logistics sector) stated that they were exporters while the rest replied in the negative. Dyers, processors, embellishers and consultants were amongst those who were not directly exporting but were supporting the export sector.

Participants were asked about the hiring methods that they used for engaging new workers. On average, firms were using two methods out of the ones listed in the questionnaire (These included advertisements, referrals by existing employees, contacting labour contractors, putting up a notice at factory entrance and others). The three most popular recruitment methods were referrals by existing employees, advertisements and putting up notices at factory gates. Fewer firms used labour contractors.

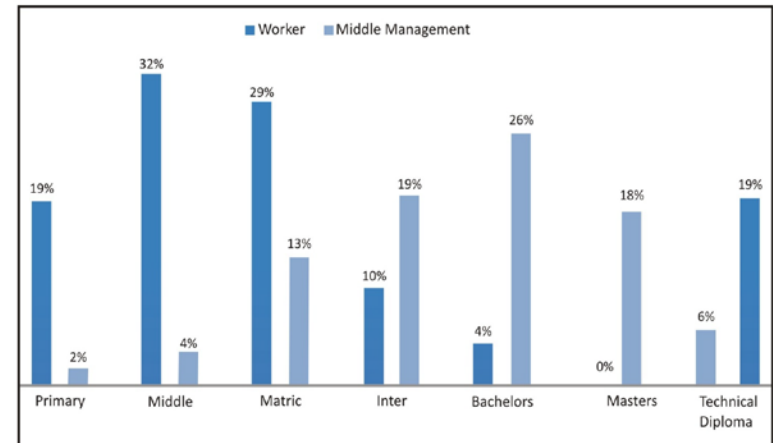
Firms in the woven and knitwear segments hired workers as *helpers, loaders, cutters, dyeing masters, stitching machine operators, assistant operators, machinery mechanics, quality checkers, table checkers, pressmen, store keepers and packers*. Middle managers included *assistant supervisors, line supervisors, shift supervisors, line incharges, yarn officers, assistant managers, dyeing supervisors, finishing masters/supervisors, design associates, pattern masters, store incharges, cutting incharges/supervisors, quality, assistants, quality supervisors and maintenance incharges/chief mechanics*. The requirement of finishing companies was much different. Their workers included *washing operators, hydro operators, boiler operators and quality checkers*. *Merchandising companies reported hiring merchandisers, quality checkers, packers and export officers*.

*In addition to stitchers/operators and traditional skills required in the garments sector, the technical wear segment reported hiring sample developers and operators of special machines.*

The logistics segment hired *operators, helpers, documentation officers and loaders at the worker level*. At the middle management level, such companies hired *sales, marketing quality control supervisors and managers*.



Figure 3: Percentage of Firms Hiring Workers With Certain Academic Qualifications (Firms were allowed to choose more than one option).



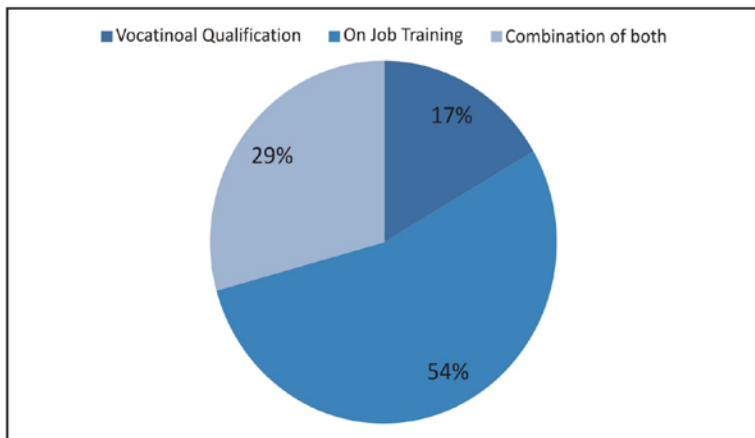
In general, firms were found to be hiring both workers and middle managers with varying levels of education. 62% of the firms were hiring workers at different levels of education (such as primary, middle, matric and intermediate); 38% specified one qualification (mostly matriculation) for hiring workers. 61% of the firms included in the exercise, hired workers who had completed middle or matriculation. Even though the companies were located in urban areas, a good number of companies (19% of the firms) were hiring workers who had only completed primary schooling (in addition to workers with higher levels of completed schooling).

More firms were found to be hiring one or more middle level managers with bachelors qualification than a technical diploma; the reason may be due to shortage of technical diploma holders, a preference for self-trained manager or higher wage expectations. 32% of the firms had filled one or more supervisory level positions with individuals who had completed intermediate or matriculation. 19% of the firms had one or more middle managers with a technical diploma.



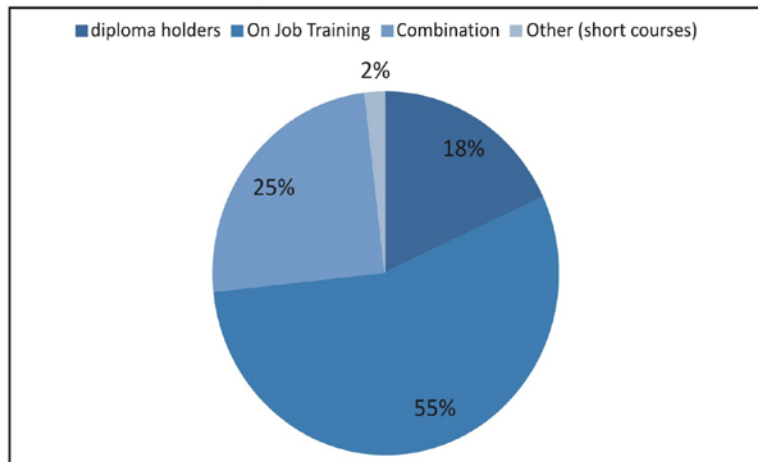


Figure 4: Training Status of Existing Workers (Percentage of firms reporting vocational qualification, on job training or a combination of both as the method through which existing workers were trained).



Majority (55%) of the firms surveyed reported that they trained workers on-job; 17% stated that their workers were trained through a formal qualifications. 29% stated that their workforce was trained using a combination of OJT and a vocational qualification.

Figure 5: Training Status of Existing Middle Managers (Percentage of firms reporting technical qualification, on job training, short courses or a combination of three as the method through which existing workers were trained).



55% of the firms stated that one or more of their middle managers held a technical diploma; 27% of the firms had trained one or more of their middle managers on job; while 18% had middle managers trained through both methods. The fact that there were very little short duration courses available especially for the middle managers was evident by only 2% (only one firm) of the firms reporting having used these to train one or more of their middle managers. This firm belonged to the logistics sector and had middle managers trained through national and international trainers. This points towards the absence of short duration training solutions for middle managers in the garments and logistics sectors.

Firms were asked about the reason why they thought vocational and technical qualification holders were poorly prepared for jobs in their firm. 36% of the firms were of the view that one of the reasons workers were unprepared was due to their poor attitudes. 27% and 20% respectively, were of the opinion that lack of practical knowledge and being trained on obsolete machines were important reasons for worker unpreparedness. 15% of the firms held the view (amongst other reasons) that workers were unprepared due to poor literacy and numeracy skills.

Figure 6: Why are TVET qualification holders unprepared for worker level jobs in your firm? (Firms were allowed to choose more than one option)

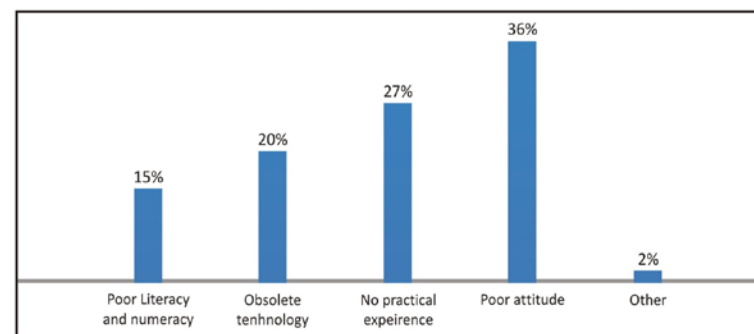
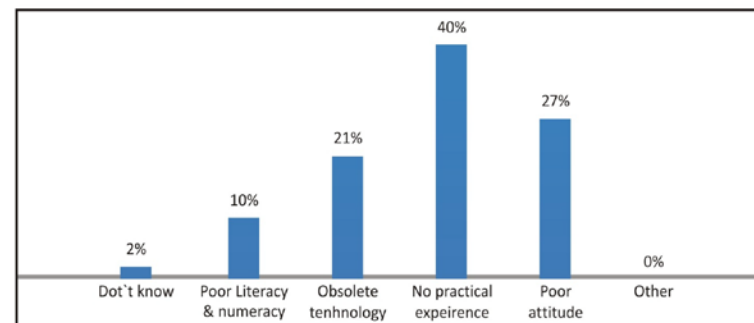


Figure 6: Why are TVET qualification holders unprepared for middle management level jobs in your firms? (Firms were allowed to choose more than one option)

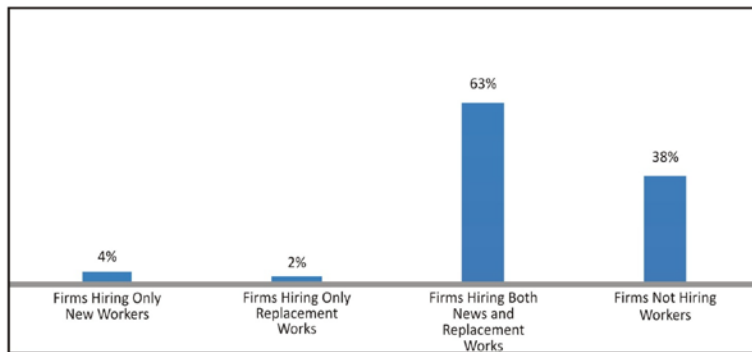




Firms were more concerned about lack of practical experience at the middle management level, as perhaps they had the ability to train workers on the job but not middle managers. Middle managers were fewer in number and therefore, their in-house training was either difficult to arrange without disrupting production or costlier. 27% of the firms stated that one of the reasons TVET qualification holders were unprepared for the world of work was their poor attitudes towards work.

69% of the firms hired one or more staff members at worker level last year. Out of these, 3% (2% of total) hired only replacement workers; 6% (4% of total) reported having hired only new workers and a majority, i.e. 91% (63% of total) had hired both new and replacement workers.

Figure 6: Worker Hiring Status of Firms last Year (%)



Very few firms were hiring new workers only. Replacing existing workers as well as hiring new ones seemed to be a constant activity in firms that were hiring. One of the reasons for high turnover was the nature of business activity in the garment sector - a fact which was brought up in the workshop discussions. In most firms, work was order-based and therefore, of a seasonal nature. Workers were hired as contractual employees or on a piece-rate basis with their number depending on the volume of work orders received during summer time. If a firm received little business, it would not hire and even shed workers during the production season. December to February was the lean period. Rehiring again started in March/April. There was, however, evidence of firms, especially large ones, expanding their size and hiring a significant number of new workers.

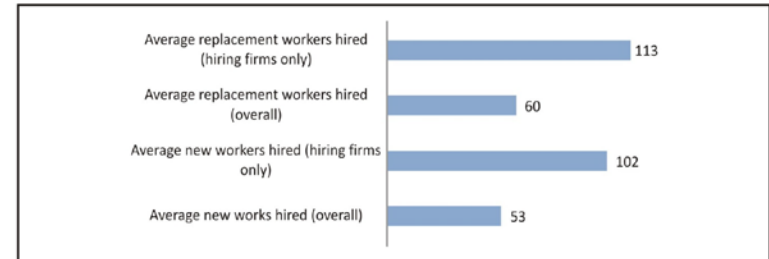
Firms represented in the workshop reported hiring close to 2500 workers last year. On average, the hiring firms added 102 new workers to their team. A total number of 2706 workers were hired as replacement with the hiring firms engaging on average 113 replacement workers.

Including firms that reported no hiring last year, the average number of workers hired per firm drops by almost half for both new as well as replacement workers (i.e. to 53 per firm).

What is important to note that the average number of workers hired as replacement is slightly higher than the average number of new workers hired. PSDF's detailed survey will be able to understand the dynamics of hiring in more detail, as we are not sure whether firms hiring in busy season are engaging new workers merely to reach the firm size in the previous season or are actually expanding. Nevertheless, high worker turnover in the garments industry seems to be affected by the seasonal hiring phenomenon in the sector.



Figure 7: Average Number of Workers Hired Last Year



Firms were asked about current vacancies that they had. 54% of the firms participating in the needs assessment exercise reported that they had worker level vacancies at the time of the workshop; 33% reported having middle management level vacancies at the same time. More than 1000 worker level vacancies and more than 90 middle management level vacancies were identified by the firms represented in the workshop.

**Firms Reporting Current Vacancies:**  
Average number of worker level vacancies is 46 amongst those who reported having vacancies.  
Average number of middle management level vacancies is 4.5.

75% of the firms were willing to hire women as workers/operators. A slightly lower percentage (i.e. 60%) was ready to hire women as middle level managers. If we exclude firms from the logistics sector, willingness to hire women as workers and middle level managers remains roughly the same. (i.e. 73% and 58%, respectively).

A hard-to-fill vacancy is one that an employer struggles to fill either due to shortage of workers holding the required qualification or experience or due to push factors in the workplace such as low wages. For garments producers, vacancies for cutters, markers and stitchers were hard-to-fill while for the logistics firms, skilled drivers, transport managers, warehouse managers and sales staff were difficult to recruit. From the employers' point of view, the most important reason for difficulty in recruiting against the above positions was the lack of experience by the applicants followed by lack of appropriate qualifications though to a lesser extent.

At the middle management level, positions for production supervisors, merchandisers, industrial engineers and sampling, cutting incharges, export managers and operations manager (logistics) were hard to fill. At the middle management level, lack of experience as well as of appropriate qualifications were both significant reasons for difficulty in hiring suitable people.

Firms were asked what additional skills they required from workers and middle level managers. The list included training on work ethics, literacy (Urdu and English), safety, computer skills, communication skills and ability to work as a team.

The responses were slightly different for workers and middle managers.

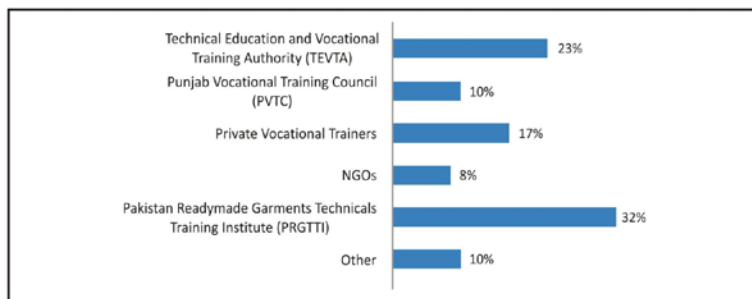


Ranking of Soft Skills for Worker	Rank	Ranking of Soft Skills for Middle Manager	Rank
Teamwork	1	English Literacy	1
Work ethics	2	Teamwork	1
Urdu literacy	3	Work ethics	3
Safety	4	Computer skills	5
Egnlish literacy	5	Communication skills	5
Communication skills	6	Numeracy	6
Computer skills	7	Safety	7
Numeracy	8	Urdu Literacy	8

Teamwork and work ethics ranked amongst the top three for both types of jobs. English literacy was however, the most important additional or soft skill required from the middle level managers.

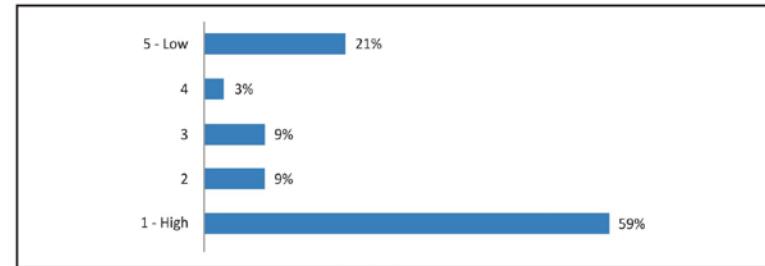
Firms were asked about their preference for training institutes that offered technical and vocational training. 32% preferred Pakistan Readymade Garments Technical Training Institute, as one of training institutes where they would like their workers/middle managers to be trained from; the same percentage was 23% for TEVTA, 17% for private institutes, 9% for PVTC and 8% for NGOs. Firms belonging to the logistics sectors preferred trainers such as PIFFA and IATA; some reported their own training institutes and a few expressed preference for trainers in supply chain management.

Figure 8: Relative Preference for Training Institutes (Percentage of firms expressing preference)



50% of the firms reported having information about the training courses being offered by providers/institutes while the same percentage had no knowledge about the menu being offered by them.

Figure 9: Preference for International Certification (Percentage of firms expressing preference)



Firms were asked to rank their preference for international certification on a scale of one to five, with one representing high preference and 5 standing for low preferences. Majority of the participants preferred international certification. 21% however assigned low value to it.

When asked about how they trained their existing worker, majority responded that they either assigned a trainer or a supervisor to conduct on the job training of the worker or provided structured on the job training by pulling workers off from production for a limited time.

93% felt the need to train their existing worker. The areas for upskilling identified by the woven garments producers were *work ethics, machine operation, denim washing, dry laundry, production house management, maintenance, pattern cutting and product development*. Knitwear producers also pointed out the need for in-service training in the areas of *stitching, pattern making, cutting, dyeing, lab technology, communication, work ethics and merchandising*. Sportswear companies identified *cutting and stitching* as important skills which their existing workers needed to reinforce their skills. For technical wear producers, workers required training in *CAD (computer aided design), industrial engineering, production management, stitching, product development, product knowledge and pressing*. The logistics companies felt the need to train their existing workers in *handling of DGR/hazardous materials, customer care, communication skills, inspection, warehousing, freight forwarding and road transport*.

66% of the respondents favoured training spanning over four weeks or less than that for their current workers. 78% of the firms were willing to co-finance training of their own workers. 90% of the firms were ready to pay salaries of workers during the training period.

Participants of the exercise were asked about their willingness to train a few unemployed peoples. 66% of the firms expressed willingness to train unemployed in their factories and identified the skill in which they could do so. 68% said they will be willing to offer on-job training places for the unemployed in their firms, as below

- Industrial Engineering, Project Planning and Management (6),
- Quality Control (5)
- Merchandizing (4),
- Stitcher (4),
- Ethics and Efficiency (3)
- Stitching Machine Mechanics (2)
- Washing and Special Effects (2),
- Fashion wear (1)
- Production Supervisors (1),
- Health and Safety (1),



- Hand Embroidery for Knitwear (1),
- Dyeing Technician (1),
- Communication (1),
- Soft skills training (1).

Companies demanded new courses in the following areas: *industrial engineering, merchandizing management, quality control, stitching supervisors, efficiency at work, hand embroidery for knitwear, dyeing lab technicians, health and safety, denim washing and denim special effects, project planning communication, wet and dry laundry, production control, and costing.* Despite technical institutes offering courses on stitchers and stitching machine mechanics, a demand for new courses in this area either depicts dissatisfaction with the content of existing one or simply a lack of knowledge.

Firms were asked about their demand for workers holding qualifications available in the training market. Forty different garments-related qualifications are available. These are awarded by the Punjab Board of Technical Education, City and Guilds, Punjab Vocational Training Council and Pakistan Readymade Garments Technical Training Institute. The first two are accredited awarders.

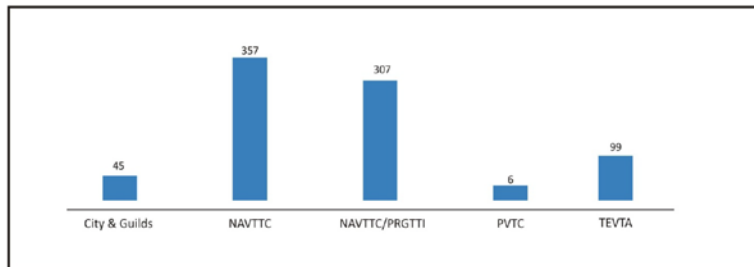
(In case there were a one-to-one correspondence between skills required of workers and available qualifications, response to the above question would be sufficient to map the skills in demand. However, this is not the case. Workers demanded are required to hold some of the indicated qualifications as well as ones that need to be developed).

Firms revealed their preference for qualifications developed by the National Vocational and Technical Training Commission (NAVTTTC) followed by those developed by NAVTTTC and PRGTTI jointly and TEVTA.

It may be mentioned that NAVTTTC courses are not being offered widely such as in TEVTA or PVTC training institutes in Punjab. The courses have been developed recently and no information is available on the availability of trainers to run these courses in training institutes. Pakistan Readymade Garments Technical Training Institute (PRGTTI) is offering its courses developed with assistance from NAVTTTC and ILO but has very limited numerical capacity. Its principal informed PSDF that 100% of the trainees are already booked by companies. The institute, with its current capacity, is unable to meet the industry requirements.

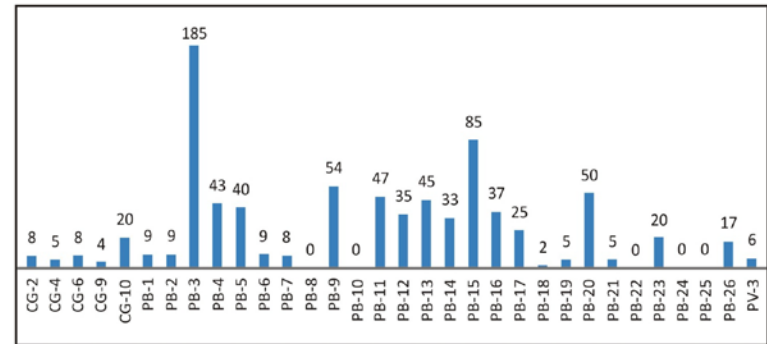
Low preference for TEVTA courses is probably due to low familiarity of the industry with the courses being offered by it which is lower still in the case of PVTC. It could also indicate a low level of confidence in these institutes or their outdated curricula. City and Guilds is offering its garments related qualifications in Pakistan and plans to approve training centres for their delivery.

**Figure 10: Number of Firms Demanding Qualifications Developed by Different Agencies**



The demand for specified courses is depicted in the following figure.

**Figure 11: Preference for Garments Related Qualifications (Number of firms demanding a qualification)**



**Key:**

Prefixes of course codes represent the following organisations:

CG = City and Guilds, UK

PB = Courses developed/notified by the public sector i.e. TEVTA (Punjab), National Vocational and Technical Training Commission (NAVTTTC) or Pakistan Readymade Garments Technical Training Institute (PRGTTI) which can be tested by the Punjab Board of Technical Education (PBTE). Courses PB-1 to PB-10 have been developed by NAVTTTC; Courses PB-11 to PB-17 have been developed by PRGTTI in collaboration with NAVTTTC; and PB-18 to PB-26 are courses developed by TEVTA, Punjab.

PV = Course developed and tested by Punjab Vocational Training Council (PVTC)

CG-2=Pattern Cutting ( Level 2 certificate),CG-4=Silk Painting ( Level 2 certificate),CG-6=Creative Computing, (Level 2 certificate), CG-9=Hand Embroidery (Level 3 certificate),CG-10=Machine Embroidery (Level 3 certificate), PB-1=Fashion and Design, PB-2=Fashion Designing, PB-3=Industrial Stitching, Machine Operator, PB-4=Stitching Machine Mechanic, PB-5=Knitting Machine Operator, PB-6=Knitting Machine Mechanic, PB-7=Pattern Drafting and Cutting, PB-8=Machine and Hand Embroidery, PB-9=Quality Control in Garments, PB-10=Sportswear Stitching, PB-11=Merchandising Management Techniques, PB-12=Production Planning and Control, PB-13=CAD/CAM Computerized Pattern Designing, PB-14=Industrial Engineering, PB-15=Import Export Procedures and Documentations, PB-16=Pattern Drafting and Grading, PB-17=Apparel Supervisor, PB-18=Fabric Cutting Expert (TEVTA), PB-19=Fabric Inspector (TEVTA) , PB-20=Knitting Machine Operator(TEVTA), PB-21=Machine Embroidery(TEVTA), PB-22=Industrial Stitching Machine Operator (TEVTA), PB-23=Industrial Stitching Machine Operator (TEVTA), PB-24=Fashion Designing (TEVTA), PB-25=Patternmaking and Cutting (TEVTA), PB-26=Quality Control in Garments(TEVTA), PV-3=Compute Pattern Designing





## Analysis and the Way Forward:

The outcome of consultations held with the garments sector of Punjab, both through a structured questionnaire and discussions in the workshop, provided a reliable basis for Punjab Skills Development Fund to develop its short term roadmap for skilling workers for the industry.

The garments industry today stands at crossroads: there can be many scenarios some of which are more probable than others. Industry leaders share the expectation that China will move out of low-end high volume clothing trade opening up new markets for second and third tier supplying countries including Pakistan. Other opportunities could emerge following grant of GSP-Plus status to Pakistan and opening up of a land route reducing lead times for supply to Europe.

Skills development of our existing and new workers will be a critical step in improving our competitiveness in the international trading environment. The existing work force trained in the 1990s is ageing and new workers are not as well-trained as the ones they are expected to replace. Pakistan's industry does not have access to a pool of trained workers and current reliance is increasingly on self-trained workers.

New technologies and trends are necessitating acquisition of better skills by our workers. Some skills are needed in greater numbers than others while in others, quality of the skills imparted is of utmost importance. In certain skills areas, shortages are already emerging and are being pointed out by the industry. The supply response is insufficient and is meeting the needs of a few firms.

Almost all industries consulted in the workshop identified the need for **trained industrial stitchers**. This was definitely a skill shortage area as worker poaching was being reported. But the need was expressed not just in quantitative but also in qualitative terms. Many participants stressed on the need to build the capacity of operators to upgrade from manual to computerized stitching machines. They stated that our labour was unfamiliar with automated computerised machines. Labour mishandling of these sophisticated machines was responsible for reducing these to their cheaper manual alternatives in about a year's time.

The need for automation also popped up time and again during the discussion on the need for **Machinery mechanics**, who are also required in significant numbers. Quality of training was very important in this area and some firms also underscored the need for machine-specific courses<sup>8</sup>.

With international buyers becoming increasingly quality conscious, firms have to move towards better production methods to reduce wastages and improve quality of the end product. Quality inspectors were, therefore, demanded in moderate numbers. Cutters, patternmakers and embroiderers were also in demand but to a lesser extent.

The industry lamented the absence of **linkages between training institutes** and themselves. Designers being produced by the universities and institutes were considered more suited for the local/national boutique scene rather than for the export market. Instead of developing products for international buyers, the local industry was basically a CMT (cut, make and trim) industry based on designs communicated by buyers. The industry needed to pay specific attention to product development and attune local designers and producers to the higher value added proposition of combining design and product services.

Apart from basic worker level skills, more specialized skills are absent from the current menu offered by training providers. These skills are not demanded in numbers as high as operators but still are critical for the industry's development. **Dyeing laboratory technicians, denim washing and finishing technicians, hand embroiderers for the formal garments exporters, finishing machine operators and dry laundry experts** were cited as areas for which new, specialized courses were required. In middle to high level skills, designers (concept developers), merchandisers, mechanical engineers, production planners



were required.

Garments producers are demanding new services from logistical companies operating in Pakistan, such as Duty Paid Delivery (DPD). This trend will require skills specific to export documentation, duty/VAT payment in the destination country and fulfilling other legal compliance issues which were in normal cases handled by the buyers. Our garments industry, therefore, needs to develop the expertise for **full-service suppliers** and skills will need to be developed accordingly.

Apart from the need to skill new workers, the industry also feels the need for customized training solutions. Each industry faced its own set of problems based on its production systems and products. These needs were not being met by standardised training packages. The industry, therefore, recommended that the **customized training market** should be catalyzed to meet the skills gaps of their current employees including executive and middle management level officers.

The garments industry has a good appetite for quality training and the need for quality was emphasized in all groups. At the same time, the demand for certification was not strong among the specific group mainly comprising of smaller ones. An interesting comment by the Sportswear Group was that **"training institutions should be selling skills and not certificates"**. The industry when asked about successful training examples, named a few specific interventions funded by international agencies rather than TEVTA/PVTC. It appears that provincial vocational training certificate have lost their value as signifiers of quality training which perhaps explains the rejection of the need for external testing and certification. Certification appears to have been supplanted by reputation backed by collective industry experience. (i.e. a donor agency had implemented a training programme with the help of international experts and has resulted in positive feedback of the industry. The fact that the training was being implemented by the donor agency and had been tried by large exporters signalled quality instead of the same role being played by a credible certification system).

Though it is not this agency's mandate to push for wages instead of piece rate workers and preferring female to male operators, the industry view on the subject remained mixed with both positive and negative examples being cited.

Industry's critique on the lack of communication between technical and vocational schools and firms was voiced repeatedly and a suggestion was made to develop a forum for active exchange between the two sides. It may be feasible to develop a training information exchange facility under PRGMEA to bridge the information gap between training institutes and the industry.

(This report was authored by Sarah Saeed, Skills Strategy Advisor PEOP with contributions from Mr. Ehsan Shehzad, Ms. Palvisha Farooq, Ms. Azka Munir, Ms. Hira Naz and Mr Usman Khan from Punjab Skills Development Fund).



## Annex 1: Break Out Sessions

## Composition of the Break Out Session on Woven Garments

Led by: Ms. Syeda Tauqeer Batool (PRGTTI)

Facilitated by: Mr. Ai Sarfraz, CEO, PSDF

Sr. No.	Name	Organization
1	Mr. Muhammad Saadat Ullah	BHS Apparel
2	Mr. Waseem Akhtar Khan	Cotton Web (Pvt) Ltd.
3	Mr. Sajid Saleem Minhas	Delta Garments.
4	Mr. Tariq Hameed	Delta Garments.
5	Mr. Murtaza Hameed	Delta Garments Ltd.
6	Mr. M. Shahid Ashraf	H. Sheikh Noor Din & Sons
7	Mr. Imran Anwar	Hadi Textile
8	Mr. Anser Naseer Butt	Hall Mark Apparel
9	Mr. Danish Jabbar Khan	Kaarvan Craft
10	Mr. Mubeen Mirza	Merchandiser
11	Mr. Zakir Hussain	Nishat Apparel
12	Mr. M. Ibrahim Sabir	Paramount Spinning Mills
13	Mr. Jamshed Hanif	Garments (Pvt) Ltd.
14	Ms. Syeda Tauqeer Batool	PRGTTI
15	Ms. Saba	PRGTTI
16	Mr. Abdul Sattar	PRGTTI
17	Mr. Maqsood-ul-Hassan	Saftex (Pvt) Ltd.
18	Mr. M. Faisal	Sapphire Finishing Mills Limited (Garment Division)
19	Mr. Tusharah	Sapphire Finishing Mills Ltd.
20	Mr. Altamash Fayyaz	Shadman Cotton Mills
21	Ms. Farhat Majeed	STEP (Institute of Professional Development)
22	Mr. Arham Sultan	STEP (Institute of Professional Development)
23	Mr. Nauman Akram	Style Textile
24	Ms. Zubia Khan	Style Textile
25	Mr. Javed Iqbal Bhatti	Stylers Int'l. (Pvt) Ltd.
26	Mr. Arif	US Apparel
27	Mian Rashid Mehmood	US Denim Mills
28	Ms. Hina Sheikh	International Growth Center

## Composition of the Break Out Session on Knitwear

Led by: Mr. Shehzad Kamboh, (from Al-Wadood Textiles)

Facilitated by: Sarah Saeed, Skills Strategy Advisor, PEOP

Sr. No.	Name	Organization
1	Mr Habib-ur-Rehman	Kamal Hosiery Mills
2	Dr Muhammad Mushtaq Mangat	Modern Fabrics, Leisure Textiles
3	Mr Usman Jawwad	R-Usman Enterprises
4	Mr Rizwan Altaf	Globe Merchandising Solutions
5	Mr. M. Wasim Safdar	Kay and Emms, Private Limited.
6	Mr. Nauman Akram	Style Textiles
7	Shafiah Afzal Aziz	Skills International
8	Talha Ahmad	Pakistan Institute of Fashion and Design
9	Talal Khan	Pakistan Institute of Fashion and Design
10	Tayyab Mir	Pakistan Knitwear Training Institute
11	Muhammad Ayub	Pakistan Hosiery Manufacturers Association

## Composition of the Break Out Session on Technical Wear

Led by: Mr. Zaki-ul-Hassan Zaki

Facilitated by: Mr Ehsan Shehzad, Assistant Manager PSDF

Sr. No.	Name	Organization
1	Mr. Imran Sadiq	Interloop Ltd. HD-03
2	Mr. Ahssan Siddique	Gulistan Parmount (Su)
3	Mr. Muhammad Arif	US Apparel&Textile
4	Mr. Zaka-ul-Hassan-Zaki	Shami textile
5	Mr. Muhammad Aslam	Pakistan Institute of Fashion Design
6	Mr. Hafiz Abdul Karim	Ambition Apparel
7	Mr. Zubair Masud	Interloop Ltd.
8	Mr. Adnan Zaka	Interloop Ltd.
9	Mr. Akbar Shah	IKIZI FASHION



## Annex 2: Workshop Highlights

## Composition of the Break Out Session on Sportswear

**Led by:** Mr Sohail Afzal Shiekh, LIMTON

**Facilitated by:** Mr Aftab Ahmad, Manager Technical, PSDF

Sr. No.	Name	Organization
1	Sheikh Muhammad Saleem	N.N Export international (Pvt) Ltd
2	Mushtaq Ahmed Butt	Proprietor, Kashmiri International
3	Sohail Afzal	Limton (Pvt) Ltd
4	Mir Muhammad Farooq Meher	Meyer & Company
5	Adnan Azmat	SAU Associate
6	Mudasar Baryar	Talon Sports Pvt
7	Ahmed Hussain	Special Sports
8	Ijaz Kokhar	Ashraf Industry
9	Sohail Ashraf	Delux Sports

## Composition of the Break Out Session on Logistics, Warehousing and International Freight Forwarding

**Led by:** Mr. Tariq Mahmood Mian, Raaziq International

**Facilitated by:** Ms. Palvisha Farooq, PSDF

Sr. No.	Name	Organization
1	Mr. Tariq Mahmood Mian	Raaziq International
2	Mr. Muhammad Tauqir Malik	Bin Qutab International
3	Mr. Saleem Shazad Mirza	RIL Logistics
4	Mr. Babar Nazir	Dawood Lawrence Ltd
5	Mr. Mirza Jahanzab Baig	Wagoners Worldwide Pvt Ltd
6	Mr. Khuram Shazad	Lawrencepur
7	Mr. Mobeen Mirza	Source International Pvt Ltd
8	Mr. Muhammad Shahid Ashraf	H.Sheikh Noor-ul-Din & sons
9	Mr. Gazanfar Iqbal Tahar	Sach International Pvt. Ltd
10	Mr. Atif Zaheer, QA.Manager	Source Line International



**Mr Almas Hyder**  
Director Punjab Skills Development Fund/ Chairman SPEL Group, explains PSDF's raison d'etre



**Mr. Sajid Saleem Minhas**  
President PRGMEA outlines the challenges that the industry faces today.



**Mr. Ali Sarfraz**  
CEO PSDF describes the workshop objective and its structure



**Mr. Kamran Yousaf Sandhu**  
Project Director / Principal, PRGTTI





The Technical Wear Group deliberates and consolidates its recommendations



Employers from the Sports Wear Segment discuss the questions posed to them.



Participants filling the questionnaire.

### ANNEX 3: Short Questionnaire

ORGANISED BY



PARTNER



FUNDED BY



## Skills Needs Assessment - Garments Sector Short Questionnaire

NOTE: This information will be kept confidential and will ONLY be used for designing PSDF Schemes. It will not be shared with any government or other entity. Please fill in the questionnaire below using capital letters. In multiple choice questions, put a X against one or more relevant choices.

1	Name:	Job Title:
2	Name of Company / Organization:	
3	Full Address:	
4	Telephone No:	Fax:
5	Email:	Web:
6	Which sub-sector does your company represent within the Garments Sector? <input type="checkbox"/> Knitwear <input type="checkbox"/> Woven Garments (General) <input type="checkbox"/> Woven Garments (denim) <input type="checkbox"/> Hosiery <input type="checkbox"/> Sportswear <input type="checkbox"/> Technical Wear <input type="checkbox"/> Warehousing & International Freight Forwarding Any other: _____	
7	When was your factory company established (Year)? _____	
8	Kindly indicate Sub-departments of your company:	



Purchase     Knitting    Weaving    Dyeing/Processing     Design  
 Cutting     Stitching     Embroidery/Embellishment     Washing  
 Inspection and Quality    Packing    Maintenance     R &D  
 Marketing and Sales    HR and administration    Warehousing    Freight Forwarding  
 Other Departments: \_\_\_\_\_

9 What is the number of your employees? \_\_\_\_\_

10 In which category does your factory/company fall?  
 Small                                       Medium                                       Large  
**Small:** Annual Sales less than Rs 75 million  
**Medium:** Annual Sales more than Rs 75 million but less than Rs. 400 million  
**Large:** Annual Sales more than Rs. 400 million

11 Are you an exporter? \_\_\_\_\_ Yes/No

12 What methods do you employ for hiring workers?  
 Advertisements  
 Referrals by existing employees  
 Contact Labour contractors  
 Notice at factory entrance  
 Any other method \_\_\_\_\_

13 What are the job titles of your employees at middle management and worker level?  
 13A: Middle Management Level (finishing incharge, shift supervisor etc)  


 13B: Worker/Operator Level (such as stitcher, checker, packer):  


14 What academic qualification are required to apply for a job in your company?  
**14A: MIDDLE MANAGEMENT LEVEL**  
 Primary    Middle     Matriculation    Intermediate    Bachelors



Masters     Technical Deploma (DAE) Other \_\_\_\_\_  
**14B: WORKER OR OPERATOR LEVEL**  
 Primary    Middle    Matriculation    Intermediate    Bachelors  
 Masters    Technical Diploma (DAE) Other: \_\_\_\_\_

15 What is the existing training status of majority of your employees?

Worker Level	Middle Management Level
Vocational certificate holder (from TEVTA, PVTC, PRGTI or other vocational institute)	Diploma Holder (fro TEVTA, PRGTI or other technical institute)
Trained on job	Trained on job
A combination of both	A combination of both
Other	Other
None	None

16 In what way are vocational<sup>9</sup> and technical<sup>10</sup> qualification holders poorly prepared for jobs in your company?

Worker Level	Middle management Level
Don't know	Don't know
Poor literacy an numeracy skills	Poor literacy an numeracy skills
Obsolete technical knowledge	Obsolete technical knowledge
No practical experience	No practical experience
Poor attitude (work ethics, lack of punctuality, Cleanliness, etc)	Poor attitude (work ethics, lack of punctuality, Cleanliness, etc)
Other _____	Other _____

17 Which type of workers did you hire during the last one year (state job titles out of the ones that you used in Q13) and how many?

Worker Level (Job Titles)	Number hired as Replacement <sup>11</sup>	Number hired at New Jobs <sup>12</sup>	Total

<sup>9</sup> Vocational training is defined as courses meant to train skilled workers with entry level less that graduation.  
<sup>10</sup> Technical education refers to DAE courses.  
<sup>11</sup> If you are hiring against jobs that were previously filled.  
<sup>12</sup> If you created new jobs due to expansion or other factors.



	<b>Middle Management Level (Job Titles)</b>	<b>Number hired as Replacement<sup>13</sup></b>	<b>Number hired at New Jobs<sup>14</sup></b>	<b>Total</b>

18 **How many current vacancies for workers and middle management do you have in your company at this moment:**

Worker Level (Job Titles)	Number	Middle management Level (Job Titles)	Number

19 **At which level would you hire females?**

Middle Management  
 Worker Level

Any specific job titles that you seek to employ women against: \_\_\_\_\_  
\_\_\_\_\_

20 **What are the hard-to-fill vacancies/jobs in your company (even if these are currently filled)?**

Worker/Operator Level (Job Title)	Middle Management Level (Job Title)

<sup>13</sup>if you are hiring against jobs that were previously filled.

<sup>14</sup>if you created new jobs due to expansion or other factors.



21 **21A. Why are the worker level positions, hard to fill?**

Competition from other employers	Work is seasonal
Difficult working hours	Location is difficult to reach
lack of interest	Workers demand higher pay and better terms
Lack of Qualifications the company demands	Low number of applicants with required skills
Lack of work experience the company demands	Any other reason

**21B. Why are the middle management level positions hard to fill?**

Competition from other employers	Work is seasonal
Difficult working hours	Location is difficult to reach
lack of interest	Workers demand higher pay and better terms
Lack of Qualifications the company demands	Low number of applicants with required skills
Lack of work experience the company demands	Any other reason

22 **What kind of additional skills does your company expect from a worker at the time of recruitment?**

Worker Level	Middle Management Level
Urdu Literacy	Urdu Literacy
English Literacy	English Literacy
Work ethics	Work ethics
Numeracy/Mathematics	Numeracy/Mathematics
Safety	Safety
Computer Skills	Computer Skills
Communication Skills	Communication Skills
Team Work	Team Work
Any other Skills:	Any other Skills:

23 **What is the range of worker salary in your company?**

1. Permanent: Rs. \_\_\_\_\_ to \_\_\_\_\_ per month
2. Contractual: Rs. \_\_\_\_\_ to \_\_\_\_\_ per month
3. Piece work: Rs. \_\_\_\_\_ per piece

24 **Trainees of what type of training institution would you prefer?**

TEVTA       PVTC       Private Institutes

Other (specify): \_\_\_\_\_





25 Can you please list a few high quality training providers/institutes or master trainers (national and international) in the Garments Sector?

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_

26 Do you receive enough information about available national training courses? \_\_\_\_\_ Yes/No

27 On a scale of 1-5, how important is International Certification of Trainees for you (1 - most important, 5 least important)?

28 If you train workers within the company, what kind of training do you provide in-house to your employees at the worker level?

They learn at work automatically

A supervisor/trainer is responsible to train them

They are relieved periodically for an in-house structured training programme

Any other method \_\_\_\_\_

29 Do you think that any of your existing workers will require training. \_\_\_\_\_ Yes/No

What kind of trainings do you think could meet the training needs of existing workers?

Training course name	Suggested Duration (in weeks)	Proposed Training Provider (if any)

30 Will you be willing to relieve your workers for training outside your factory? \_\_\_\_\_ Yes/No

If yes, for what duration? \_\_\_\_\_ (Weeks)

31 Will you be willing to co-finance training of your own existing worker? \_\_\_\_\_ Yes/No

If yes, will you be willing to pay their salary during the period of their training? \_\_\_\_\_ Yes/No

32 Will your company be willing to provide training (theory and practical) to unemployed people? \_\_\_\_\_ Yes/No

If yes, in which skills: \_\_\_\_\_

And for how many trainees: \_\_\_\_\_

33 Will your company be willing to offer on-the-job training for unemployed people? \_\_\_\_\_ Yes/No

If yes, in which skills: \_\_\_\_\_

And for how many trainees: \_\_\_\_\_

34 What in your view are vocational skills that should be developed by companies from whom you purchase goods and services?

35 Please see the attached list of available courses in Annex A and give us a feedback on whether new courses need to be developed for the garments sector and if so, which ones?

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

36 Please rate the existing qualifications and specify demand using list in Annex A.

**Annex A:**

Below is a list of courses whose curricula is developed by City and Guilds, TEVTA, NAVTTC, PRGTTI while testing and certification is done by City and Guilds or the Punjab Board of Technical Education. Kindly grade these in order of preference on scale of 1 to 5 (1 High, 5 Low)

Course Code	Sector	Name of Course	Duration in months	Courses Developed By	Tested By	Preference on a scale of 1 to 5 (1 high preference - 5 low preference)	Approximate Demand by your company (Number)
CG-1	Textile	Fashion Wear (Level 3 certificate)	6	City & Guilds	City & Guilds		
CG-2	Textile	Pattern Cutting (Level 2 certificate)	6	City & Guilds	City & Guilds		
CG-3	Textile	Fashion Illustration (Level 2 certificate)	6	City & Guilds	City & Guilds		
CG-4	Textile	Silk Painting (Level 2 certificate)	6	City & Guilds	City & Guilds		
CG-5	Textile	Theatre Costume (Level 3 certificate)	6	City & Guilds	City & Guilds		
CG-6	Textile	Creative Computing (Level 2 certificate)	6	City & Guilds	City & Guilds		
CG-7	Textile	Lingerie (Level 2 certificate)	6	City & Guilds	City & Guilds		
CG-8	Textile	Hand Knit Textile (Level 3 certificate)	6	City & Guilds	City & Guilds		
CG-9	Textile	Hand Embroidery (Level 3 certificate)	6	City & Guilds	City & Guilds		
CG-10	Textile	Machine Embroidery (Level 3 certificate)	6	City & Guilds	City & Guilds		
CG-11	Textile	Textile Decoration (Level 2 certificate)	6	City & Guilds	City & Guilds		
PB-1	Garments	Fashion and Design	6	NAVTTC	PBTE		
PB-2	Garments	Fashion Designing	6	NAVTTC	PBTE		
PB-3	Garments	Industrial Stitching Machine Operator	6	NAVTTC	PBTE		
PB-4	Garments	Stitching Machine Mechanic	6	NAVTTC	PBTE		
PB-5	Garments	Knitting Machine Operator	6	NAVTTC	PBTE		
PB-6	Garments	Knitting Machine Mechanic	6	NAVTTC	PBTE		

PB-7	Garments	Pattern Drafting and Cutting	6	NAVTTC	PBTE		
PB-8	Garments	Machine and Hand Embroidery	6	NAVTTC	PBTE		
PB-9	Garments	Quality Control in Garments	6	NAVTTC	PBTE		
PB-10	Garments	Sportswear Stitching	6	NAVTTC	PBTE		
PB-11	Garments	Merchandising Management Techniques	6	NAVTTC			
PB-12	Garments	Production Planning and Control	6	NAVTTC			
PB-13	Garments	CAD/CAM Computerized Pattern Designing	6	NAVTTC			
PB-14	Garments	Industrial Engineering	6	NAVTTC			
PB-15	Garments	Import Export Procedures and Documentations	6	NAVTTC			
PB-16	Garments	Pattern Drafting and Grading	6	NAVTTC			
PB-17	Garments	Apparel Supervisor	6	NAVTTC			
PB-18	Garments	Fabric Cutting Expert	3	TEVTA	PBTE		
PB-19	Garments	Fabric Inspector	3	TEVTA	PBTE		
PB-20	Garments	Knitting Machine Operator	3	TEVTA	PBTE		
PB-21	Garments	Machine Embroidery	3	TEVTA	PBTE		
PB-22	Garments	Industrial Stitching Machine Operator	6	TEVTA	PBTE		
PB-23	Garments	Industrial Stitching Machine Operator	3	TEVTA	PBTE		
PB-24	Garments	Fashion Designing	12	TEVTA	PBTE		
PB-25	Garments	Patternmaking and Cutting	3	TEVTA	PBTE		
PB-26	Garments	Quality Control in Garments	3	TEVTA	PBTE		
PV-1	Garments	Industrial Stitching	6+2(OJT)	TEVTA	PVTC		
PV-2	Garments	Fashion Designing	12+2(OJT)	TEVTA	PVTC		
PV-3	Garments	Computer Pattern Designing	6+2(OJT)	TEVTA	PVTC		


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