



SKILLS DEMAND SURVEY IN RMG AND TEXTILE SECTOR



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Abbreviations

ADB	Asian Development Bank
BACCO	Bangladesh Association of Call Center and Outsourcing
BACI	Bangladesh Association of Construction Industry
BANBEIS	Bangladesh Bureau of Educational Information and Statistics
BASIS	Bangladesh Association of Software and Information Services
BBS	Bangladesh Bureau of Statistics
BDT	Bangladesh Taka
BEIOA	Bangladesh Engineering Industry Owners Association
BGMEA	Bangladesh Garment Manufacturers and Exporters Association
BIDS	Bangladesh Institute of Development Studies
BITAC	Bangladesh Industrial and Technical Assistance Center
BKMEA	Bangladesh Knitwear Manufacturers and Exporters Association
BMET	Bureau of Manpower, Employment and Training
BOESL	Bangladesh Overseas Employment Service Limited
BSCIC	Bangladesh Small and Cottage Industries Corporation
BTEB	Bangladesh Technical Education Board
BTMA	Bangladesh Textile Mills Association
CBLM	Competency-based Learning Material
CBT	Competency-based Training
CBT&A	Competency-based Training and Assessment
CEBAI	Centre of Excellence for Bangladesh Apparel Industry
DAP	Differently able Person
DCI	Data Collection Instrument
DTE	Directorate of Technical Education
EBT	Enterprise Based Training
EIG	Employment and Income Generation
EPB	Export Promotion Bureau
FCI	Feni Computer Institute
FGD	Focus Group Discussion
FY	Financial Year
GDP	Gross Domestic product
GoB	Government of Bangladesh
GUK	Gana Unnayan Kendra
GVA	Gross Value Addition
HDRC	Human Development Research Centre
HSC	Higher Secondary School Certificate
ILO	International Labour Organization
IMT	Institute of Marine Technology
ISC	Industrial Skills Council
JDC	Junior Dakhil Certificate
JSC	Junior Secondary Certificate

KII	Key Informant Interview
LFMEAB	Leather goods and Footwear Manufacturers and Exporters Association of Bangladesh
LFS	Labour Force Survey
MAEP	Market Analysis and Export Promotion
MoE	Ministry of Education
MoEWOE	Ministry of Expatriates' Welfare and Overseas Employment
MOI	Ministry of Information
MoU	Memorandum of Understanding
MPO	Money Payment Order
NGO	Non-Government Organization
NPVC	National Pre-Vocation Certificate
NSC	National Skill Certificate
NSDC	National Skills Development Council
NSDP	National Skill Development Policy
NSS	National Skill Standard
NTVQF	National Technical and Vocational Qualifications Framework
OSH	Occupational Safety and Health
PKSF	Palli Karma-Sahayak Foundation
RMG	Ready Made Garments
RPL	Recognition through Prior Learning
RTO	Registered Training Organization
SCDC	Standard Curriculum Development Committee
SCITI	Small and Cottage Industries Training Institute
SDC	Skill Development Center
SDC	Swiss Agency for Development and Cooperation
SDCMU	Skills Development Coordination and Monitoring Unit
SEIP	Skills for Employment Investment Program
SME	Small and Medium Enterprise
SMI	Survey of Manufacturing Industries
SSC	Secondary School Certificate
TI	Training Institute
TSC	Technical School and College
TTC	Technical Training Centre
TTTC	Technical Teachers Training College
TVET	Technical and Vocational Education and Training
TVI	Textile Vocational Institute
UDC	Union Digital Center
UNEVOC	UNESCO-UNEVOC International Center for Technical and Vocational Education and Training
VET	Vocational Education
Voc.	Vocation/Vocational
VTTI	Vocational Teacher Training Institute

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Prof. Abul Barkat, *PhD* Dhaka: May, 2018
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Executive Summary

Palli Karma-Sahayak Foundation (PKSF) is working with Skills for Employment Investment Program (SEIP) to support the targeted group of people to enhance their employable skills with the purpose of meeting the skills demand of the industries and self-employment as well. PKSF, through 22 training centers, is providing training mostly to the poor and low income group participants to improve their skill and make them employable. This study aims to let PKSF know the present and future skills demand as well as skills gap in RMG & Textile sector of Bangladesh to formulate her future policy and program in the area of skills development.

In particular, this study aims to explore occupation wise potential employment demand in the RMG and Textile sector and determine the number of prospective human resources by category of less-skilled, semi-skilled and skilled. This task is likely to be accomplished according to employers' demand in congruence with the objective of SEIP. The specific objectives of the study are as follows.

- i. To identify occupation wise job demand in RMG and Textile sector at home and abroad;
- ii. To examine the skills gap of existing human resources in comparison with potential job market demand;
- iii. To identify the causal factors of skills gap of existing human resources;
- iv. To formulate the action plan to ensure effective demand-driven skills training program for the less-skilled, underprivileged and low-income group.

Study Design and Implementation

The study adopted both quantitative and qualitative tools and techniques to collect data and information from primary and secondary sources. Enterprise level survey was conducted to collect primary data on the job demand, skills gap and causal factors of skills gap by interviewing both employer and employee using semi-structured interview schedule. For primary data collection, this study followed non-probabilistic or purposive sampling with a total number of 10 enterprises. Officially published data is also used extensively. Both quantitative and qualitative data are used and triangulated. In addition, relevant stakeholders and knowledgeable entrepreneurs of this sector were consulted in different phases of the study.

Study Findings

Domestic and Overseas Job Market Demand Assessment

The projection on the future job demand in RMG and Textile sector for domestic and overseas market is estimated separately. Although there are liberal and conservative estimates on the projection of overseas job demand, this study relies on conservative estimates.

The projected future job demand in RMG and Textile sector indicates that the total number of employment in this sector will be 10.7 million by the year 2027 increasing from 6.8 million in the year 2022 and from 4.7 million in the year 2017. It also implies that 2.1 million additional jobs will be created in this sector by the year 2022 and 6 million by the year 2027. In comparison with the size of employment in domestic market, the overseas employment is small. Estimates show that the total number of overseas employment in RMG and Textile sector will be 132.5 thousand by 2027 from 33.5 thousand in the year 2017.

Combining the estimates for both domestic and overseas market the estimated number of job demand in 2027 is 10,860,970 while the same was 4,719,912 in 2017.

In domestic market, employment in semi-skilled job will be on rise from 68.7 per cent to 72.4 per cent in 2022 and 73.3 per cent in 2027 while the proportion of both less-skilled and skilled along with professionals in total employment will be decreased in the next decade. According to the estimate, in 2027 the highest number of job will be created for sewing machine operator (4.29 million), followed by machine operator (1.83 million). Moreover, a large number of other jobs which will be created in 2027 are: pressing operator (0.32 million), knitting operator (0.30 million), cutter (0.27 million), dyeing operator (0.27 million) and hand trimmer (0.26 million).

The overseas employment in RMG and Textile sector will continue to be dominated by less-skilled workers in the next decade. Study indicates that the most opportunities in overseas job demand is expected to be created for Factory workers (60 thousand jobs in 2027 and 15 thousand in 2017) and Machine operators (62 thousand jobs in 2027 from 30 thousand in 2022 and 15 thousand in 2017). Among semi-skilled workers more opportunities are likely to be available for Foreman, Embroidery workers, and Weaving technicians.

Despite the projected higher number of job demand in RMG and Textile sector, the knowledgeable entrepreneurs of BGMEA noted that this sector is moving towards more mechanization which is labour displacing. They are not optimistic about the positive growth of employment in this sector.

Skills Gap Assessment and Its Causes

Skill assessment results unveil that only two per cent workers of the RMG and Textile enterprises were competent while 18.4 per cent workers were semi-competent in performing their current job. The remaining large segments of the existing workers (79.6%) were less-competent. Competent workers are found only in three occupations/trades: dyeing operator (25%), machine operator (12.5%) and helper working, predominantly, as assistant to other operators (7.2%).

Reportedly, high turnover rate is the most compelling reason behind the existing skills gap in RMG and Textile sector. Inadequate training content/curriculum, non-attractive remuneration or financial compensation, and lower level of general education are some other major reasons. A good number of employers (40%) mentioned that the existing training content or curriculum cannot satisfy the needs, followed by poor level of education (20%).

According to the experts and employers interviewed in this study, there is no coordination between the industry needs and trainings provided. The trainings are mostly lecture-based and assessment is not competency-based, and not following a nationally consistent approach and quality assurance. Hence, trained people also underperform if they get recruited. Majority of the training providers are imparting skills following the traditional theory-based technique. This type of learning provides a little practical experience. Apart from lack of qualified instructors, competency standards are not in line with the industry needs and shortage of registered assessors make the output less-satisfactory.

Primary survey with employers shows that, in the local job market, in RMG sector, acceptability of the trained worker is not high. Lack of good quality of training, provided by most of the existing training centres makes employers dissatisfied with the 'trained' worker and instigates to hire less-skilled worker as helper/assistant.

According to the RMG and Textile sector workers interviewed in the survey, short duration of training, no provision of practical lesson, and shortage of sewing machines with low quality were the problems faced by the trainees although the subject matter was found satisfactory. They further noted that longer duration of training, inclusion of more female trainer and more qualified trainers could be beneficial to ensure better quality of training. On the effectiveness of the training (received before joining the current job) to get a better job, the bulk majority of respondents (77.7%) opined that such training were not conducive in this regard. The remaining 22.3 per cent respondent found this training moderately conducive and very conducive in getting better job.

Any particular standard skills development training is expected to develop three distinct types of qualifications namely, generic competencies, sector specific competencies and occupation specific competencies. BTEB develops comprehensive training curriculum and assessment mechanism to address these key competencies that are required for acceptability in both national and international market. Study finds that the reality is somewhat different where the quality of training and certification is not up to the mark to satisfy the market demand.

Job Requirements and General Hiring Practices

The requirements for various occupations/trades set by employers do not vary between domestic and international market to a large extent. Sector and occupation specific skills are required for particular occupations/trades while there are a number of pre-requisites for all occupations referred as generic competencies. RMG and Textile enterprises usually recruit their manpower directly not through any agency. In general, regarding recruitment of less- and semi-skilled manpower, the following requirements in addition to specific technical skills are expected to be met by the prospective employee. Such requirements are maintained with more importance in case of overseas recruitment.

- Age should not exceed a particular limit;
- Educational qualification (in some cases, it is a must);
- Physical fitness;
- Ability to read and write;
- Certificate on training or any other qualification (if any).

In addition, survey finds that relevant work experience is taken into consideration, to a larger extent, than relevant training for recruiting workers in different occupations or trades in the RMG and Textile sector.

Methods followed for recruitment and criteria used for recruiting workers are two major issues of job placement mechanism, among others, from employer side. Study finds that a total of six methods as general hiring practices are followed for recruitment in the RMG and Textile sector of the country. Placing notice of employment opportunity in the organizational notice board (80%) was found the leading method for recruitment, followed by advertisement in web based job portals (70%) and from the acquaintance/existing workers (70%).

It is to be noted that web-based methods like advertisement in web portals and notice in the organizational website are getting prominence day by day and these digital hiring practices may be on top in the coming days. Training centre and industry linkage could be a potential instrument to find out the qualified candidate to recruit in various jobs in the RMG and Textile sector.

Skills Development System

Under the Technical and Vocational Education and Training (TVET) system, there are 13,163 institutions in Bangladesh with a 1,081,796 seat capacity. Bangladesh Technical Education Board (BTEB), offers 17 different courses and/or trades relevant to RMG and Textile sector. Each of the training courses has its own curriculum, duration, entry requirement and assessment procedure.

SEIP is an umbrella initiative where seven different programmes are in operation to improve the skill needs in RMG and Textile sector. SEIP has been working to skill-up around 260,000 participants through the network of a large number of institutions including (i) 32 public training providers; (ii) PKSF through its partner NGOs; (iii) Bangladesh Bank through its SME and special program department; and (iv) Industry Associations. PKSF as member of SEIP network is providing training on 'Fashion Garments'. This is a basic trade course (360 hours) like 'Dress Making and Tailoring' developed under the curriculum of BTEB. A total of 14,000 young male and female are trained by 14 partner NGOs of PKSF under SEIP.

Absence of nationally consistent approach for quality assurance, non-aligned standard of qualifications with the skills levels of industry, inappropriate quality of graduates and the lack of coordination in this sector are some critical issues of TVET (GoB, 2011). To address these, industry skill council (ISC) is established under national skill development council (NSDC) for RMG and Textile sector. Administering competency based assessment of learning or competencies by external assessor registered with BTEB and recognition of prior learning (RPL) might be two avenues for assessment and certification.

Current State of Skills Acquisition

Skill acquisition status of the current workers in RMG and Textile sector is not encouraging. Survey findings exposed that only 15 per cent of workers had skills development training prior to joining their present job. Another important observation, getting a job in the garment industry (55.6%) mainly motivates to participate in the training followed by remaining unemployed at the time of training held (33.3%), acquiring new skill (22.6%), and learning new knowledge (11.1%).

Assessment on gender inclusiveness of the provided training is impressive. Most of the training venue was evaluated as woman friendly since 62.5 per cent and 31.3 per cent female worker reported their assessment as completely agreed and agreed respectively. Behavior of the training centre's authority and the trainer was women-friendly. Health and maternity issues were also considered during training.

At the survey time, employers mentioned that soft skills were expected as training outcome. Among various types of soft skills, 90 per cent of employers keep the 'positive attitude of worker' at the top of the list followed by ability for group work (80%), interested to new learning and techniques (70%) and initiating works on their own (70%).

Recommendations and Action Plan

1. According to the study findings, in the next decade (by 2027), there will be a total of 10.7 million jobs in local RMG and Textile sector where semi-skilled occupation/trades is the bulk (73.3%) source of this employment. The study also suggests that the total number of overseas employment in this sector will be 132.5 thousand by 2027 from 33.5 thousand in the year 2017.

Skills development initiatives should target a number of high demand trades in domestic sector namely cutter, dyeing technician, fitter, trimmer, knitting operator, machine operator, pressing operator, sewing machine operator, quality controller, supervisor (cutting), supervisor (packer), and textile autoCAD. Regarding overseas market, this initiative should target trades such as Foreman, Embroidery workers, and Weaving technicians.

A small number of jobs (as share of total employment) will be created under skilled and professional category. But since these are high income generating jobs, skills development programme should also target managerial occupations like finishing manager, cutting manager, factory manager, human resource manager, and assistant production manager.

2. NSDC is developing competency standards for the trainings of RMG and Textile sector, among others. The courses and the their duration are stated below. Training for the above-mentioned high demand trades should be designed on the basis of the following trainings as per CBT&A developed and set by BTEB and NSDC.
 - Apparel Screen Printing 480 hrs.
 - Circular Knitting Machine Operation 660 hrs.
 - Sewing Machine Operation 360 hrs.
 - Sewing Machine Operation (Denim) 360 hrs.
 - Sewing Machine Operation (Knit) 360 hrs.
 - Sewing Machine Operation (Woven) 360 hrs.
 - Sewing Machine Operation (Lingerie) 360 hrs.
 - Tailoring and Dress Making 360 hrs.
 - Common (NPVC 2; pre vocational) 360 hrs.
3. PKSF is working with NGOs for poverty eradication and most of them are creating job through Employment and Income Generation (EIG) program. So, self-employment, especially in the informal sector, SME and industry based job, should be the target of PKSF supported skills training. To this end, skills training appertained to the RMG and Textile sector should include Tailor, Block Batik Printer, Garments Machine Operator, Hand Embroiderer, Sweater Linking Operator, Garments Machine Mechanics, Dyeing Technician, Machine Embroiderer, Sweater Knitting Operator as well as other industry related training. In addition, financial literacy and management training should be provided. Notably, most of the training mentioned above is more female orientated.
4. In order to ensure inclusion of people from low income group, following intervention strategies should be taken.
 - Trainee and need assessment should be done by the NGOs,
 - For easy initial placement, trainings for trades should consider local demand, and
 - Common training (NPVC2) could be provided in order to make them prepared for further training.
5. Competency-based learning materials (CBLMs) built upon the competency standard approved by BTEB has to be prepared and used in the training and periodical review of the CBLM. It will ensure updating knowledge and technology to impart by training institutes.
6. Inclusion of soft skills as unit of competency and increase in hours to complete the unit successfully needs to be considered in the competency standards.

7. Training participants under RTOs should be given opportunity to be assessed to get NTVQF certificate later on in case of unavailability of the BTEB accredited assessor on time.
8. Based on the BTEB approved competency standards, learning materials should include core, trade and soft unit of competency. More importantly, extra unit on labour right, decent work, safe migration, green job, climate change, and disaster and worker migration should be the focus of attention.