Generation
KENYA

REPORT JULY 2024

# SKILLS NEEDS ASSESSMENT (SNA) OF THE TEXTILE AND APPAREL (T&A) MANUFACTURING SECTOR IN KENYA

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# ACKNOWLEDGMENT

The Skills Needs Assessment (SNA), undertaken by Generation Programme Kenya with support from IDH's INSTEP program, offers an in-depth analysis of the skills landscape within Kenya's Textile and Apparel (T&A) manufacturing sector.

This report reflects field visits, interviews and stakeholder consultations across the T&A manufacturing ecosystem, and a validation workshop held in November 2023 attended by sector experts from government ministries, private sector entities, and factory employers and employees. Inputs gathered have been analyzed to offer actionable recommendations for addressing skill gaps and enhancing workforce capabilities in the sector to enhance productivity.

Our appreciation goes to government agencies, universities, Technical and Vocational Education and Training (TVETs) institutions, training agencies, T&A manufacturing companies, associations, and Small and Medium Enterprises (SMEs) for their contributions. Special acknowledgment is due to the Permanent Secretary of Technical and Vocational Education and Training (TVETs), the Director of TVETs, and the Ministry of Trade, Investment, and Industry, as well as KAM, FKE, and the Fashion Council of Kenya for their support and guidance.

We thank our research partners, and all stakeholders whose invaluable insights shaped this study. It is our earnest desire that the insights presented herein will serve as a valuable resource for policymakers, industry leaders, and training institutions, fostering the growth and competitiveness of Kenya's Textile and Apparel Manufacturing sector.

# LIST OF ABBREVIATIONS

| | |
|---|---|
| **ATIP** | Africa Trade & Investment Program |
| **AU** | African Union |
| **AVTS** | Advanced Vocational Training Scheme |
| **CAD** | Computer Aided Design |
| **CAGR** | Compound Annual Growth Rate |
| **CBET** | Competency Based Education and Training |
| **CBETFK** | Competency Based Education and Training Framework of Kenya |
| **CITS** | Crafts Instructor Training Scheme |
| **CMT** | Cut, make and trim |
| **CTA** | Cotton-Textile and Apparel |
| **CTS** | Craftsmen Training Scheme |
| **DGT** | Directorate of General Training |
| **EPZA** | Export Processing Zone Authority |
| **FKE** | Federation of Kenya Employers |
| **FTA** | Free Trade Agreement |
| **FTC** | Fair Trade Certificates |
| **GDP** | Gross Domestic Product |
| **GDT** | Directorate General of Training |
| **GRS** | Gender-Responsive Strategy |
| **HRM** | Human Resource Management |
| **ICT** | Information Communication and Technology |
| **IE** | Industrial Engineer |
| **IEA** | Institute of Economic Affairs |
| **ILO** | International Labour Organization |
| **ITAD** | Institute for Textile and Apparel Development |
| **ITI** | Industrial Training Institutes |
| **JSS** | Jan Shikshan Sansthan |
| **KAM** | Kenya Association of Manufacturers |
| **KEBS** | Kenya Bureau of Standards |
| **KEPROBA** | Kenya Export Promotion and Branding Agency Council |
| **KIA** | Kenya Investment Authority |
| **KIE** | Kenya Industrial Estates |
| **KII** | Key Informant Interview |
| **KITI** | Kenya Industrial Training Institute |
| **KNBS** | Kenya National Bureau of Statistics |
| **KNCCI** | Kenya National Chamber of Commerce and Industry |
| **KTTI** | Kenya Textile Training Institute |
| **MITI** | Ministry of Investment, Trade and Industry |
| **MoT** | Ministry of Textiles, Govt. of India |
| **MSDE** | Ministry of Skill Development and Entrepreneurship |
| **MSEA** | Micro and Small Enterprise Authority |
| **MTP** | Medium Term Plan |
| **NCVET** | National Council for Vocational Education and Training |
| **NGOs** | Non-Governmental Organizations |
| **NITA** | National Industrial Training Authority |
| **NSDC** | National Skill Development Corporation |
| **NSDF** | National Skill Development Fund |
| **NSQF** | National Skill Qualification Framework |
| **NSQN** | National Skill Qualification Network |
| **NSTIs** | NSTIs |
| **NTPO** | National Trade Promotion Organization |
| **OEM** | Original Equipment Manufacturer |
| **OHS** | Occupational Health and Safety |
| **PMKVY** | The institute Pradhan Mantri Kaushal Vikas Yohana |
| **QA** | Quality Assurance |
| **RPL** | Recognition of Prior Learning |
| **SAR** | Sustainability Assessment Report |
| **SCBTS** | Scheme for Capacity Building in Textile Sector |
| **SEZs** | Special Economic Zones |
| **Shs** | Shillings |
| **SMEs** | Medium and Small and Medium Enterprises |
| **SNA** | Skill Needs Assessment |
| **SSCs** | Sector Skill Councils |
| **T&A** | Textile and Apparel |
| **ToT** | Training of Trainers |
| **TSIs** | Trade Support Institutions |
| **TSN** | Trade Support and Network |
| **TVET** | Technical Vocational Education and Training |
| **TVETA** | Technical and Vocational Education and Training Authority |
| **TVET-CDACC** | TVET - Curriculum Development, Assessment & Certification Council |
| **US** | United States |
| **USAID** | United States Agency for International Development |
| **USD** | United State Dollar |
| **WEAMCO** | Weavers' Marketing Cooperative Society |
| **WTO** | World Trade Organization |

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# EXECUTIVE SUMMARY

The Textile and Apparel (T&A) Industry in Kenya stands as the second-largest source of employment after agriculture, highlighting its crucial role in the country's economic and social advancement. This sector holds the potential for significant growth, primarily attributed to preferential market access provided under the African Growth and Opportunity Act (AGOA) and third-country fabric provision clauses. These provisions allow Kenya to utilize fabric imported from Asia in apparel production, positioning it for expansion. The industry's trajectory aligns with Vision 2030 and the government's Bottom Up Economic Transformation Agenda (BETA) 2022-2027. The implementation of the medium-term 2023 budget policy statement geared towards inclusive growth could foster a notable shift in apparel production, potentially diverting it from the traditionally dominant global players. Additionally, the execution of the Fourth Medium Term Plan (MTP) under Kenya Vision 2030 prioritizes economic recovery strategies, aiming for a 6.1% growth rate in 2023, up from an estimated 5.5% in 2022.

T&A Industry is characterized by its labor-intensive nature, offering rapid mass employment opportunities especially to women, who make up over 60% of its workforce. Structured across three tiers, encompassing large enterprises located within Export Processing Zones (EPZ) and a multitude of medium-sized, large, micro, and small companies outside EPZs, the industry exhibits a broad spectrum of participation. In terms of training, six universities offer sector related courses in both bachelor's and master's degrees, along with 201 training and vocational institutions (155 public, 46 private).

However, despite its promising outlook, the sector faces significant challenges. These include a critical shortage of skilled labor, particularly at technical and managerial levels, leading to productivity challenges and worker dissatisfaction. Additionally, inadequate infrastructure, high operational costs, limited access to financing, and unfavorable policies and regulations hamper growth. Addressing these challenges is crucial for unlocking the industry's full potential, driving inclusive economic growth, and advancing Kenya's social development objectives.

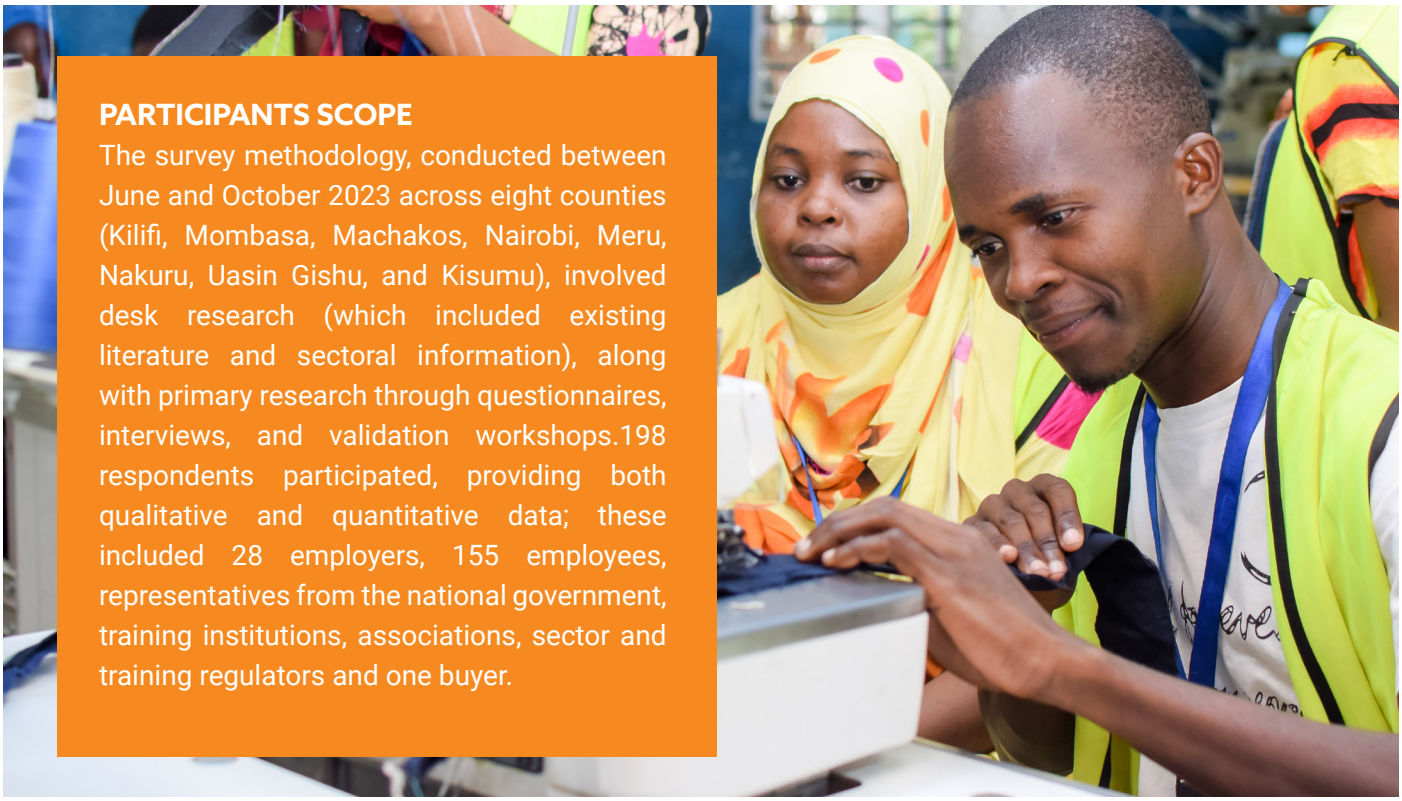
Generation Programme Kenya (GPK) undertook the SNA to understand the status and requirements of skilled manpower in various job roles in the T&A industry. The study engaged industry representatives, Universities and TVETs, private training providers, relevant government departments (including training authorities), and trade associations. Furthermore, the research study aligns with the broader goal of fostering industry-academia-government collaboration, essential for promoting skill development, enhancing workforce readiness, and driving sectoral growth. By facilitating dialogue and knowledge exchange among key stakeholders, the study lays the groundwork for informed decision-making and targeted interventions to strengthen the textiles and apparel industry in Kenya.

The study objectives were:

Assess the current working conditions for the workforce and recommend a holistic intervention that enhances worker well-being.

Gain an understanding of employer-employee engagement and advocate for improved engagement between workers and management by sharing feedback and outcomes through the Generation program.

Identify skills gaps and emerging skills needs in the sector.

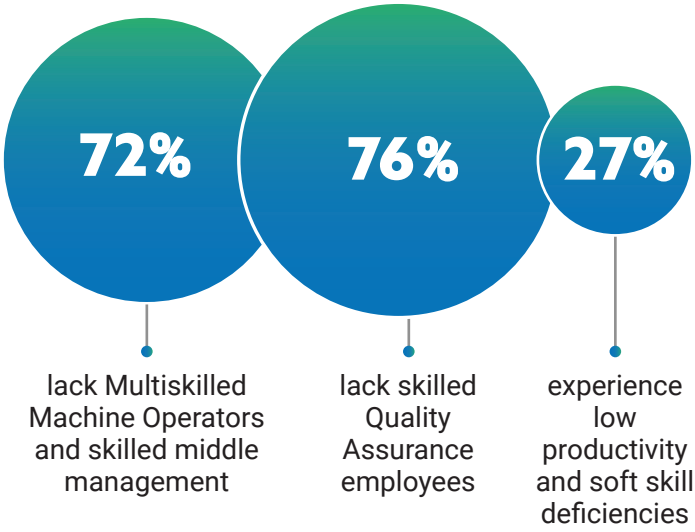


**PARTICIPANTS SCOPE**

The survey methodology, conducted between June and October 2023 across eight counties (Kilifi, Mombasa, Machakos, Nairobi, Meru, Nakuru, Uasin Gishu, and Kisumu), involved desk research (which included existing literature and sectoral information), along with primary research through questionnaires, interviews, and validation workshops.198 respondents participated, providing both qualitative and quantitative data; these included 28 employers, 155 employees, representatives from the national government, training institutions, associations, sector and training regulators and one buyer.

## EMPLOYERS FEEDBACK

Employers provided feedback highlighting various challenges faced in their factories, with the most prevalent being the lack of certain crucial roles. Significantly, 78% of the respondents indicated a shortage of trained multi-skilled machine operators and CAD machine operators. Additionally, employers highlighted critical skill shortages within their factories, necessitating the recruitment of expatriates to fill these gaps. These skills include industrial engineers, fabric inspectors, middle and technical management, brand management, and quality assurance.

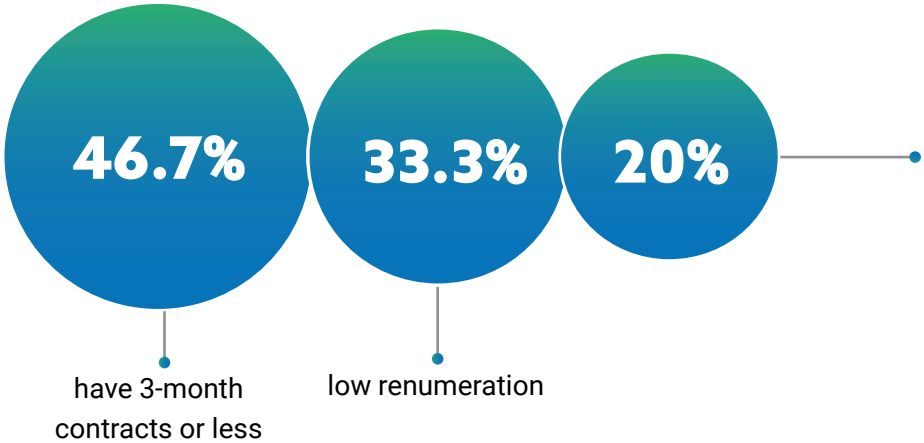



## EMPLOYEES FEEDBACK

In the study, 82% of the respondents were within the youth bracket 18-35 years. It is worth noting that 62% of all respondents constituted female workers. During the duration of the study, 46.7% of the respondents had contracts running for a duration between 1-3 months. Only 13.4% had one-year contracts. Several employees enjoyed benefits varying from – medical cover, subsidized meals, provision of child creche, transport allowances while others acknowledged receiving other forms of benefits including performance bonuses. The study also noted 27% had no form of benefiting besides the monthly wages. Employees shared various challenges they experienced in their workplace leading to occupational stress. These challenges include:

- Short term contracts - below 3 months and discrimination in the renewal
- Long working hours and lack of leave pay – reported by 20% of the respondents
- Harassment by their supervisors
- Lack of employee benefits such as medical cover
- Poor communication across various cadres
- Unconducive working environments (congestion, dust, dirty washrooms, inadequate air conditions, leaking roofs and water pipes, machine breakdowns, delayed salaries, lack of expertise or skills when receiving new orders with specific style of design among other challenges)

**60% of employees surveyed were satisfied with their working conditions**



## SECTOR STAKEHOLDERS FEEDBACK

Other key stakeholders, primarily representatives from the national government, training institutions, associations, sector and training regulators responded on various challenges and possible solutions in addressing critical skill gaps and other industry challenges hindering the sector competitiveness regionally and globally. They recommended quality Top of Form Improvement of the products to meet global standards with a focus on:

**A. AI Integration and Technological Proficiency:** The respondents underscored the significance of integrating AI technology to improve efficacy and quality control within the industry. They emphasized the necessity of incorporating courses that facilitate AI integration, highlighting the importance of workers adapting to technological advancements to enhance performance management. Furthermore, there's a clear emphasis on traceability and transparency in ensuring product integrity, signaling a growing demand for skills in data analysis and supply chain management.

**B. Technical Competency:** Technical competency emerged as a critical skill, covering a spectrum of roles including proficient machine operators (such as CAD and boiler operators), pattern makers, quality assurance personnel, supervisors, and operators handling specialized machinery.

**C. Management and Coordination Skills:** Design skills, soft skills, and integrity were acknowledged as pivotal aspects in the textile and apparel sector by respondents. Proficiency in patternmaking and design, alongside soft skills like communication, teamwork, and problem-solving, were deemed essential. Furthermore, integrity was underscored as critical, particularly considering challenges like high turnover rates and emphasizing the necessity for dependable and committed employees.

**D. Management and Coordination Skills:** The focus is on cultivating management and coordination skills to boost effectiveness and efficiency in the textile and apparel sector. Initiatives for capacity building are highlighted to enhance operational management. Comparisons with established international players like Sri Lanka and India underscore the necessity for investing in both software (management systems) and hardware (machinery) for holistic improvement.

**E. Management and Coordination Skills:** The focus is on improving productivity and quality standards within the textile and apparel industry. This entails enhancing efficiency, ensuring products meet specifications, and bolstering supervisory skills for quality control. Addressing these aspects is seen as vital for enhancing competitiveness and overall industry performance.

Overall, the study identified the key gaps in enhancing skills for workers in the textiles and apparel industry as below:

**A.** Limited technology and infrastructure both in training institutions and factories training setups

**B.** Institutional trainers lacking industry exposure and therefore lack the skills needed to train for the sector.

**C.** The training curriculum in the educational institutions primarily focus on design and fashion aspects, neglecting crucial key global trends and manufacturing concepts. The current/existing curricula, in TVETs for example, predominantly consist of theoretical inputs, failing to adequately prepare trainees for specific and focused job roles within the industry. This misalignment and alignment between curriculum and industry requirements is a significant gap that needs to be addressed to bridge the skills gap to the next level in the sector.

**D.** There is a shortage of skilled middle-level managers in the industry.

**E.** Skill gaps at the different levels within the factory which increases the cost of production and reduces the firm's margins and competitive ability.

**F.** The industry working conditions were also identified as key gaps. The textile and apparel sector in Kenya faces several key employee risks, and labor-related aspects including, poor occupational health and safety standards, low wages, long working hours, lack of social protection, limited employment contracts, gender-based challenges, and limited unionization. These risks contribute to challenging working conditions for employees.

To address skills gaps and emerging skills needs, the study recommends a holistic approach to guide interventions for a skills development framework that bridges the skill gaps at different levels in the sector. The study proposes the establishment of a technical working committee to steer this process with a focus on:

Developing standardized content across the various skill sets, training of trainers for the skill sets,

Resource mobilization to address skill gaps and related industry challenges

Enhancing employer-employee engagement to enhance accountability and better work environment, and worker well-being and hence spur productivity.

Collaboration with educational institutions to tailor industry driven courses that meet the evolving needs of the textile and apparel sector.

Offer incentives for continuous learning and upskilling to encourage workforce development and retention.

Developing monitoring and tracking and continuous improvement of the program.

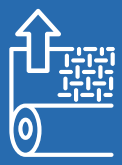
Drawing on global best practices (with India as a case study), the report proposes strategic interventions to support job creation and skills development in the industry. It outlines a pilot test framework to assess the viability of new skills, create learner profiles, and design tailored training programs. Accompanying the pilot framework is a detailed action plan that provides specific steps for delivering skills training, establishing training centers, engaging industry stakeholders, and recruiting learners. Additionally, a risk matrix was developed to proactively identify potential risks and implement targeted mitigations to ensure successful implementation.

# SECTION 1: BACKGROUND AND CONTEXT ON GLOBAL AND REGIONAL MARKET TRENDS IN TEXTILE AND APPAREL

This section outlines the rationale behind investing in the textile and apparel industry, offering insights into global production trends within the apparel sector and shedding light on Kenya's positioning in this industry.

## 1.1 BACKGROUND

The Textile and Apparel sector is one of the largest and key drivers for a country's economic development worldwide. The sector does not only meet the people's diverse and growing needs, but also generates job opportunities and plays an important role to the public finances to foster economic development[1]. According to the Sustainability Assessment Report (SAR) of 2023[2] , global textile consumption and production increased, thereby stimulating global economic growth. Additionally, the textile sector is a crucial industry, contributing significantly to the respective developed and developing countries' total GDP and export revenue.



**World Biggest Exporter, ranks China as the largest textile exporter followed by Germany and India. Worldmetrics.org reports China accounts for around 35% of global exports**

**Table 1: World Biggest Exporters Analysis**

| Top Textile Exporting Countries | |
|---|---|
| Country | Export Value |
| China | $176 billion |
| Germany | $38.99 billion |
| India | $37.11 billion |
| Italy | $36.57 billion |
| Bangladesh | $34 billion |
| Vietnam | $27 billion |
| Turkey | $19.7 billion |
| Mexico | $13.8 billion |
| USA | $11.6 billion |
| Indonesia | $11 billion |

Data Source: World Biggest Exporter[3]

[1]Ho and Watanabe, 2020; Poursoltan et al., 2021)

[2]Global Sustainability Assessment Textile and Apparel Sector 2023

[3]Skill gap and skills upgrading study for Cotton, Textile and Apparel in Kenya – learning from Indian best practices by KAM

## 1.2 GLOBAL AND AFRICAN CONTEXT IN TEXTILE AND APPAREL

The global apparel industry holds immense economic significance, boasting a staggering value of $3 trillion and contributing to approximately 2% of the world's gross domestic product (GDP). It serves as a vital sector for nations worldwide, driving export revenues and sustaining livelihoods for a vast workforce directly or indirectly associated with the field. As of 2021, the industry provided employment to around 3.45 billion individuals, marking a substantial increase from 24.8 million in 2014-15.

**Figure 1: Global Apparels Market Share**


Historically, the apparel industry has been instrumental in fueling the economic progress of nations such as Hong Kong, South Korea, Taiwan, and Singapore, recognized as the Asian Tigers. More recently, countries like China, Vietnam, Thailand, Cambodia, and Bangladesh have witnessed remarkable growth and advancements in living standards, propelled by export-focused strategies.

However, changing economic landscapes, marked by escalating wages and trade-friendly policies, have spurred buyers to diversify their sourcing networks. Emerging low-cost destinations in Asia, such as Bangladesh, Vietnam, and Cambodia, along with Sub-Saharan African regions like Kenya and Ethiopia, have emerged as attractive sourcing hubs due to favorable procurement conditions[3].

The top exporters collectively command

**over 72.5% of global trade in textile and apparel**

with China alone holding a substantial

**41.1% share**

## 1.3 KENYAN CONTEXT IN TEXTILE AND APPAREL

KENYA IS ONE OF THE largest exporters of garment and apparel under AGOA with about Kshs 54.12 billion worth of exports in 2022 with a capital investment of Kshs 24.88 billion

These companies have diversified ownership - foreign-owned, Kenyan-owned, or a combination of both[4].

Three-tier T & A industry categorisation

**36** large enterprises from the EPZ

**170** medium-sized and large companies

**70,000** micro and small companies (non-EPZ) including fashion designers and tailoring units.

However, the success of the apparel factories in the EPZ has not trickled down to the local textile industry. The apparel factories in the EPZs continue to source raw materials including fabric, sewing threads and accessories from Asia, where they are manufactured under Original Equipment Manufacturer (OEM). In addition to these, there are also companies operating under Special Economic Zones

[4]Innovative Business Practices and Economic Models In the Textile Value Chain January 2024

(SEZs), which offer special tax and infrastructure benefits to facilitate a wide range of activities including storage, export, and re-export[5].

Generally, most of the work in apparel EPZ factories involve cut, make and trim (CMT), with all the designing, sourcing, and marketing (i.e., higher value addition activities) being done outside Kenya. Based on data provided by EPZ[6] the imports by the garment factories at EPZ accounted for an average of 31% of Kenya T&A imports. To reverse this challenging situation, the Kenyan Government, as part of the Kenyan Vision 2030, aims to use the T&A sector as one of the flagship sectors.

**The sector witnessed a**

**7.2% ↑**

**from 2018 to 2022**

in which 36 firms with a capital investment of Shs 24.88 billion generated exports worth Shs 54.12 billion.

To support its potential and enhance earnings from the sector, the government has set up the following interventions:

- Revival of local textile firms, including RIVATEX, supported by the 'Buy Kenya, Build Kenya' initiative. This is to promote local production and help wean Kenyans away from second-hand clothes, known locally as 'Mitumba'. One study by the Institute of Economic Affairs (IEA)[7] estimated that Kenyans spent KES 197.5 billion in 2019 on clothes and footwear.
- Development of the Athi River Textile Hub
- Completion of 16 industrial sheds, and provision of basic infrastructure facilities (roads, electricity and water, sewerage and security fence) at Athi River EPZ
- Modernization of RIVATEX machinery through completing modernization of spinning and weaving areas, construction of effluent treatment plant for zero discharge, perimeter wall and fire management systems.
- Renovation of a leather factory in Kariokor, Nairobi.
- Support for biotechnology innovations like BT Cotton by the National Biosafety Authority. BT cotton is resistant to pests and diseases, matures faster and delivers higher yields per acre. This is a critical lifeline for cotton farmers and the supply of cotton as a raw material for the textile industry.
- Negotiations with the US on a Free Trade Agreement (FTA). The pact would build on the objectives of the African Growth and Opportunity Act (AGOA). There is also a push by the industry to conserve the liberal rules of origin for apparels that Kenya currently enjoys under AGOA, in an FTA with the US.

[5]Special Economic Zones. New Path to Industrialization. https://www.invest.go.ke/special-economic-zones

[6]EPZA (2019). Export Processing Zone Program Annual Performance Report. Available at: https://epzakenya.com/wp-content/uploads/2020/09/EPZ-Annual-Performance-Report-year-2019

Ratification of African Continental Free Trade Area by Kenya: This ratification that came into effect from January 1, 2021, to spur intra-Africa trade has seen a significant increase with Kenya among the member states of AU (African Union) who are in a position to benefit from the deal under the principle of reciprocity. The agreement will create the largest free trade area in the world measured by the number of countries participating. This brings together a market of 1.3 billion people in 55 countries with a combined gross domestic product (GDP) of USD3.4 trillion. However, its full potential is dependent on member countries implementing significant policy reforms and trade facilitation policies.

The Ministry of Trade, Investments & Industry is charged with the responsibility of formulating policies and offering support to the manufacturing sector. The ministry does this through its subsidiaries, departments and agencies to exert its control to monitor/administer policy decision taken at apex level, namely Export Processing Zones Authority (EPZA), Kenya Bureau of Standards (KEBS), Micro and Small Enterprise Authority (MSEA), and Kenya Industrial Estates (KIE) Ltd.

Other support ecosystems in several public and private sectors such as, Trade Support Institutions (TSIs) and Trade Support and Network (TSN) have been set up to assist local and foreign entrepreneurs, including MSMEs, in Kenya. Some of the TSIs that directly or indirectly assist operators in Textile & Apparel industry include:

01

Kenya National Chamber of Commerce and Industry (KNCCI)

02

Kenya Association of Manufacturers (KAM),

03

Kenya Apparel Manufacturers and Exporters Association (KAMEA)

04

Association of Fashion Designers of Kenya (AFAD (K)

05

Handloom Weavers' Marketing Cooperative Society (WEAMCO); private membership - based organizations whose mandate supports the sector.

06

The Kenya Investment Authority (KIA) a public entity that's pivotal in attracting and facilitating investments in Kenya.

07

Kenya Export Promotion and Branding Agency Council (KEPROBA) a National Trade Promotion Organization (NTPO) mandated to promote exports from Kenya.

08

The Africa Trade & Investment Program (ATIP) under the USAID that promotes trade and investment in Kenya.

This will propel Kenya towards achieving the goal of becoming a newly industrialized state. Research[8] indicated that Kenya boasts of a higher production efficiency in the T&A sector in the East African region but faces challenges such as a dearth of technical and managerial talent, poor infrastructure, high energy cost, higher labour cost, cumbersome customs processes, and low level of environmental compliance.

## 1.4 COMPETITIVENESS OF THE SECTOR WITHIN EAST AFRICA AND ASIA

Comparatively, Kenya outranks India in the ease of doing business index, with Kenya securing the 56th position while India ranks 63rd. These rankings offer insights into the facilitation of starting and managing local businesses, as well as the safeguarding of property rights. The ease of doing business index encompasses ten metrics evaluating

[7]Institute of Economic Affairs (IEA) https://ieakenya.or.ke/download/the-state-of-second-hand-clothes-and-footwear-trade-in-kenya/

[8]Achim Berg, Saskia Hedrich & Bill Russo, (2015). East Africa: The next hub for apparel sourcing; Available at: https://www.mckinsey.com/~/media/McKinsey/Industries/Retail/Our%20Insights/East%20Africa%20The%20next%20hub%20for%20apparel%20sourcing/East%20Africa%20The%20next%20hub%20for%20apparel%20sourcing.pdf

various facets of business regulations, including the time, cost, and minimum capital required to initiate a business, procedures for obtaining construction permits, securing permanent electricity connections, and property registration. A higher ranking underscores a more streamlined and transparent business environment within the respective state.

## 1.5 SKILLS DEMAND IN THE TEXTILE AND APPAREL SECTOR

According to ILO the future of work in textile and apparel sector is changing rapidly because of technological advances, climate change, demographic shifts, globalization, geopolitics and other drivers and megatrends , There is a growing recognition of the urgent need to invest in the skills necessary to drive the industry forward. According to MOTIF Report 2020 on the state of skills in the apparel industry, 57% of respondents from all over the world felt that their companies had difficulty filling positions due to the lack of a skilled workforce, covering all areas from design, patternmaking, sustainability and environmental management, human resources, research and development and the soft skills of workers at all occupational levels. Retiring skills, a lack of quality professional training and a shortage of new industry entrants with the necessary skills were among the main reasons for the industry-wide skills gap, which constitutes a threat to future employment, growth and sustainability of the sector if it is not addressed[11]

In Kenya, tertiary education programs, both at certificate and diploma levels, tend to prioritize Fashion and Design, which hold significant appeal among the youth population. However, this focus often overshadows the crucial emphasis needed on foundational skills related to production technology, processes, equipment maintenance, and multi-skilling. There is therefore a mismatch between what is taught and what the market requires. Because of this mismatch as summarized in Figure 2.0 below, the production skills which are key to the sector are not supplied, and the graduates of training institutions are not readily employed.

**Figure 2: Skills Mismatch Overview**

| | Univ. of Dedan Kimathi | Mascal School of Design | Tech. Univ. of Kenya | Moi Univ. | Tech |
|---|---|---|---|---|---|
| Sewing tools and equipment | 1 | | 1 | | |
| Spinning | | | | 1 | |
| Weaving | | | | 1 | |
| Textile fibres | 1 | | 1 | 1 | 1 |
| Textile exploration | | 1 | | | |
| Pattern drafting | 1 | 1 | 1 | | 1 |
| Fashion design | 1 | 1 | 1 | | 2 |
| Fashion marketing | | 1 | 1 | | |
| Design development | | 2 | 1 | | |
| Apparel making | 1 | | 1 | 1 | 1 |
| Clothing construction | | 1 | 1 | | |
| Industrial engineering | | | | 1 | |

Limited number of training activites reflecting current production trend in Kenya

High concentration of training activities in fashion/ design rather than physical production of textiles and garments

Source: Global development solutions

[9]Future of Work in Textile and Apparel Sector: https://www.ilo.org/wcmsp5/groups/public/---ed_dialogue/---sector/documents/publication/wcms_855495.pdf
[10]MOTIF, 2020 report: The state of skills in the apparel industry, 2020. The survey is based on 923 respondents from all over the world: 42 per cent from North America, 16 penr cent from South America, 19 per cent from Europe and 21 per cent from Asia.
[11]MOTIF, 2020 report: The state of skills in the apparel industry, 2020. The survey is based on 923 respondents from all over the world: 42 per cent from North America, 16 penr cent from South America, 19 per cent from Europe and 21 per cent from Asia.

The industry also faces a skills gap along the entire value chain, and a pervasive lack of practical knowledge of modern equipment, tools, and production methods. Managerial staff are difficult to find, rendering the use of expatriates very common. (Kenya Textile and Apparel Industry Strategy 2013-2018 by the Ministry of Investment, Trade and Industry and World Bank)

The Textile and Apparel Strategy by the Ministry of Investment, Trade and Industry (MITI) acknowledges low labor productivity and a mismatch in the supply and demand for relevant labor skills as one of the biggest constraints hindering growth and highlights the following constraints:

**01** Labor prices in Kenya have increased over the past three years and these costs have not been matched by improved productivity and quality.

**02** Kenyan labor has among the lowest value added per worker among select comparator countries, reflecting poor levels of productivity given current wage rates.

**03** Firms do not perform training needs audits, which limits the information they have to conduct targeted training. In addition, the Training Levy firms must pay every month, is not perceived to increase the quality and quantity of skills in the market.

**04** Low firm productivity is partially due to the limited availability of qualified staff, especially for managerial positions.

**05** Training institutions suffer from insufficient funds for programs and students, lack of modern equipment and material, and low-capacity levels of training staff. Secondary challenges are low enrollment, and the mismatch between manufacturers' needs and training, largely due to the limited interaction between training institutions and the textile and apparel sector.

**06** The lack of equipment-specific training programs in Kenya hinders multi-skilling of labor.

Therefore, to elevate Kenya's competitive position in the textile and apparel sectors, a more dynamic delivery mechanism is necessary to swiftly adapt to market changes. While basic skills training can persist within existing institutions, fostering the types of skills and knowledge crucial for supporting rapid sustainable growth, especially in niche markets, becomes paramount. This requires a shift away from formal, institutionalized training towards on-site skills development, enabling tailored training in managerial, product-specific, and task-oriented skills.

Improving skills, as emphasized by Vidyadhara Consultancy LLP, remains vital for enhancing quality employment and fostering sustainable development. Merely relying on cheap, low-skilled labor is unlikely to be adequate for future competitiveness. Continuously upgrading and adapting existing skills through upskilling and reskilling is essential for progress. Lifelong learning and continuous training are increasingly critical to ensuring that employers and workers can adapt to the rapidly changing industries, including the advent of new technologies, new materials and the growing pressure and need to manufacture products in an environmentally sustainable way to help mitigate and adapt to climate change[12]

The Ministry of Investment, Trade and Industry recommends the creation of a private institution—the Institute for Textile and Apparel Development (ITAD)—to specifically support the sector in addressing skills gaps. ITAD would help drive the skills agenda in the textile-apparel sector to improve labor productivity.[13]

**Table 2: Institute for Textile and Apparel Development (ITAD) Structure.**

| Institutional Support | Skills to address productivity | Investment in equipment and technology | Access to new markets |
|---|---|---|---|
|  **Sewing tools and equipment Spinning Weaving Textile fibres Textile exploration** | Shift to on-site skills development and encourage training audits | Encourage firms to conduct factory-level energy audits to see how much energy (and money) could be saved through equipment upgrading | Develop Kenya's brand image as a hub for green textile and apparel production |
| | Encourage multi-skilling for factory-floor workers and mentorship & coaching programs for mid-level management | Develop a sector-wide promotion program to encourage firms to upgrade technology and equipment through concessionary financing and support them in drafting business plans to do so. | Sponsor trade shows targeted at the T&A sector to generate Business to Business connections |
| | Improve the efficiency of training levy | Promote green certifications among firms to provide credibility to international buyers | Sponsor tours for Kenyan firms to see buyers and producers |
| | Impose term limits on expatriate work permits | Discontinue the energy subsidy or condition it to energy audits and equipment upgrading in participating firms | Leverage public sector procurement |
| | Foster local partnership between firms and research institutions, potentially through a center of excellence | | |

Source: Kenya Textile Strategy 2013-2018

12Working Conditions in the Textile industry: https://globaledge.msu.edu/blog/post/54484/working-conditions-in-the-textile-indust

[13]Kenya Textile and Apparel Industry Strategy by the Ministry of Investment, Trade and Industry and World Bank: https://openknowledge.worldbank.org/server/api/core/bitstreams/34d55816-eb59-56d6-9391-f6eb35409c3d/content

# SECTION 2: SURVEY OBJECTIVES, APPROACH AND METHODOLOGY

## 2.1 INTRODUCTION

This section records the rationale and the context of the study, objectives, expected outcomes, is the approach and methodology to the research.

## 2.2 RATIONALE AND CONTEXT

Generation Programme Kenya is dedicated to staying abreast of the dynamic job market landscape, ensuring that our training initiatives remain pertinent and impactful. To fulfill this commitment, we continuously interact with diverse sectors to pinpoint their challenges, anticipate emerging skill requirements, and understand evolving employment criteria. Since 2017, we have fostered close partnerships with the textile and apparel industry, furnishing them with skilled sewing machine operators. Conducting a skill needs assessment within this sector is paramount for sustaining our ability to meet industry demands effectively, aligning our training programs with present and future workforce needs, crafting new programs, and assisting employers in cultivating supportive work environments conducive to enhancing employee performance and heightened productivity.

## 2.3 TARGET AUDIENCE

The survey was conducted in Kilifi, Mombasa, Machakos, Nairobi, Meru, Nakuru, Uasin Gishu and Kisumu Counties between June and October 2023 and 198 respondents participated in the survey with 28 employers, 155 employees, national government 2, training institutions 6, associations 3, sector regulator 1, training regulators 2 and 1 buyer as detailed below.

**Table 3: Survey Participants Analysis**

| Category | Focus | Number |
|---|---|---|
| Employees | Operators | 81 |
| | Helpers | 12 |
| | Supervisors | 9 |
| | Quality Assurance | 9 |
| | Other Categories | 44 |
| Employers | EPZs | 12 |
| | Medium | 8 |
| | SMEs | 8 |
| Ministry and Government Agencies | MITI | 2 |
| Training Institutions | Universities | 2 |
| | National Polytechnics | 4 |
| Associations | KAM | 1 |
| | FKE | 1 |
| | Fashion Council | 1 |
| Sector Regulator | EPZA | 1 |
| Training Regulators | NITA | 1 |
| | TVETA | 1 |
| Buyers | International | 1 |
| Total | | 198 |

## 2.4 SURVEY OBJECTIVES

The overarching objective of the survey was to engage key textile and apparel sector stakeholders with the aim to:

Assess the current working conditions for the workforce and recommend a holistic intervention that enhances worker well-being.

Gain an understanding of employer-employee engagement and advocate improved dialogue between workers and management by sharing feedback and outcomes through the Generation Kenya skill training program.

Identify skills gaps and emerging skills needs in the sector.

## 2.5 SURVEY APPROACH AND METHODOLOGY

In conducting the survey for the textile and apparel sector, Generation Programme Kenya employed a comprehensive approach aimed at gathering the correct status of the sector in addressing the multifaceted objectives of the assessment. The survey considered perspectives from both the demand and supply sides, as well as engaging key enablers in the sector. It assessed the status and outcomes of sector analysis, identified opportunities, showcased success stories of beneficiaries, highlighted challenges and proposed risk mitigation strategies. The following strategies were adopted:

**Table 4: Survey Approach**

| Method | Activities |
|---|---|
| Data Collection | Secondary Research: This involved Collecting and analyzing data from existing literature and sectoral information.<br>Primary Research: This involved engaging 198 key stakeholders in the sector through questionnaires and interview sessions with key informants to gather both qualitative and quantitative data. |
| Sampling | Sample sizes were planned for various stakeholder groups, including government institutions, manufacturers, training institutions, sector regulators, buyers, and associations |
| Research Methods | Qualitative and quantitative research methods were used. |
| Data Analysis | Both qualitative and quantitative aspects were analyzed to draw conclusions and understand the impact and shortcomings in line with the study's objectives. |
| Comparative Analysis | The study includes a comparison of global best practices in the Apparel sector with the Kenyan context, highlighting best practices for consideration. |
| Validation | The study underwent an extensive validation process that involved Focus Group Discussions from the industry stakeholders that were from employers, industry experts, sector regulators, associations and government institutions. |
| Final Report | The report covers the current status and outcomes of the sector analysis, opportunities, success stories, bottlenecks, risk mitigation strategies, a road map with milestones for implementation, detailed recommendations, a pilot test framework for new skills, learner profiles, and a rollout strategy. |

## 2.6 SURVEY OUTPUTS

The survey had the following broader outputs:

**A** Strategic Interventions aimed at supporting job creation and enhancing skills development within the sector.

**B** Pilot Test Framework to assess the viability and effectiveness of new skills within the textile and apparel sector. This framework will involve the identification of key skills in demand, the creation of learner profiles outlining the specific competencies and attributes required for these roles, and the design of training programs tailored to meet these needs.

**C** Action Plan: This action plan outlines specific steps and timelines for delivering skills training for new roles identified in the sector, including the establishment of training centers, engagement with industry stakeholders, and the recruitment and enrollment of learners.

# SECTION 3: FINDINGS AND ANALYSIS

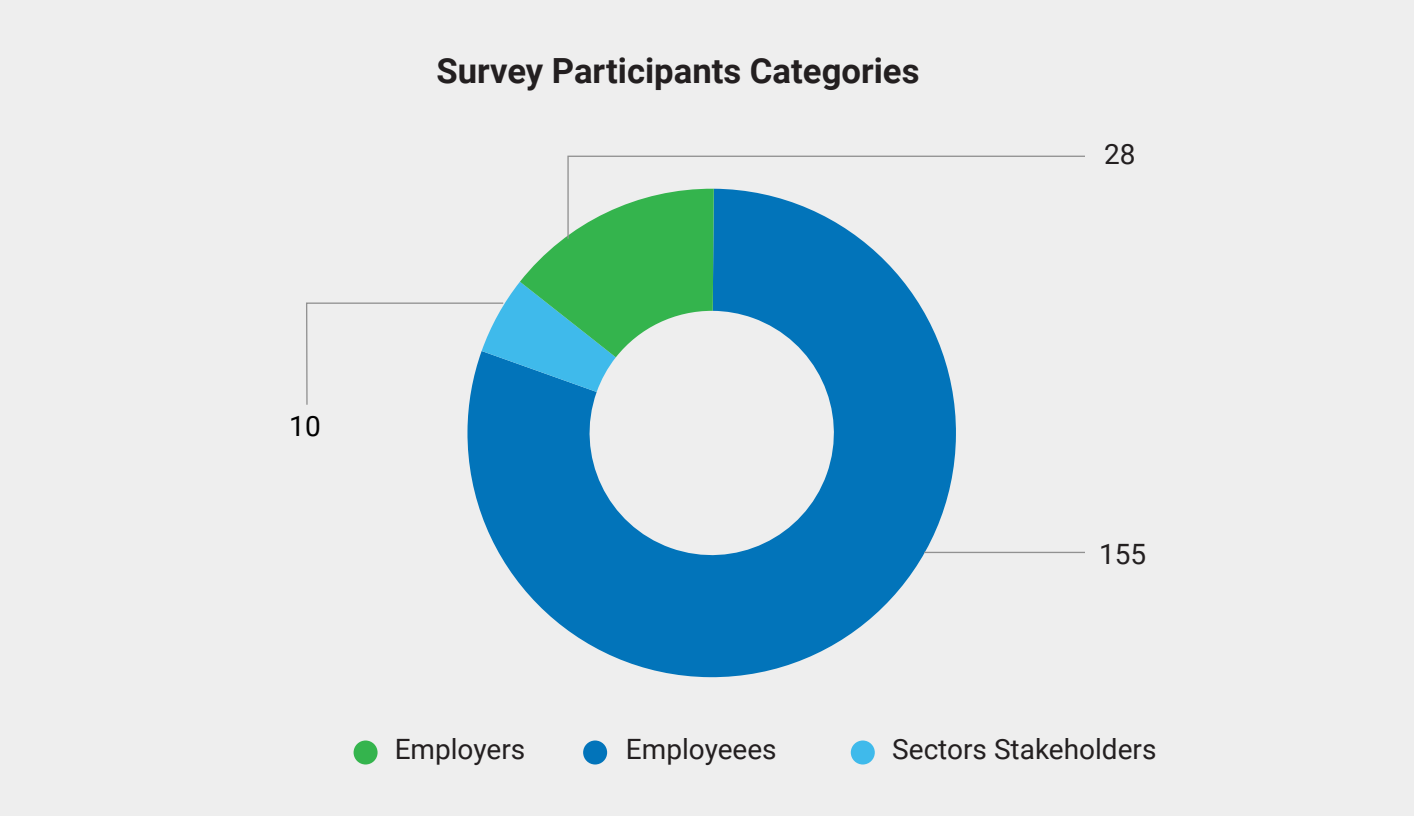
## 3.1 INTRODUCTION

The findings and analysis in this report are derived from a thorough survey conducted by Generation Kenya within the textile and apparel sector. Using rigorous methodology, the survey explored multiple facets of the sector, incorporating viewpoints from both demand and supply sides, and involving key facilitators. By combining secondary and primary research, the survey offered insights into the status, challenges, opportunities, and success stories within the textile and apparel industry.

## 3.2. SURVEY RESPONDENTS OVERVIEW

The needs assessment reached out to (a) 28 apparel manufacturing companies' employers; (b) 12 EPZs; (c) 8 medium-sized/Local factories; and (d) 8 SMEs. From these companies we had 155 employees. Further, the survey reached 10 sector stakeholders respectively - Government agencies (Ministries, Sector Regulators, Training Regulators) Training Institutions, Associations and Buyers.

**Chart 1: Overview of Surveyed Respondents.**




On employee demographics, 82% (127) of the respondents were in the age bracket 18 to 35 years. This demographic trend reflects a predominantly youthful workforce within the apparel and textile industry. Of the total respondents randomly selected, 62% (96) were women. This aligns with a report by the International Labour Organization (ILO) on the textile and apparel sector, which highlights the predominance of female employees within this industry. These figures also underscored the importance of considering gender dynamics in understanding the workforce composition and potential challenges within the sector.

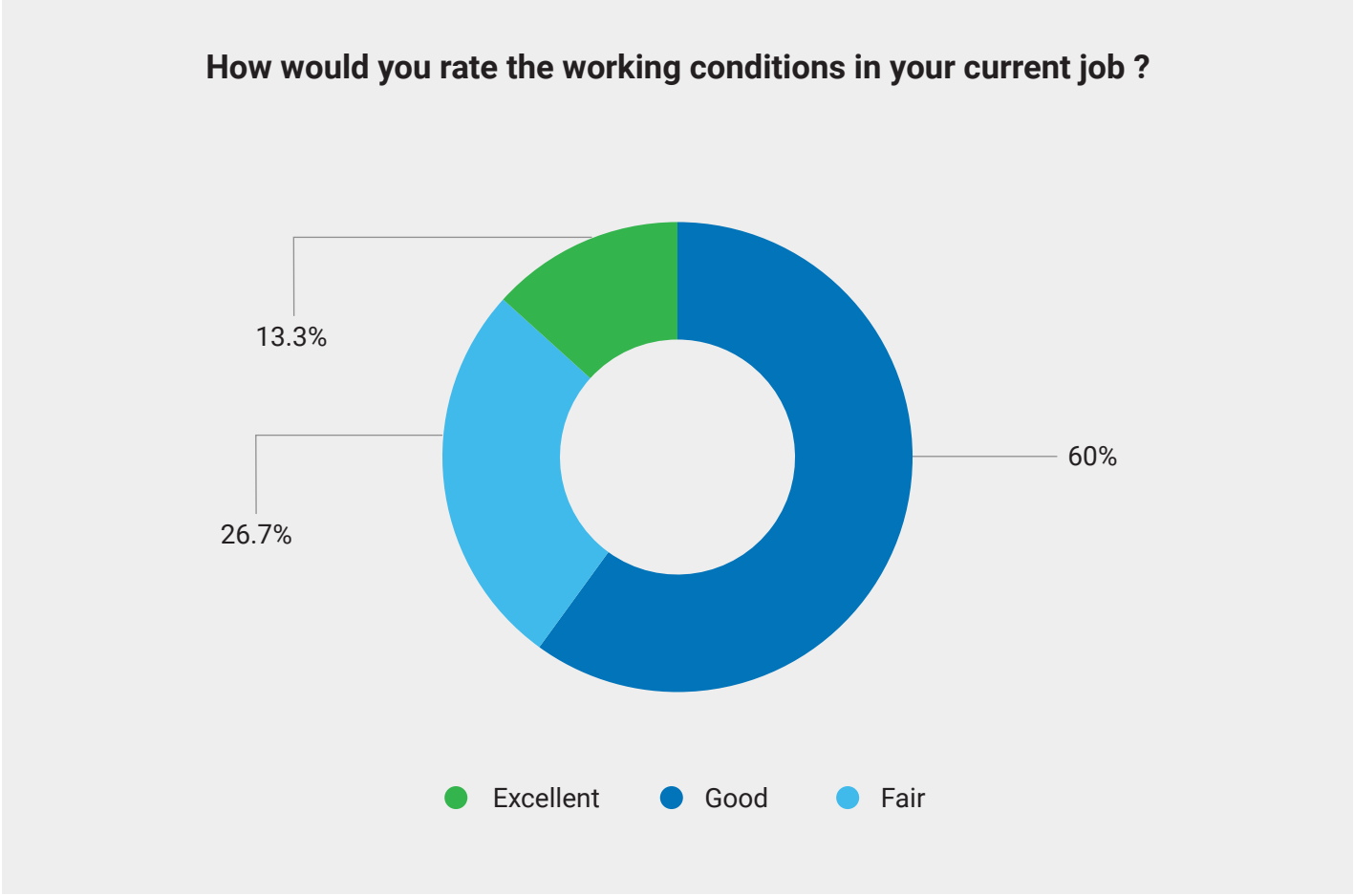
## 3.3 CURRENT WORKING CONDITIONS FOR THE WORKFORCE

A review of the KNBS Economic Survey 2023 indicates that Kenya's textile and apparel industry has 36 EPZs under AGOA, employing 66,260 people in Kenya in 2022.

The survey was designed to understand workforce training and skills gaps in Kenya's textile and apparel sector which further investigated worker engagement and wellness. The review analyzed their perceptions on the working conditions, working hours, employment contract and the duration of the same, and career paths. Further the survey sought to understand the challenges faced and proposed solutions to improve individual and company productivity. The following summarizes the survey findings from engaging employees and employers on working conditions.

The study first assessed the perceptions by employees regarding their working conditions. Results showed that 60% of respondents felt their working conditions were good, 26.7% rated them as excellent:

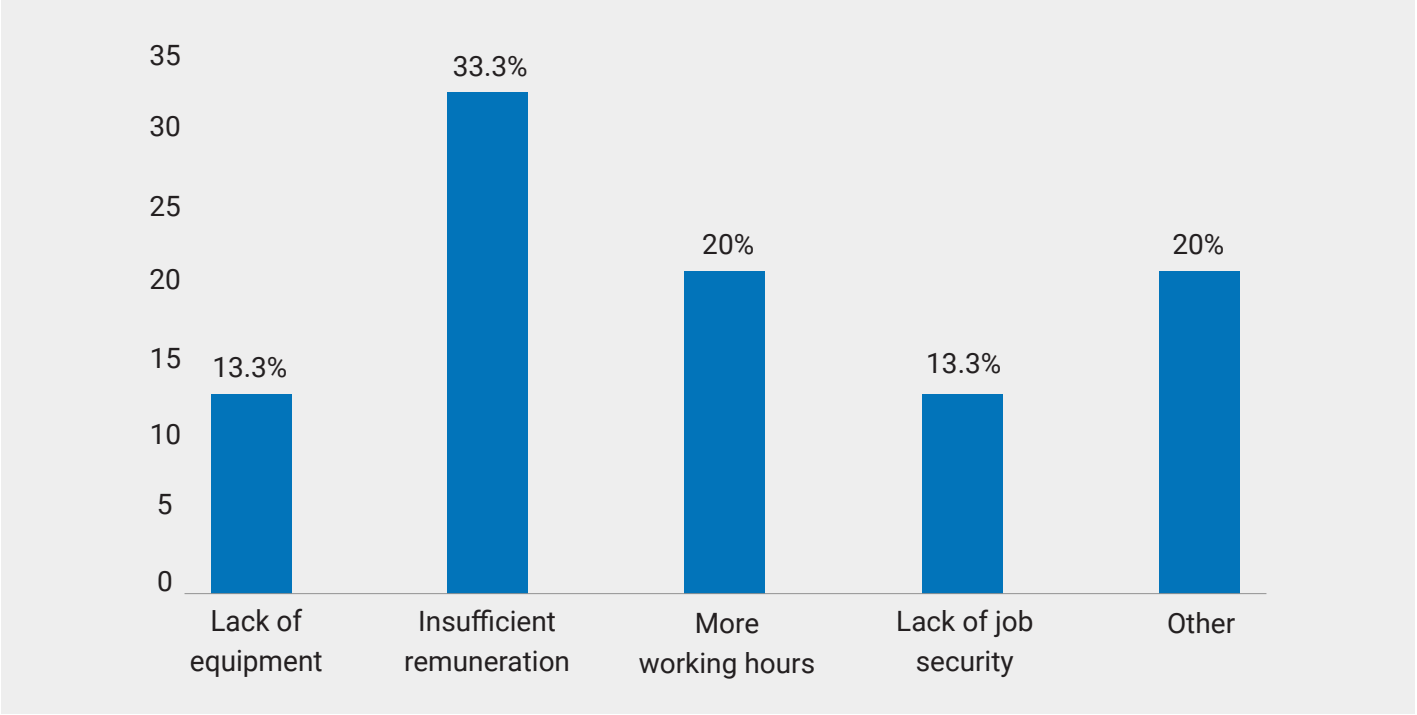
**Chart 2: Current Working Condition of Employees.**




The working conditions were defined by key parameters including health and safety, security, provision of lockers, sanitation, rest/lunch spaces, tea breaks, working space and equipment.

**(A) Current Employee views on challenges faced:** Some of the challenges are illustrated in chart 3 below with 33.33% on numeration as the most outstanding while 80% were satisfied with their work hours:

**Chart 3: Current Challenges Facing Employees.**



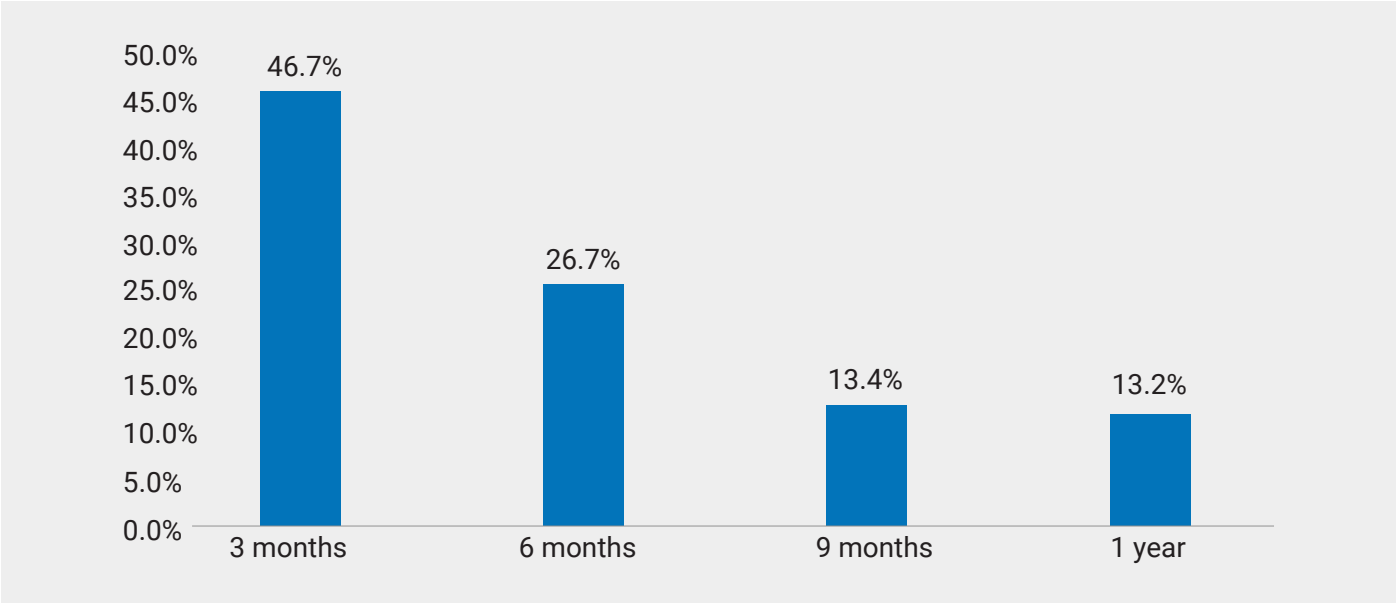

i **Low renumeration:** Although wages across the industry are regulated through gazettement (Minimum Wage Gazette Notice 2022) by the national government, it was evident as illustrated above that employees were not satisfied with what they are renumerated. The monthly wages ranged from Kshs 14,994 to 28,000 depending on whether in a city location or rural for Machine operators to Supervisors at the time of this study. The rural employees received the lowest monthly pay at Kshs 14,994 for a Machine Operator while those in the cities received a minimum Kshs 19,815. Other benefits included a performance-based incentive/ bonus paid weekly and primary healthcare.

ii **Working hours and leave:** From the employees interviewed, 20% worked more than the standard 8 hours. The hours ranged from 9 to 10 hours (SMEs stretching to 12 hours) with poor compensation. This was due to various reasons that included what they perceived to be unrealistic targets, covering for absenteeism and increased workload.

> "Working hours-The management approves maximum working hours 60/ week.45 hours normal day+15 overtime hours otherwise the compliance officer is mandated to instruct the maintenance in charge to switch off the lights."-**KII with an Employer**

**iii Lack of job security revolved around contract duration as illustrated below:**

**Chart 4: Contract Duration for Employees**




The employees interviewed also indicated that they face challenges in relation to the employment contracts. Most felt the contracts were short, preferring long term contracts of a year or more. Some also denoted that some of the contracts lacked motivational aspects, growth and development opportunities for the employees. Although not stated on the contracts a number reported existence of the following benefits: medical cover (32%), subsidized meals (5%), provision of child creche (5%), get transport allowances (4%) while 35% acknowledged to receive other forms of benefits including performance bonuses. These benefits were provided either singular or a combination of the above. A significant 27% reported on not having any form of benefits.

**iv Interviews held with both employees and employers** in the textile and apparel industry revealed a multitude of other factors (20%) affecting workplace dynamics.

**01**

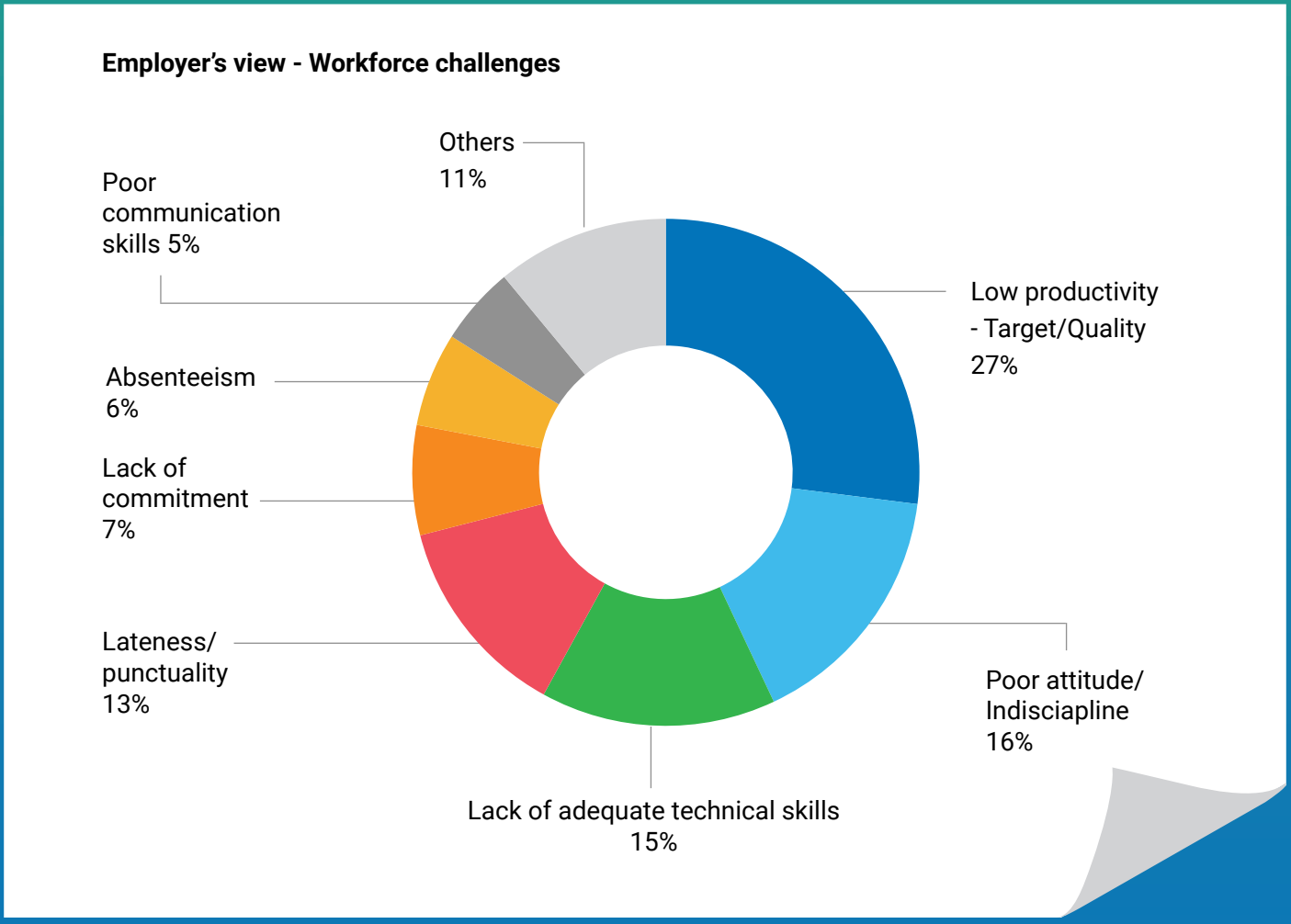
Employees expressed concerns over poor communication skills, abusive language from superiors, mismanagement of materials, and long working hours without proper compensation (resulting in fatigue), all of which have led to decreased morale, productivity, and job satisfaction. Financial instability resulting from low wages and delays in salary payments further compounded these issues, highlighting the critical link between adequate remuneration and employee well being.

**02**

Employers emphasized the importance of efficient machinery, skilled labor availability, and streamlined supply chains for enhancing productivity. They also acknowledged the need for compliance with labor regulations and investment in training programs to address workforce challenges effectively.

**(B) Employer views on workforce challenges:** The study's findings underscored the collaborative efforts needed between employers and employees to foster sustainable and inclusive growth in the apparel manufacturing industry. Several notable pain points were identified as illustrated below:

**Chart 5: Current Challenges from an Employer's perspective.**




It was noted that a leading pain-point by employers was low productivity at 27%. This was illustrated through low quality and not meeting expected targets as scheduled. This was further attributed to lack of adequate technical skills, poor communication skills, negative attitude hence underscoring the need for soft skill training, absenteeism and punctuality (especially when reporting back from leave or during pay days). Other challenges (11%) included poor material and accessory handling, planning, long working shifts, lack of agility, delayed salaries and low wages.

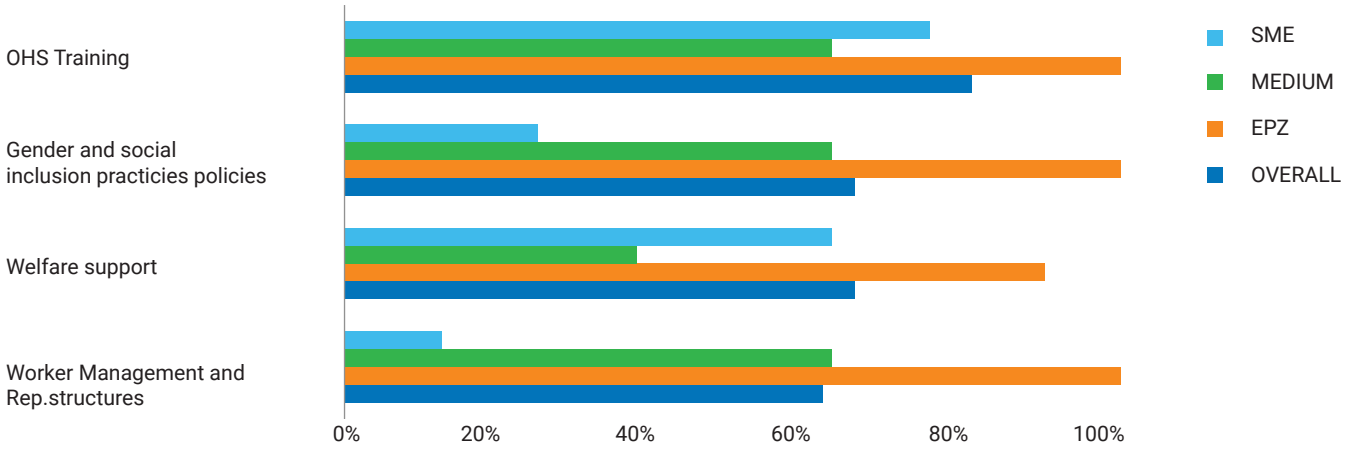
Some of these challenges are collaborated at both levels interviewed and hence strengthening the need for an enhanced Employer-Employee engagement through structured feedback mechanisms.

An interesting observation from the study also pointed to significantly varying rates of staff attrition across the 3 tiers sampled. The EPZs factories average attrition rate was reported at 3.9%, the medium sized factories at 14% and the SMEs at 18.8%. The reasons would range from staff looking for 'greener pastures', favorable working conditions, staff 'poaching', absconding and disciplinary issues. Employers however reiterated that they had put policies in place that stipulated 45 hours of normal work and a maximum of 15 hours for overtime for any given week.

**(C) Current Labor Support Structures:** Despite numerous employee challenges faced by the sector industries, several factories have made considerable progress in addressing and setting up structures to support a good working environment. Refer to table 5 below.

**Chart 6**: **Prevailing Support structures for Workforce in the T & A sector.**

**Employer-Employee Support Structures**




From the sampled employers, the EPZ factories showed a more structured management of employee affairs as compared to local or medium sized organizations and SMEs. This has been largely propelled by the fact that they undergo more stringent audits from their buyers than the other tier of manufacturers. All EPZs sampled had robust OHS structures through their Safety and Compliance units, they had varying implementation of worker representation in labor issues ranging from worker committees to robust unions. All of them had policies on Gender and Social Inclusion practices. This can be enhanced by implementing these policies more purposefully on the shop floor to address some of the challenges highlighted above. 56% of Local/Medium sized manufacturers (NB. for purposes of this study a factory with 100-500 employees) and 44% of the SMEs (less than 100 employees) sampled implement the above structures as compared to 98% of the EPZ factories.

**(D) Career pathways:** The study noted existence of existence of career pathways in the EPZ and local/ medium factories with established Human Resource functions that supported staff advancement and promotions. Most employees (93.3%) reported experiencing or witnessing promotions within their companies, while a small percentage (6.7%) noted the absence of promotions (largely from the SMEs). Various factors were identified as influencing career advancement/promotion. This were identified by the workers as hard work, dedication, professional conduct, discipline, commitment, experience, punctuality, respect, effort, initiative, supervisory recommendations, humility, and overall performance. Promotions were also found to be merit-based. However, the study also revealed lowly significant perceptions hindering employee promotion, including unfair competition, inadequate experience, work ethic, discipline, tribalism, nepotism, and corruption.

## 3.4 SKILLS GAPS AND EMERGING SKILLS NEEDS IN THE SECTOR

The assessment highlighted that a significant portion of companies prioritize skill development among their employees, with 87.0% reporting the existence of skill upgrading programs within their company, while 13.0% expressed a lack of such programs.

### 3.4.1 CHALLENGES WITHIN THE OPERATIONAL FRAMEWORK:

The challenges identified in the study range from shop floor employees to supervision and support functions as illustrated in table 7 below:

**Table 5: Roles Reported as Lacking by Employers**

| Analysis roles that employers confirmed are lacking | | Response Rate |
|---|---|---|
| 1 | Lack of multi-skilled machine operators | 25% |
| 2 | Lack of CAD machine operators/trained pattern makers and layering employees | 25% |
| 3 | Poor Quality Assurance - Lack of understanding of complete process - most understand specific processes | 14% |
| 4 | Lack of trained Industrial Engineers - training not available | 8% |
| 5 | Training not available for washing dry and wet processing | 8% |
| 6 | Challenge in the availability of Middle Management technical and management skills | 5% |
| 7 | Lack Fabric Inspectors | 3% |
| 8 | Lack of Customer service training | 3% |
| 9 | Brand Management | 3% |
| 10 | Scarcity of multi-skilled Machine Mechanics | 3% |
| 11 | Merchandising - no vocational training available to market standards | 3% |
| 12 | Mindset and adaptability for the skills available | 3% |

The lack of multi-skilled operators is seen to result in prolonged learning curves exceeding 60%. Moreover, there's a shortage of skilled manpower, with unskilled individuals prevailing across different operational domains. Vocational training opportunities are notably lacking, leading to heavy reliance on job-based learning for the levels identified above.

There is a lack of understanding of the complete process in Quality Assurance with most employees only mastering specific tasks. The employers indicated that they were unable to find trained employees as Industrial Engineers, Washing Dry and Wet processing, scarcity of Multiskilled Machine Mechanic, Fabric Inspectors and trained Merchandisers.

This has resulted in investing a lot of time and resources in training on the job thus impacting on the overall productivity and production cost.

### 3.4.2 SKILL UPGRADING PROGRAMS:

Skill improvement programs encompass various initiatives, such as firefighting and first aid training, operational skills enhancement, multi-operational training, introduction to common pool operators, continuous learning orientation, and safety training. Employees also highlighted their ability to provide first aid to colleagues during accidents, showcasing how these programs have equipped them with life-saving skills and improved workplace safety. Additionally, the training efforts have been linked to increased production output, indicating that improved skills and efficiency positively impact overall workplace productivity.

Furthermore, these training programs have facilitated skill development and diversification, opening new opportunities for employees. These opportunities include certification and recognition in garment making, better decision-making during emergencies, and improved collaboration among operators. By expanding skill sets and promoting collaboration, these initiatives not only empower employees but also contribute to a more resilient and adaptable workforce in the apparel manufacturing sector.

### 3.4.3 SKILL DISCREPANCY CHALLENGES IN THE T&A INDUSTRY:

The study through interviews with the sector regulators also established that there is a significant shortage of skilled machine operators, managers, and supervisors within the T&A industry. Despite individuals claiming to possess the necessary skills for these positions, upon placement in the job roles, the respondents noted that many lack the competencies they purported to have. This gap in skilled personnel poses a substantial challenge to the industry, hindering its ability to operate efficiently and meet production demands.

> "In all levels-factories training their own and no pool of available experts. There is a shortage of skilled machine operators, managers, and supervisors in the T&A industry. Most of those who say they have skills; you put them in the job and discover they do not have the skills they claim to have. We look for the ones that look cleverer than the others and retrain them." **-KII with a Sector regulator**

The study also noted that there are gaps in skills that the employees would like to be trained in. Emphasis was put on leadership development especially on leadership skills, crisis management, financial management, interpersonal skills and mentorship. The respondents also noted that there exists a gap in the relations between the management and workers, thus the need for adequate communication and relationship skills among both parties.

### 3.4.4 AVAILABILITY OF BASIC TRAINING FOR OPERATORS:

The employers highlighted the availability of basic training for operators, noting its widespread provision. However, the study unveiled shortcomings in the depth of training offered, particularly concerning access to specialized equipment. Interviews conducted with employers cited a disparity between the skills imparted in training institutions and the industry's demands, especially in effectively utilizing specialized equipment. This disconnect underscores the need for enhanced alignment between training programs and the practical requirements of the industry.

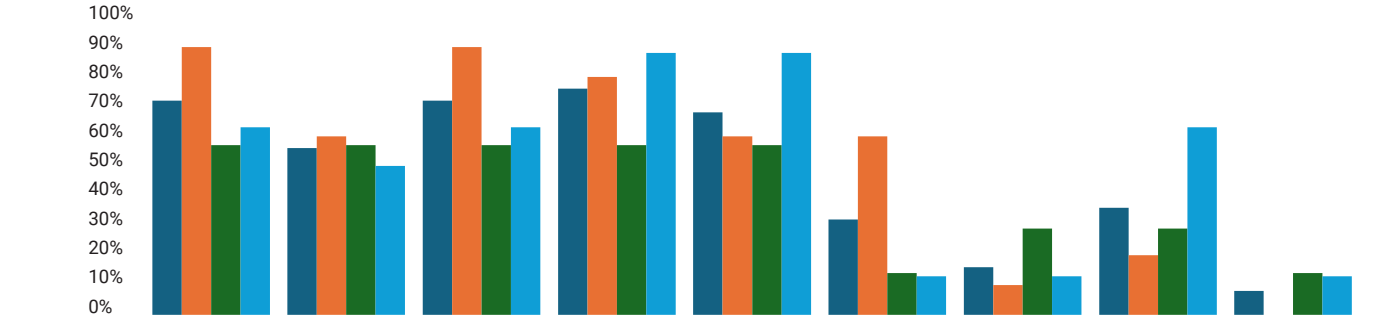
In addition to the technical expertise, employers also noted the scarcity of managerial talent, particularly in middle management as well as quality assurance roles. The lack of trained Industrial Engineers further compounds operational inefficiencies, impacting productivity and overall output quality. Moreover, the absence of specialized training in areas such as customer service, brand management, and merchandising underscored the broader skills gap prevalent in the industry.

### 3.4.5 TRAINING PREFERENCES AND PRIORITIES AMONG EMPLOYERS IN THE TEXTILE AND APPAREL INDUSTRY:

The study noted that employers in the textile and apparel industry prioritize training initiatives to enhance the skills and capabilities of their workforce. This analysis delved into the training preferences and priorities identified by employer respondents and shed light on the areas of focus within workforce development strategies.

This collaborates with what they reported has lacking above in challenges experienced at operational level. Below are the percentages for each training preference:

**Chart 7: Training Needs Among Employers in the Textile and Apparel Industry**




| | A: Multi- skilled Machine Operator s Training (4 machine types) | B: Machine Mechanic Training ( 4-5 machine types) | C: Middle Manage ment supervis ors/ line charges) | D: Quality Assurance training | E: Pattern Making and Grading | F: Industrial Engineering | G: Washing Dry & Wet Processing | H: Merchandising | Other |
|---|---|---|---|---|---|---|---|---|---|
| Overall | 72% | 56% | 72% | 76% | 68% | 32% | 16% | 36% | 8% |
| EPZ | 90% | 60% | 90% | 80% | 60% | 60% | 10% | 20% | 0% |
| Medium | 57% | 57% | 57% | 57% | 57% | 14% | 29% | 29% | 14% |
| SME | 63% | 50% | 63% | 88% | 88% | 13% | 13% | 63% | 13% |

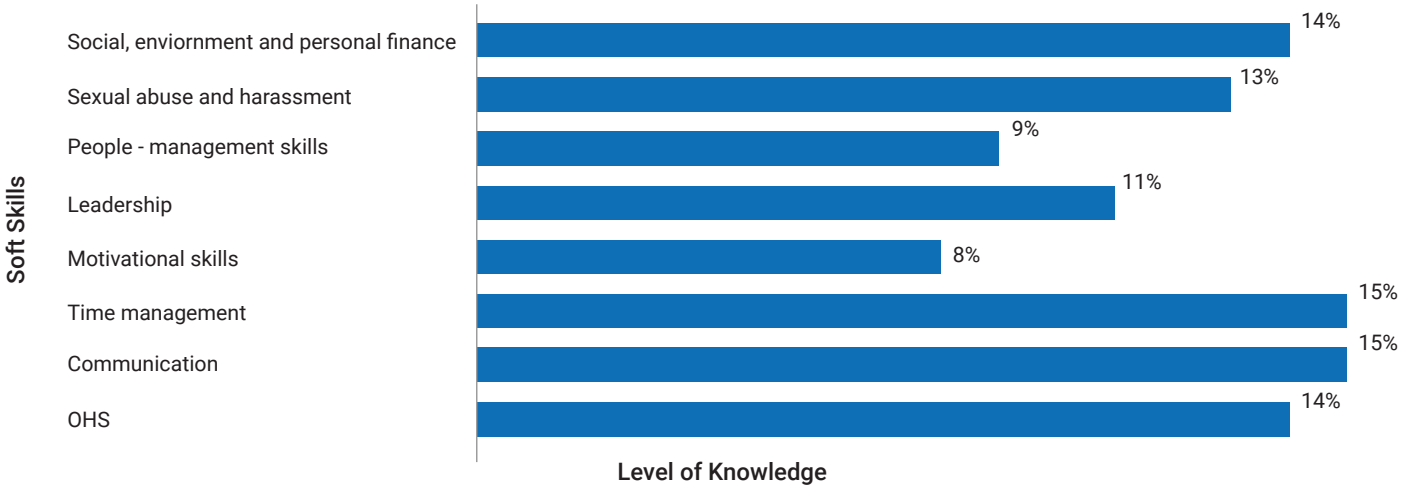
The top 3 overall priority training needs from the study are Quality Assurance (76%), Multi-skilled Machine Operators and Middle Management (both at 72%) and Pattern Making and Grading (68%). However, on segregation of the tiers, EPZ factories prioritized Multiskilled Machine Operators and Middle Management both 90%, Quality Assurance (80%) and CAD Machine Operators, Machine Mechanics and Industrial Engineers – all at 60%. Medium sized factories had a balanced need across the skills required.

In addition to the skills identified above, soft skills were also reported to be key for wholesome employee performance to enhance a harmonious work environment and by extension improve better planning and enhance productivity.

The most popular supervisory skill needed among respondents was time management and communication skills as shown in the figure below. In addition, training areas affecting Gender and Social practices are highlighted at various levels as illustrated.

**Chart 8: Preferred Supervisory Skills.**

**Soft Skills average level of knowledge**



### 3.4.6 EMPLOYEES VIEWS OF AREAS OF IMPROVEMENT:

Besides specific priority areas of skilling identified above, employees further recommended processes that can be improved to support and sustain a skilled workforce, career development and an inclusive work environment in the factories. These processes include:

i **Continuous Learning:** Employees underscored the importance of applying and enhancing their knowledge regularly, demonstrating a proactive approach to skill development. They recommended establishing staff development programs i.e. structured upskilling programs driven by the employer and conducting training on new technology.

ii **Creativity and Innovation:** Many employees expressed a desire for greater creativity and innovation. Key to this was the desire for inclusion in designing effective problem-solving process on production lines and efficient ways of work to meet target.

iii **Customer Service:** Providing excellent customer service skills is highlighted, emphasizing the significance of interpersonal skills and client satisfaction.

iv **Teamwork and Leadership:** Employees recognized the importance of training others, teamwork, and leadership skills, showcasing a collaborative approach to skill development and career advancement.

v **Time Management:** Time management skills are identified as essential for workplace efficiency and effectiveness.

### 3.4.7 TRAINING AREAS THAT NEED IMPROVEMENT.

Through conversations with industry specialists the study pinpointed key areas in training that require enhancement within the textile and apparel sector:

i. **Knowledge Transfer and Skill Development:** The necessity for effective knowledge transfer from expatriates to local supervisors and management teams was emphasized. Internal growth was preferred over external hires, as they often face challenges in integration. Additionally, ensuring the successful transmission of knowledge and skills within the company was identified as vital for enhancing competence and performance. This highlights the significance of internal training and development programs customized to meet the specific requirements of the T&A industry.

ii. **Management and Coordination Skills:** It was brought to light that within the T&A industry, there exists a critical need for the development of management and coordination skills among personnel. The study underscores the significance of capacity-building initiatives in bolstering effectiveness and efficiency in operations. Notably, emphasis was placed on the importance of investing in both software, such as management systems, and hardware, including machinery, to achieve holistic improvement. Comparisons with established international players like Sri Lanka accentuate the urgency for the T&A industry to prioritize investments in enhancing operational management.

iii. **Productivity and Quality Improvement:** The study revealed a consensus on the critical importance of enhancing productivity and meeting quality standards in the textile and apparel industry. These experts emphasized the need for improving efficiency, ensuring that products meet specifications and enhancing supervisory skills to oversee and maintain quality standards effectively. It established that addressing these areas was essential for driving overall improvements in competitiveness and performance within the industry.

iv. **Challenges in Pattern Drafting Skills and Productivity Impact:** Pattern Pattern drafting was identified as a challenging skill, with a call for tracking its impact on productivity. There was als a perceived need for institutions like NITA to assess the effectiveness of pattern drafting skills in the workplace and their contribution to productivity, rather than just measuring output daily. This presented a desire for a more nuanced understanding of how training aligns with industry demands and enhances workforce productivity.

v. **Technical Skills Training:** The findings established that there is a significant demand for technical skills training that aligns with industry requirements. This includes proficiency in areas such as computer-aided design, technical proficiency in dyeing and printing, and other essential technical competencies tailored to the textile and apparel industry.

vi. **Creativity and Design Thinking Programs:** Training programs aimed at enhancing creativity, fostering innovative thinking, and developing design skills were identified as crucial. This encompassed teaching methods that encourage individuals to generate new ideas and designs, contributing to the sector's innovation and competitiveness.

vii. **Environmental and Social Responsibility Training:** The study also recognized the need for training programs focused on environmental stewardship and social responsibility. This includes educating individuals on sustainable practices, ethical sourcing, and the importance of social responsibility within the textile and apparel sub-sector.

viii. **Enhancing Collaboration through Attachments and Knowledge Exchange:** The stakeholders recommended improvement of collaboration between training institutions and the textile/apparel industry by offering attachments for students, facilitating industry visits for instructors, and ensuring that heads of training institutions stay updated with the latest technology and equipment used by the industry. Addressing placement gaps in industries is also highlighted, with a need for better alignment between training outcomes and industry needs.

Further interviews held with training regulator regulators revealed that the National Industrial Training Authority (NITA) is mandated to regulate Industrial Training and ensure an adequate supply of skilled manpower at all levels in the textile and apparel industry. NITA engages with the sector through sector training committees primarily composed of industrial players, which aid in identifying skills needs and developing curricula for industry application. NITA conducts a minimum of four interactions with the industry annually.

The NITA survey identified key training needs within the textile and apparel sub-sector, including sewing machine operations for new operators, attitude change for workers, and supervisory skills. Despite these identified needs, several challenges were highlighted during the NITA review. These challenges include a lack of awareness or ignorance on the part of employees regarding engaging in training opportunities, financial constraints faced by new trainees in accessing skills training, and a deficiency in both quantity and modernity of training equipment available.

**Table 6: Availability of Manpower at Various Levels**

| Level | Difficult to Find Locally | Possible to find locally | Readily Available | International Resource |
|---|---|---|---|---|
| Managerial Level | | ✓ | | |
| Supervisor Level | | | ✓ | |
| Machine operator or equivalent | | | ✓ | |
| Helper / Loade Level | | | ✓ | |

**Training Skill Gaps and Needs in the Textiles and Apparel Industry:** The study identified the key gaps in enhancing skills for workers in the textiles and apparel industry as

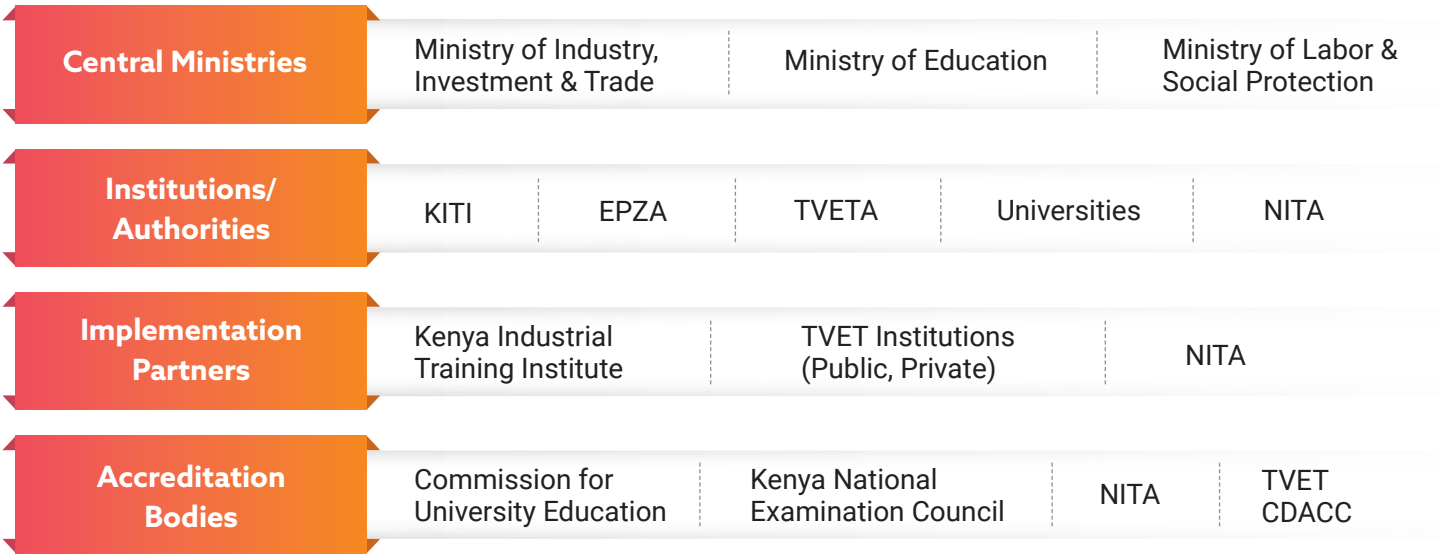
- Limited technology and infrastructure both in training institutions and in factories limits worker skills on the advanced options in the industry.
- Trainers within institutions possess strong qualifications, but their practical experience in handling industrial sewing machines and exposure to industry practices is very limited. This gap hinders industry experience and the ability to effectively train students in practical aspects relevant to the industry.
- The training curriculum in the educational institutions primarily focus on design and fashion aspects, neglecting crucial key global trends and manufacturing concepts. The current/existing curricula predominantly consist of theoretical inputs, failing to adequately prepare trainees for specific and focused job roles within the industry. This misalignment and alignment between curriculum and industry requirements is a significant gap which needs to be addressed to bridge the skills gap to the next level in the sector.
- There is a shortage of skilled middle managers in the industry. The shortage is attributed to gaps in skills development and training programs specifically targeting middle management positions. While there are training initiatives and educational programs available for entry-level workers there is a lack of focused training for individuals aspiring to become middle managers.
- Skill gaps at the different levels within the factory which increases the cost of production and reduces the firm's margins and competitive ability

# SECTION 4: SKILLING OVERVIEW IN KENYA FOR TEXTILE AND APPAREL SECTOR LABOUR FORCE

## 4.1 INTRODUCTION

In Kenya, training and education in the apparel sector are provided by various institutions, serving different levels of education and skill development. The section reviews institutions that offer training and analyzes the courses offered to promote skills in the sector. It reviews the training infrastructure, institutional facilities and the challenges they face in delivering training to the sector.

**Figure 3: Skills development ecosystem in Kenya-Apparel Sector**




## 4.2 UNIVERSITIES AND COLLEGES

According to the Commission for University Education, there are about 6 Universities offering Bachelors /Masters' Degree courses in Textiles and Apparel Sector as recorded in the table below:

**Table 7: Universities and Colleges**

| No | University | Courses |
|---|---|---|
| 1 | Kenyatta University | Bachelor of Science in Fashion Design and Marketing |
| | | Master of Science in Fashion Design and Marketing |
| 2 | Maseno University | Master of Arts in Fashion Merchandising |
| | | Bachelor of Arts in Design (Textiles & Apparel Design) |
| | | Master of Arts in Textiles and Apparel Design |
| 3 | University of Eldoret | Bachelor of Science in Apparel and Fashion Design |
| | | Master of Science in Apparel and Fashion Design |
| 4 | Machakos University College | Bachelor of Science in Fashion Design and Marketing |
| 5 | Egerton University | Bachelor of Science (Clothing, Textiles and Interior Design) |
| 6 | Moi University | Bachelor of Engineering (Manufacturing, Industrial & Textile Engineering) |
| | | Master of Science in Textile Engineering |

## 4.3 TECHNICAL VOCATIONAL EDUCATION AND TRAINING (TVET)

Technical and Vocational Education and Training (TVET) institutions in Kenya comprise National Polytechnics, Technical Training Institutes, Industrial Training Centers, Youth Polytechnics, and Vocational Training Centers. These institutions are either public or private and are regulated by the Technical and Vocational Education and Training Authority (TVETA). In Kenya, there are approximately 540 TVET institutions that have been accredited by TVETA. Out of these, 201 TVETs offer courses in the apparel sector. Among the accredited TVETs, 155 are public institutions, while 46 are private. These TVET institutions have a combined total intake capacity of 7,420 students for training in the apparel sector.

## 4.4 NATIONAL INDUSTRIAL TRAINING AUTHORITY (NITA)

There are 5 NITA Training Centers across Kenya. Out of 5, there are 2 NITA training institutions offering courses related to Apparel Sector with a total capacity to train 25 trainees in a batch.

## 4.5 KENYA INDUSTRIAL TRAINING INSTITUTE (KITI)

The Fashion Design and Clothing Technology department of KITI offers training in the Apparel Sector.

### Technical and Vocational Education and Training Authority (TVETA)

The TVETA's role is to regulate the technical and vocational education and training institutions by licensing, registering, and accrediting institutions, programs, and trainers

### National Industrial Training Authority (NITA)

The NITA mandate is to promote the highest standards in the quality and efficiency of Industrial Training in Kenya and ensure adequate supply of properly trained manpower at all levels

### Kenya Industrial Training Institute (KITI)

The courses offered at KITI are Craft Certificate in Fashion Design and Garment Making, Embroidery and Interior Decoration, Dressmaking and Tailoring

## 4.6 SUMMARY OF THE TECHNICAL AND VOCATIONAL TRAINING INSTITUTIONAL FINDINGS

### 4.6.1 PROGRAMS

The survey received feedback from both public (5) and private (1) institutions. The survey was designed to understand the status of training/education for the apparel sector, infrastructure availability and Challenges faced by the Universities/Colleges/Training Institutions for the purpose of analyzing the Gaps in training vis-a-vis industry requirements. The public institutions offer Diploma, Certificate and Vocational qualifications and the training include: - Fashion design & clothing; Garment technology, dressmaking and tailoring; Quality control and assurance; Sewing machine operator; Sewing machine mechanic; and Checkers and skills upgrading in garment making.

The general feedback was that there are frequent interactions with the industry to understand the skills required and tailor training in the institutional curriculum. On average the institution's major discussions with

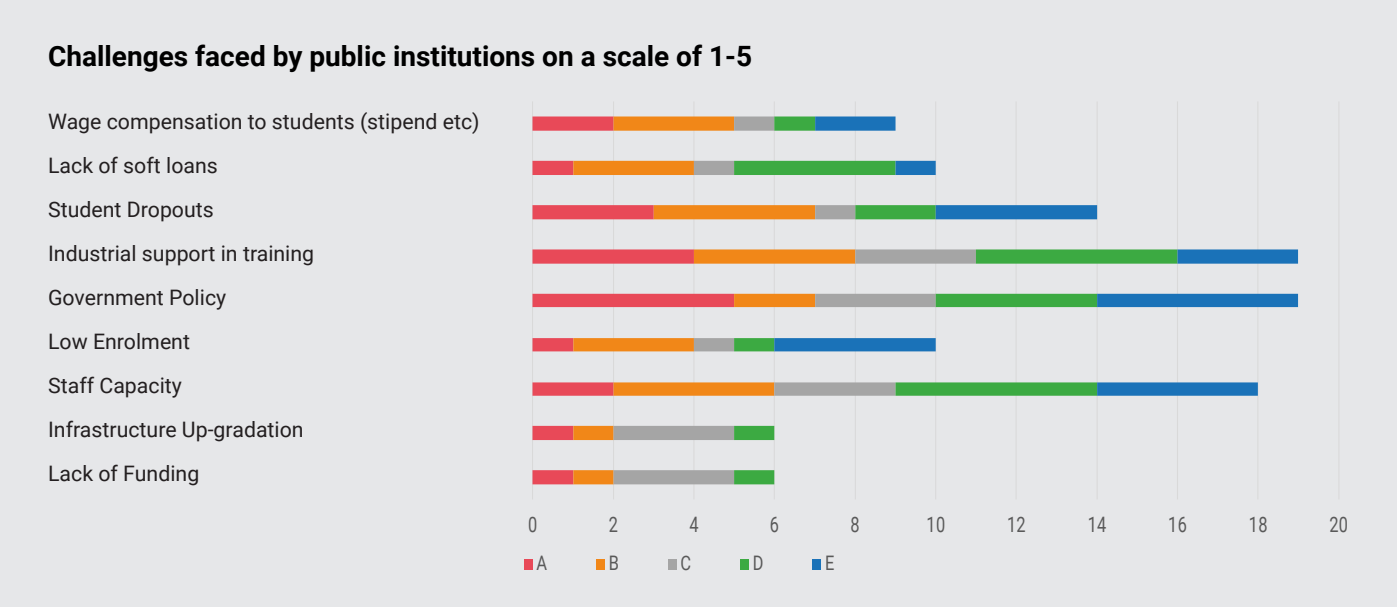
industry revolve around Curriculum development on CBET and Industrial attachments from both trainers and trainees

Whereas several institutions did not have courses that support employees in the industry, a few had courses with flex time to allow those employed. Some of the courses included Sewing Machine Maintenance; Free Hand Cutting; Hand Screen Printing; Tie and Dye and Computerized Embroidery. Some provide exemptions for: Women and persons with physical disability and minority community. Most of the students in these institutions are aged between 20 – 35 years.

The training is integrated with soft skills including creative thinking and character development and soft courses like health and hygiene, time management, career management, commitment to work, grooming and communications skills. This prepares graduates for either self-employment or jobs in industry.

The public institutions face several challenges as illustrated below:

**Figure 4: Challenges by Public Institutions**




### 4.6.2 TRAINING INFRASTRUCTURE

With the development of the apparel industry in Kenya, there has been advancements in technology, however, there is a significant disconnect of available technology and equipment in training institutions across board. In rural areas, TVETs still rely on conventional pedal-operated domestic sewing machines while the university institutions offer degree courses primarily focused on theoretical aspects due to limited or inadequate equipment. A few institutes have upgraded their training technology. The research also found that trainers are well qualified with an average experience of 5 years. They, however, lack adequate industry exposure for effective delivery of requisite skills that prepare the learners for employment.

The curriculum at university level majorly focuses on design and fashion with 70% of the course being the theoretical component. Courses at Diploma and Certificate level are academic courses.

**Table 8: Courses Offered and Gaps Identified**

| No | Course Type | Curricula Highlights | Gap Identified |
|---|---|---|---|
| 1 | Degree courses | Fashion Designing concepts only | Lack of manufacturing concepts<br>Less exposure to practical aspects |

| No | Course Type | Curricula Highlights | Gap Identified |
|---|---|---|---|
| 2 | Diploma courses | Fashion Designing, Garment Making, Soft Skills | More of theoretical inputs<br>Topics related to troubleshooting aspects Handling of industrial sewing machines.<br>Concept of ergonomics<br>Knowledge of international standards / nomenclature of Seam and Stitch Types etc. |
| 3 | Certificate courses | Fashion Designing, Garment Making, Soft Skills | Handling of industrial sewing machines<br>Concept of ergonomics<br>Knowledge of international standards / nomenclature of Seam and Stitch Types etc. |
| 4 | Tailoring / Dress Making | Construction of different garments | Handling of industrial sewing machines |

The table records Fashion Design as the most popular courses at Degree/Diploma/Certificate Level. However, the demand in the industry is resources with knowledge of apparel manufacturing (mass production) concepts.

## 4.7 RECOMMENDED STRATEGIES TO ENHANCE SKILL DEVELOPMENT IN KENYA

### 4.7.1 CLUSTERS AS LOCATION FOR SKILLS DEVELOPMENT:

One of the key requirements for improving competitiveness of the apparel sector is the improvement of labor productivity through skills development and this could be done through the cluster-based approach. The cluster-based approach to skills development in the apparel sector offers several advantages for improving the competitiveness of the industry. This is because the concentration of garment manufacturing units in Kenya is in clusters, such as the Athi River EPZ. There are also plans to have clusters in Kitui, Kisumu and Eldoret. Clusters are therefore a natural focal point for economic growth and skill development.

A key advantage of the cluster-based approach is that it allows for the pooling of resources and expertise. Skills development activities in the apparel sector often require significant investments in infrastructure, equipment, curriculum development, and training methodologies. By establishing a training center within a cluster of multiple manufacturing units, costs and resources required for requisite skill training and upskilling can be shared among the respective industry players. This would be more economically viable and feasible and would include provision of physical space to train, provision of necessary equipment, and skilled trainers.

### 4.7.2 DEMAND LED APPROACH OF TRAINING:

A demand-led training approach is essential for ensuring excellence in the skills training process. This can only be achieved when the entire program is designed and implemented using a demand-led approach. This approach means that all training activities are directly linked to addressing the specific needs of industry stakeholders.

The program should impart the skills that are most urgently required by the industry and do so consistently and up to a high standard.

It also focuses on providing state-of-the-art machinery and equipment for training and implementing rigorous Training of Trainers (ToT) programs with frequent refresher courses. This helps trainers stay up to date with the latest developments in pedagogy and the industry, ensuring they can effectively transfer relevant knowledge and skills to trainees. By adopting a demand-led approach, the skills training system can better meet the needs of both trainees and the industry, leading to improved outcomes, increased employability, productivity and enhanced competitiveness in the labor market.

### 4.7.3 DUAL TRAINING APPROACH:

This approach will combine theoretical classroom learning with practical on-the-job training, providing a comprehensive learning experience for trainees. This approach aims to bridge the gap between formal education and industry requirements, ensuring that students acquire both the necessary knowledge and practical skills to succeed in the sector.

In this approach, trainees will be placed in partnering companies or garment manufacturing units to gain practical experience. They will work alongside experienced industry professionals, learning hands-on skills and gaining exposure to real-world production processes. This practical training will allow trainees to apply the theoretical knowledge they have acquired and develop industry-specific competencies. The percentage of on-the-job training can vary from around 50% to 70% of the total training duration.

This approach will offer the opportunity for employers to identify and recruit promising talent early on, enhancing workforce development and talent retention within the sector.

### 4.7.4 MIDDLE MANAGEMENT & C-SUITE TRAINING:

The need for middle management and c-suite training in the Textile and Apparel companies in Kenya is of utmost importance for the industry's growth and success. This is because Middle managers and executives at C-suite level play critical roles in driving strategic decision-making, managing operations, and fostering innovation within the organizations. By investing in middle management and C-suite training, textile and apparel companies in Kenya can develop a pool of skilled leaders who are equipped to navigate industry challenges, drive innovation, foster operational excellence, and promote sustainable growth. There is need to develop standardized content to bridge the skilled gap in existence in this category that is highly reliant on expatriates or on the job training. This ultimately contributes to the industry's overall competitiveness, profitability, and long-term success.

### 4.7.5 STANDARD COURSE CURRICULUM:

To address skills needs of industry effectively, it is crucial to have a relevant and standardized curriculum that aligns with the demands of potential employers. Currently, various stakeholders are independently working on developing curricula based on industry needs, resulting in a lack of synergy and a fragmented approach. To address this issue, Technical and Vocational Education and Training Curriculum Development, Assessment and Certification Council (TVET-CDACC) has been established in accordance with Article 44 of the TVET Act No. 29 of 2013. TVET-CDACC is mandated to develop the Competency-Based Education and Training Framework of Kenya (CBETFK), which serves as a standardized framework for skills development.

However, during interactions with stakeholders, it was observed that the implementation of CBETFK for the apparel sector had not yet been initiated. This indicates a need for concerted efforts and collaboration among stakeholders to work on a common platform for the development and implementation of a standard curriculum specifically tailored to the needs of the apparel sector. By establishing a standardized curriculum, the industry can ensure that the skills being developed through training programs are relevant, consistent, and aligned with industry requirements. A common platform for curriculum development would enable better coordination and utilization of resources, avoiding duplication of efforts and enhancing effectiveness of skills development initiatives in apparel sector. It is essential for stakeholders, including TVET-CDACC, industry associations, training institutions, and employers, to come together and collaborate in the development and implementation of a standardized curriculum. This will help bridge the gap between industry demand and skills development, ultimately enhancing competitiveness of apparel sector and improving employability of trainees.

### 4.7.6 SKILL UP-GRADATION NEED:

Existing workforce in Kenyan garment manufacturing units is recruited mainly through the gate recruitment process having some experience of working on sewing machines. Fresh workers are recruited by industry mainly at Helper level and with some informal training and experience is upgraded to basic operators. With experience, these workers gain hand skills of sewing, however, lack insight of compliance, quality, basic machine maintenance, ergonomics etc. There is a need for skill up-gradation training of existing workers/supervisors based on the roles.

# SECTION 5: BENCHMARKING BEST PRACTICES IN IMPLEMENTATION OF SKILL DEVELOPMENT PROGRAMS

The section shows lessons from India as a benchmark in the industry. It reviews the initiatives and frameworks in the apparel sector and digs into their skilling programs and analyzes the contributions of the sector in bridging the gap for the highly needed skilled labor for both entry level and upskilling. It details deliberate steps taken by India in funding skills development for the sector and creating legal and institutional frameworks to support the sector.

## 5.1 CASE STUDY-INDIA

The survey used India as a case study because it is among the largest textile and apparel industries in the world and a significant contributor to India's economy and employment generation. To give context,

The Indian Ministry of Textile (MOT)[14]. In its Annual Report 2022-2023 indicates total textile and apparel exports at USD 44.4bn (including handicrafts) for the period 2021-2022. India's apparel market has experienced a surge in demand for sustainable and ethically produced clothing, driven by increasing consumer awareness and a shift towards conscious consumerism. It is anticipated to grow annually by 3.81% (CAGR 2024-2028) (Statista). According to the WTO's World Statistical Review 2023[15] India was the world's 5th largest exporter of clothing in 2022 (exports valued at USD 18bn). The Indian textile and apparel market size is estimated at USD 165bn. The sector is the second largest employer in the country with an estimated number of 45mn directly employed in the sector.

The Indian government has taken steps to enhance exports and by extension increase cost competitiveness on the international market and create better employment opportunities in export-oriented manufacturing industries.

The Indian textile and apparel industry is highly diversified with a wide range of segments ranging from products of traditional handloom, handicrafts, wool and silk products to the organized textile industry manufacturing.

As a result, India has quite remarkable experience and expertise in skill development to meet the industry's demands. The textile and apparel sector in India employ a vast and diverse workforce to cover this widely segmented sector.

Notably the Indian government has taken several proactive measures including funding to promote skill development in the country.

**India's Apparel Market**

**3.81%**
**CAGR 2024-2028**

**USD 165bn**
**Estimated Market Size**

**45m**
**Directly Employed**

[14]Refer English Final MOT Annual Report 2022-2023 - https://texmin.nic.in/

[15]https://www.wto.org/english/res_e/booksp_e/wtsr_2023_e.pdf

[16]https://www.msde.gov.in/en/about-msde

## 5.2 SKILL DEVELOPMENT INITIATIVES & FRAMEWORK WITH A FOCUS ON THE APPAREL SECTOR IN INDIA

Coordination of Skill Development in India is domiciled under the Ministry of Skill Development and Entrepreneurship (MSDE)16 . Under its vision 'Skill India', the ministry aims to have the country achieve large-scale skilling through various arms. The arms supporting these initiatives include the Directorate General of Training (DGT), National Council for Vocational Education and Training (NCVET), National Skill Development Corporation (NSDC), National Skill Development Fund (NSDF) and 37 Sector Skill Councils (SSCs) as well as 33 National Skill Training Institutes (NSTIs/NSTI(w)), about 15000 Industrial Training Institutes (ITIs) under DGT and 187 training partners registered with NSDC.

The ministry also works with various networks in Skills Development, learning institutions, other relevant government bodies, international organizations, NGOs and industry.

Skill Development Corporation (NSDC), National Skill Development Fund (NSDF) and 37 Sector Skill Councils (SSCs) as well as 33 National Skill Training Institutes (NSTIs/NSTI(w)), about 15000 Industrial Training Institutes (ITIs) under DGT and 187 training partners registered with NSDC.

The courses offered under this initiative are aligned to both the standards of the industry and the government under the National Skill Qualification Network (NSQN). It ensures that all Skill Development Programs in the country are aligned and standardized under common norms. The ITI ecosystem has been put under this initiative for better results in vocational training.

**The 'Skill India' initiative**

**aims to empower youth with skill sets that enhance their employability and productivity at work.**

The MSDE has several schemes and initiatives under its mandate that are divided under Short Term and Long-Term schemes/initiatives and Apprenticeship Training that serve the diverse industries to meet respective industry needs and target youth.

**i. Short Term Training Schemes/Initiatives:** The initiative, Pradhan Mantri Kaushal Vikas Yohana (PMKVY), was launched in 2015 to encourage and promote skill development by providing free short duration skill training and incentivizing this by providing monetary rewards to youth for skill certification. Key components include:

**Short term training (2-6 months):** These model centers target school dropouts or unemployed youth. There is also placement assistance by Training Partners.

**Recognition of Prior Learning (RPL) (12-80 hours):** This aims to align competencies of the unregulated workforce to the NSQF. Individuals with prior experience or skills are assessed and certified.

**Special Projects:** This encourages training in special areas in special job roles not defined under the available Qualification Packs/ National Occupational Standards.

Under the short-term training, we also have the Jan Shikshan Sansthan (JSS) scheme. This is implemented through the NGO network in the country. This targets the non-literates, neo-literates, unskilled and unemployed youth and women who are underprivileged especially in the rural areas.

### ii. Long Term Training Schemes/Initiatives:

**Craftsmen Training Scheme (CTS):** This scheme runs through the Directorate of General Training (DGT). This was introduced to ensure a steady flow of skilled workers in different trades for the domestic industry to reduce unemployment among the youth by providing them employable skills. This is administered through the vast network of ITIs.

**Crafts Instructor Training Scheme (CITS):** This targets training instructors on both the skills and the methodology.

**Advanced Vocational Training Scheme (AVTS):** This is an upskilling program that targets industrial workers through short-term modular courses of 1-6 weeks duration.

**Vocational Training Program for Women:** This deliberately aims at stimulating employment opportunities among women of various socio-economic levels and age groups.

**Apprenticeship Training**

## 5.3 SKILL DEVELOPMENT PROGRAMS– TEXTILE AND APPAREL

The Directorate of General Training (DGT) in the Ministry of Skill Development and Entrepreneurship (MSDE), is the apex body mandated to develop and coordinate national level programs relating to vocational training including women vocational training. DGT runs the Craftsmen Training Scheme (CTS). The CTS courses and short-term courses are as below:

**Table 9: CTS Apparel Sector Courses**

| No. | Name of the Trade | Minimum Qualification Eligibility | Unit/ Batch Size | NSQF level | Duration (1 yr & Hrs) | Year for NSQF Approval | Year of Review |
|---|---|---|---|---|---|---|---|
| 1 | Computer Aided Embroidery & Designing | Passed 10th class examination or its equivalent | 24 | 3 | 1,200 Hrs | 2018 | 2022 |
| 2 | Cutting & Sewing (VI & OD) | Passed 8th class examination (Candidate should be of visually impaired) | 12 | 3 | 1,200 Hrs | 2018 | 2022 |
| 3 | Dress Making | Passed 8th class examination | 20 | 3 | 1,200 Hrs | 2015 | 2022 |
| 4 | Fashion Design and Technology | Passed 10th class examination | 20 | 3 | 1,200 Hrs | 2018 | 2022 |
| 5 | Sewing Technology | Passed 8th class examination | 20 | 3 | 1,200 Hrs | 2015 | 2022 |
| 6 | Surface Omentation Techniques Embroidery) | Passed 8th Class examination | 20 | 3 | 1,200 Hrs | 2015 | 2022 |

**Short Term Apparel Sector Courses**

| No. | Name of the Trade | Minimum Qualification Eligibility | Unit/ Batch Size | NSQF level | Duration (1 yr & Hrs) | Year for NSQF Aproval | Year of Review |
|---|---|---|---|---|---|---|---|
| 1 | Clothing Artisan | Passed 8th Class | 25 | 4 | 480 Hours | 2020 | |
| 2 | Digital Fashion Portfolio Designing (Blended Mode) | NTC/NAC in Fashion Design Technology or Apparel sector trades. OR | 20 | 5 | 720 Hours | 2020 | |
| | | Degree/ Diploma (minimum one year) in Apparel sector. | | | | | |
| 3 | Aari and Zardosi Embroidery | Passed 8th Class | 20 | 4 | 320 Hours | 2020 | |

It is worth noting that all trainees under CTS must undertake an Employability Skills course (60 hrs.).

## 5.4 MINISTRY OF TEXTILE (MOT) SKILL DEVELOPMENT SCHEMES:

To meet the skill gap in the textile and apparel industry, the government through the MOT approved a new scheme in 2017 – Scheme for Capacity Building in Textiles Sector (known under the name Samarth). This scheme was extended to 2024. This scheme broadly operates under the CTS skilling policy and framework. The objective of this scheme is to provide demand driven placement-oriented skilling programs to supplement efforts of the industry in creating employment in textile and related sectors, covering the entire value chain of textiles for both entry level and upskilling reskilling training.

The scheme is majorly implemented through the following implementing partners: State Government Agencies; Institutions/Organizations of MOT; and Textile Industry/Industry Associations. *(refer Guidelines for Samarth -Scheme for Capacity Building in Textile Sector (SCBTS) – 2017-2020 and List of Courses Under Samarth 01.02.2022 Entry Level)*

# SECTION 6: CONCLUSIONS AND RECOMMENDATIONS SUMMARY

## 6.1 RESEARCH CONCLUSIONS

In Kenya, training and education in the apparel sector are provided by various institutions, serving different levels of education and skill development. The section reviews institutions that offer training and analyzes the courses offered to promote skills in the sector. It reviews the training infrastructure, institutional facilities and the challenges they face in delivering training to the sector.

A. The textile and apparel sector in Kenya faces significant challenges, including a critical shortage of skilled labor (from the operator level to middle management), productivity challenges, and high operational costs.

B. Working conditions for employees vary, with a significant portion rating their conditions as good or excellent, but concerns exist regarding remuneration, job security, employee management, employee welfare and working hours.

C. Employer-employee engagement dynamics are crucial and need enhancement, and ongoing discussions cover crucial aspects such as pay, work environment, disputes, and production targets.

D. There is a significant demand for skill development programs within companies, indicating a recognition of the importance of enhancing workforce capabilities.

F. Although 65% of the employers who participated in the study confirmed existence of Gender and Social Inclusion practices policies, the study could not conclusively verify existence of structures to support this policy.

## 6.2 RECOMMENDATIONS

The Skills Needs Assessment (SNA) report outlines a comprehensive set of recommendations to address key challenges and gaps in the textile and apparel sector in Kenya, focusing on enhancing worker well-being, improving dialogue between workers and management, developing skill qualification frameworks, establishing Centers of Excellence, monitoring skill development programs, and engaging in resource mobilization efforts:

A. **Enhancing Worker Well-being:** Implement holistic interventions to enhance worker well-being, addressing challenges related to remuneration, job security, employee welfare, employee management and working hours. Over 62% of respondent employers confirmed the existence of Worker Committees (employee representative structures). This can be strengthened by developing and including improved gender and social inclusion initiatives and structured welfare support for workers.

B. **Improving Dialogue:** Foster improved dialogue between workers and management through structured feedback mechanisms and outcomes sharing.

C. **Developing Skill Qualification Frameworks:** Develop and standardize skill qualification frameworks, occupational standards, and qualification packs address the identified skills gaps within the sector. By aligning training.

**D. Pilot:** For quick wins, develop and strengthen the existing curriculum in line with current industry demands.

i. Strengthen Curriculum: Examples include Generation Kenya Sewing Machine Operator and the NITA Textile Training Institutes curriculum for entry level garment making jobs that can be designed to encourage and enhance multi-skilled operators for the sector manufacturers. This is demonstrated by 72% of the respondents expressing a need for multi-skilled machine operators for at least 3-4 machines. It is estimated that this process will take a period of two months to fully integrate into the current curriculum.

ii. Develop Curriculum in consultation with key \ stakeholders (KAM, NITA, sector Employers, Generation Kenya and Industry experts) for most pressing skill roles identified in the research as articulated. Over 72% of the respondents expressed the need for skilled Quality Assurance and Supervision/Middle Management. It is estimated that this process will take at least six months before a pilot role out.

iii. Upskilling existing employees to be multi-skilled machine operators in requisite factories. It is important to note that the demand varies from factory to factory depending on the style of operations/ production needs.

iv. Develop and include Gender and Social practices norms in the curriculum and business best practices for both employees and management.

**E. Establishing Centers of Excellence:** Establish Centers of Excellence through pooling of resources from various stakeholders in the sector to pilot implementation of the skill development framework which will include training centers to deliver quality training programs aligned with industry needs. These centers will serve as hubs for skill development, innovation, and best practices in the sector.

**F. Monitoring and Continuous Improvement:** Monitoring, tracking, and continuously improving skill development programs based on feedback and outcomes. These are essential for ensuring the effectiveness and relevance of training initiatives. By evaluating program outcomes and making necessary adjustments, organizations will enhance the impact of skill development efforts.

**G. Resource Mobilization:** Engage in resource mobilization efforts to support the implementation of the action plan, including collaboration with government agencies, industries, and private sector stakeholders. By leveraging resources and expertise from various partners, organizations can strengthen their capacity to implement skill development initiatives and drive sector-wide improvements.

These recommendations aim to address the identified challenges and gaps within the textile and apparel sector in Kenya, ultimately contributing to the enhancement of workforce capabilities and the overall competitiveness and sustainability of the industry.

# SECTION 7: IMPLEMENTATION FRAMEWORK AND ACTION PLAN

## 7.1 IMPLEMETATION AND ACTION PLAN MATRIX

Following the findings from this survey, the following is a recommended action plan and implementation framework to address the identified challenges and create a sector specific intervention that addresses a standardized skill development framework across the industry and worker well-being.

**Table 10: Implementation Framework**

| Item | Description |
|---|---|
| Goal | To pilot a comprehensive skill development program that addresses identified gaps and enhances workforce capabilities within the textile and apparel sector in Kenya. |
| Objective | To test and evaluate the effectiveness of the skill development program in improving worker well-being, addressing skills gaps, and enhancing industry competitiveness. |
| Input | • Collaboration with key stakeholders<br>• Industry expertise<br>• Resource mobilization<br>• Government support |
| Activities | **Formation of a Technical Steering Committee**<br>• Establish a committee comprising key stakeholders to oversee the pilot program<br>• Define roles and responsibilities of the committee members. |
| | **Identification of Pilot Training Centers**<br>• Select specific locations for piloting the skill development program based on industry demand and potential.<br>• Assess infrastructure requirements for the training centers. |
| | **Development of Pilot Training Programs**<br>• Design and develop training programs tailored to meet the identified skills needs in the sector. (Refer recommendation 6.2 above)<br>• Ensure the programs are aligned with industry requirements and standards. |
| | **Engagement of Implementing Partners**<br>• Collaborate with implementing partners to deliver the pilot training programs.<br>• Vet and select partners based on their capacity to deliver quality training aligned with industry needs. |
| | **Training of Trainers for Pilot Program**<br>• Conduct a training program for qualified industry consultants to train trainers who will deliver the pilot skill development programs. |
| | **Implementation of Pilot Training Programs**<br>• Roll out the pilot training programs at the identified training centers.<br>• Monitor and track the progress of the programs. |
| | **Evaluation and Feedback Mechanisms**<br>• Establish mechanisms for collecting feedback from participants, trainers, and industry stakeholder<br>• Evaluate the effectiveness of the pilot programs based on predefined criteria. |

| Item | Description |
|---|---|
| Outputs | • Established Technical Steering Committee<br>• Identified and equipped Pilot Training Centers<br>• Developed and implemented Pilot Training Programs<br>• Engaged and vetted Implementing Partners<br>• Trained Trainers for the Pilot Program<br>• Implemented and Monitored Pilot Training Programs<br>• Collected Evaluation and Feedback Data |
| Outcomes | • Improved workforce capabilities and skills<br>• Enhanced industry competitiveness<br>• Enhanced worker well-being and job satisfaction<br>• Identified areas for program improvement based on feedback and evaluation |
| Impact | • Sustainable and scalable skill development programs<br>• Reduced skills gaps and shortages within the industry<br>• Enhanced productivity and growth of the textile and apparel sector<br>• Improved industry standards and workforce capabilities |

**Table 11: Action Plan**

**GOAL**

To enhance workforce capabilities and address skills gaps within the textile and apparel sector in Kenya

**OBJECTIVE**

To develop and implement a comprehensive skill development program that aligns with industry needs and enhances worker well-being

**INPUT**

Collaboration with key stakeholders, resource mobilization, industry expertise, and government support.

| No. | Activity Categories | Actions | Outputs | Outcomes | Impact |
|---|---|---|---|---|---|
| 1 | Formation of a Sector Technical Steering Committee (Membership from key stakeholders including Ministry of Investments, Trade and Industry, EPZA, NITA, Sector Industries, TVETA, KAM, and Identified Implementing Partners in the sector | Creating institutional mechanisms, supervising and monitoring the implementation of recommendations, and resource mobilization | Established Technical Steering Committee | Standardized and industry-aligned skill qualification framework | Enhanced petitiveness of the textile and apparel sector |
| 2 | Identify and Finalize Skill Qualification Framework | Set up a Sector Skill Committee to develop and standardize course content for identified skill sets. | Finalized Skill Qualification Framework | | |
| | | Develop Occupational Standards and Qualification Packs. | | | |
| | | Establish an assessment and certification framework. | | | |
| 3 | Identify Training Center Location(s) for Pilot | Identify infrastructure required for training centers. | Identified Training Center Location(s) for Pilot | Well-equipped and recognized training centers | |
| | | Brand the training centers to create visibility and recognition | | | |
| 4 | Identify Implementing Partners | Develop criteria and mechanisms for vetting implementing partners to ensure quality training delivery. | vetted Implementing Partners | Quality training programs delivered by vetted partners | Improved workforce productivity and well-being |
| 5 | Training of Trainers Program | Conduct a program for qualified industry consultants to train trainers who will deliver the Skilling Programs. | Trained Trainers | | |
| 6 | Skill Upgradation Training | Recommend a 60–80-hour training program for existing workers to upgrade their skills. | Implemented Skill Upgradation Training | Enhanced skills and capabilities of the workforce | Reduced skills gaps and shortages within the industry |

| No. | Activity Categories | Actions | Outputs | Outcomes | Impact |
|---|---|---|---|---|---|
| 7 | Monitoring, Tracking, and Continuous Improvement Mechanisms | Establish mechanisms for monitoring and tracking the progress of the skill development programs. Implement continuous improvement strategies based on feedback and outcomes. | Monitoring and Tracking Mechanisms | Improved monitoring and tracking of skill development programs. | Sustainable growth and development of the sector |

## 7.2 IMPLEMENTATION RISKS AND MITIGATIONS

In the context of the implementation framework and action plan outlined in the report, it is essential to consider potential risks that may arise during the execution of the proposed initiatives. Below is a detailed risk framework highlighting specific risks, their levels, and corresponding mitigation. By proactively identifying these risks, assessing their potential impact, and implementing targeted mitigations, stakeholders will enhance the likelihood of successful implementation of the action plan and achieve the desired outcomes outlined in the report.

**Table 12: Risk Matrix**

| Item | Risk Level | Description |
|---|---|---|
| Lack of Stakeholder Engagement | High | Ensure active involvement and buy-in from key stakeholders by conducting regular stakeholder consultations, providing clear communication channels, and addressing concerns promptly to maintain engagement throughout the implementation process. |
| Insufficient Resource Allocation | Medium | Conduct a thorough resource assessment at the outset, establish a realistic budget, prioritize resource allocation based on critical needs, and explore partnerships or funding opportunities to supplement resources as needed. |
| Resistance to Change | Medium | Implement change management strategies, including communication plans, training sessions, and employee engagement initiatives to address resistance, build awareness of the benefits of the proposed changes, and foster a culture of adaptability. |
| Inadequate Monitoring and Evaluation | High | Develop a robust monitoring and evaluation framework with clear key performance indicators (KPIs), regular progress assessments, feedback mechanisms, and reporting structures to track the effectiveness of interventions, identify issues early, and make informed decisions for course corrections. |
| Skill Shortages in Implementation Teams | Medium | Conduct skills assessments of implementation teams, provide targeted training and capacity-building programs, leverage external expertise or consultants where necessary, and ensure a diverse team composition to cover a range of required skills and knowledge areas. |
| Regulatory Changes or Compliance Issues | High | Stay informed about relevant regulations, conduct regular compliance audits, engage legal counsel for guidance, establish internal controls and processes to ensure adherence to legal requirements, and adapt strategies promptly in response to regulatory changes. |

# Generation

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