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SKILL GAP ANALYSIS IN GARMENT MANUFACTURING MSME SECTOR OF ANDHRA PRADESH

DR. MADHUSUDHAN RAO PROFESSOR VIGNANS UNIVERSITY VADLAMUDI

ABSTRACT

The economic growth and social development of India mainly depends on the skill development activities to the youth. It is easy to create employment opportunities to more than 120 lakhs of youths entering working age yearly in India, by carrying out proper skill gap analysis and suitable development programmes. As per the skill gap study report over 2010 - 2014 of National Skill Development Cooperation (NSDC), there is an overall additional net requirement of 109.73 million trained persons across twenty-four key sectors in India. By 2022 in the Textiles and clothing sector alone there is a requirement of 63.1 lakhs of skilled manpower among the additional trained persons. In the textiles sector alone in India an estimated 330 lakhs of people are employed. Out of the total employment in textile sector the Ready Made Garment sector is estimated to contribute 25%. As per the recent studies, about 50 percent are women, among the total number of persons employed in Handlooms, Handicrafts, and Sericulture. At present, the MSME sector contributes approximately 15% of the overall employment and 45 % of India's exports. Hence this sector is important for the success of the 'Make in India' program. The Garment manufacturing sector is one of the important sectors in MSME in employment generation to women and skill development requirement. Skills in this sector can be acquired through both formal and informal channels. In this process of skill development, the institutes and industries are facing challenges in identifying skill gap and filling the same. In this context this paper is prepared to identify a few ways of carrying out skill gap analysis and issues related to Garment manufacturing units in the Andhra Pradesh. Some of the gaps identified in this sector are: Lack of proper knowledge of varieties of seams and stitches, sewing machine operations, capability to work across various machines and to stitch the full garment is missing etc.

KEYWORDS

skill, skill gap, issues.

INTRODUCTION

or the economic growth and social development of any country, skill development is essential. In India only 27 lakhs net additional jobs were created during the 7 year period of 2005-12. The youth of India are required to acquire necessary skills and education to fit for the employment ready workforce in the future. A huge skill gaps are existing between the industry requirements and the skill set level of workers. This may be due to the varies reasons like insufficient training facilities, improper mix of education and skills, outdated curricula, limited industry institute interaction and standards, etc.

The state of Andhra Pradesh (AP) produced 5.45 million bales of cotton (bales of 170 Kg each) in 2011-12 and it is one of the leading states in the country. In AP the superior long staple and medium grade and varieties of cotton are predominantly grown. The AP Government has identified the textile sector as one of its long term growth engines for the state.

AP is having fourth highest number of textile mills in the country. This state is the third highest producer of raw silk and, fourth highest producer of wool in the country. It has become one of the leading Textile Processing Centers, by possessing over a 100 units and with a total processing capacity of 130 lakhs meters of cloth per annum.

For utilizing the potential of this sector the AP Government has already established a Textile Park and several Apparel Export Parks (AEPs). The state government has identified fabrics, furnishings and apparels, as potential products. The AP state is able to export total handloom &textiles worth of around US\$ 400 million in 2010-11.

LITERATURE REVIEW

Skill is an ability and capacity acquired by deliberate, systematic, and sustained effort. To carryout complex activities or job functions smoothly and adaptively cognitive, technical and interpersonal skills are required for youth.

Claudia Goldin and Lawrence Katz (1998) argue that the spread of batch and continuous-process methods of production increased the demand for skills. They also specified that the demand for unskilled manual workers in many hauling, conveying, and assembly tasks has reduced due to switch over from steam and water-power energy sources to electricity. During this period, the scope of capital-intensive industries expanded with the sharp fall in the price of electricity and thereby enhancing the demand for skilled employees. The rapid increase in the importance of white-collar and clerical occupations gave another boost to the demand for skills. Harry Jerome (1934) from his experience of the 1920s, generalized argued that the effect of further mechanization will raise the average skill required for the employees.

The early twentieth-century evidence was so powerful that Zvi Griliches (1969) suggested capital and skills are intrinsically complementary. Richard Nelson and Edmund Phelps (1967), Finis Welch (1970), Theodore Schultz (1975), and Jan Tinbergen (1975) also argued that technological developments increase the demand for skills

Thomas Kochan, David Finegold, and Paul Osterman (2012) have mentioned that Labor market experts of US estimated that as many as 25 million, or 47%, of all new job openings from the year 2010 to 2020 will fall into the middle-skills range. Shortages of workers for these types of jobs are already undermining U.S. competitiveness and causing firms to shift their operations abroad.

The country's competitiveness is decreasing and worsening income disparity is enhancing due to an acute shortage of trained people to fill millions of openings for technical jobs. They also suggested that by designing collaborative programs, involving the multiple employers of that region or industry sector, educational institutions, and other players like employee unions and governments will help in increasing the availability of skilled manpower. Hence by considering the above examples the need for skill gap analysis to the country like India is identified.

A skill gap is a gap between what employers need and their employee's ability to do. The 'skills gap' is the term used to distinguish between the skills that employers want and those that are available from workers seeking for a job.

The task will not be completed satisfactorily if an employee does not possess the required critical skill. The possession of critical skill allows a worker to continue to continue his/her work.

ILO report of G20 (2010) describes that skills development increases both people's capacities to work and their opportunities at work. The skill development offers more scope for creativity and satisfaction to the worker at work. The future growth and prosperity of any country depends ultimately on the number of persons in employment and their productivity levels at work. The workers will learn the "right" skills required for the evolving demands of labour markets if we establish a good fit between skills development, vocational education and training. The skill acquired in this method will help the worker in getting good employment opportunities in organizations and workplaces in different economic and industrial sectors.

To enhance the skill set level, an effective partnership between employers' governments, and training institutions, workers' organizations, are critical. The wide and continued access to skills development and training institutions to women and men of all ages will fulfill the skill gap and leads to realization of their aspirations. Skill development in India report (2015) by FICCI, mentions that India is presently facing a double challenge of shortage of highly-trained quality labour, and non-employability of educated manpower due to their less or no job skills. The issue of skill development in India is related to both to the demand and supply side. To

face the demand side challenge, the government is putting consistent efforts towards expansion of economic activities and creation of large employment opportunities. A large number of unemployed youth will represent the supply side. However, the major area of concern in India is the employability quotient of this youth.

The existence of a large skill gap between the level of skills possessed by workers and industry requirements in India is a common phenomenon. This may be due to various reasons like inadequate training facilities, improper mix of education and skills, outdated curricula, limited institute industry interaction etc. The qualitative as well as quantitative skill gaps will further widen in future in India. In order to reduce this gap, proper efforts to be made for addressing the supply related key issues.

According to NSDC report of 2010 the present economic and demographic profile of AP presents a large opportunity for skilling of manpower. By 2022 this state is expected to have a workforce of around 444 lakhs. The new workforce that is going to be added by 2022 will have 85% of minimally skilled and the rest will be of either semi-skilled or skilled. The estimated incremental demand for manpower in AP is to be around 47.64 lakh by 2022. After going through the available literature it is observed that, a huge requirement exists for skill development training in Garment manufacturing sector in AP. Skill gap analysis is essential to design the skill development programmes. Hence this paper was prepared by looking into present and future employment potential and the existence of large skill gap in the Garment manufacturing sector of Andhra Pradesh (AP).

NEED FOR SKILL DEVELOPMENT IN INDIA

As per NSDC skill gap study the Textiles and clothing sector alone employment in 2013 is 15.23 million and it is projected to grow upto 25.54 million by 2022. This will result in incremental employment requirement of 10.31 million by 2022.

At present the size of formally skilled workforce available in India's is very small. Only 6.8 % of persons aged 15 years and above have received or were receiving vocational training in India as per the latest survey of the Labour Bureau for 2013-14. Out of this only 2.8 % has got training through formal channels and 4 percent through informal system. The skilled workforce available in other countries like Korea (96%), Germany (75%), Japan (80%) and United Kingdom (68%) are much higher than India.

In recent years India has started strengthening its base as a knowledge economy. Hence there exists an additional requirement to the highly skilled manpower in the sectors like Bio-technology, Healthcare and Pharmaceuticals and financial services, IT/ITeS. The sector like Garment manufacturing requires highly skilled manpower with recent initiative of 'Make in India'. In order to reduce the qualitative as well as quantitative skill gaps, there is need for increasing efforts towards addressing the key supply related issues.

OBJECTIVES OF THE STUDY

- To assess skill gap at the Garment manufacturing units of AP.
- 2. To study the actual scenario of skill gap both in terms quantitative as well as qualitative manpower estimates and their required skills.
- 3. To carry out skill gap analysis.
- 4. To define and refine the skills employees required at present and in the future.
- 5. To identify the critical skills, the employees needed.

LIMITATIONS TO THE STUDY

Majority of the key employers are not ready to share the data on number of vacancies and demand. There are chances to the secondary data available with the departments to become obsolete and mismatch. It may occur, if the data on a particular indicator is collected from two different sources.

METHODOLOGY ADOPTED FOR SKILL GAP ASSESSMENT AND PREDICTION

A detailed approach and methodology has been developed for a skill gap assessment and prediction by considering the scope of work outlined in the previous section. The study conducted is based on data from primary as well as secondary sources. The primary data is collected by using structured questionnaires and qualitative approaches like in-depth interviews. The secondary data has been gathered from sources and reports like Planning Commission, Census data and Statistical Abstract, Directorate of Economics & Statistics of AP and NSDC.

The study considers the present and future potential for employment generation in Garment sector, and the absorption of semiskilled, minimally skilled and skilled manpower into this sector. This study examines the three critical parameters like demand-side, supply-side and support-side.

Demand-side parameters include present and potential trends in investment, FDIs, production and consumption patterns and growth patterns related to Garment sector.

Supply-side parameters considered are availability of workers with their skill set level, specialization and qualification. It also considers the need for possible skill enhancement and adoption of new technologies suitable to the current demand trends.

Support-side parameters like facilities available for vocational training and access to them, the opportunities for learning. It also considers the quality of services they provide and their adoption of new technology.

The interplay of the above three parameters in two different scenarios of a growing market and a receding market are examined. One can observe increase in investments, expansion of certain sectors, opening of new industries and mobility of the workforce in upward direction is a common phenomenon in a growing market scenario. This will result into corresponding rise in the supply side, with an increase in demand for new skills and training courses. This may result in increase in the number of VTIs and options for training courses and up-gradation of technology in the support side. In case of a slowdown, the demand-side parameters may show negative trends. In such scenarios, fall in investments in the workforce or skill up-gradation programmes will happen. The support side will react by minimizing expansion of Vocational Training Institute (VTI) and adopting a more viable financial model.

SKILL GAP ANALYSIS

In present scenario the skill gap analysis is playing great role in garment manufacturing industry because they are unable to get the highly skilled manpower. Organizations are setting the layout with some required number of workers, each and every person have their own job responsibility that too chain link operations. In this scenario, even any one operator was absent means, if they get same skilled operator the production will run smoothly otherwise that operation will become major bottleneck for that area and delay may occur in other connected areas of production. The production and supply chain of textiles industry is very vast and one facet of the industry is different to another in varied skill sets for manufacturing of the products. Garment /Apparel industry requires specialized job roles for cutting, stitching, washing, packing etc. for apparel making. Further, each skill level has been segmented into different levels depending upon the importance and assigned role in the supply chain. For ex. the cutting activities in Garment industries by job roles like cutting, cutter, cutting master etc. Hence, there is a need to have mapping of the occupations based on the activities performed and skill level required in the production process. The occupational mapping of this sector may bring about an overview in the different manpower's required by each segment of the industry.

In order to study the textiles and clothing industry requirements of skilled manpower for each job role and the present availability in the labor market, a Skill gap analysis for each job roles has taken up. The skill gap analysis will provide detailed information on present available workforce on each job role, industry requirements, may also project the future requirements of each job role etc. Accordingly, the demand and supply gap in the skilled workforce may be identified for bridging the gap by means of skill development. The skill gap analysis may also help in developing measures to make a balance between supply and demand of job roles.

The skill gap analysis was conducted by survey method by circulating structured questionnaire to the employers. While designing the structured questionnaire the current and the future skill requirements of the Garment manufacturing industry in AP are considered. The analysis carried out for knowing the linkages of industry

with VTIs, exchange of employment and other sources for absorption of workforce and retention. This study would highlight the gap between emerging skill pool and industry requirement.

In-depth interviews are conducted by circulating the questionnaire to the senior officials of industry associations. They emphasized the need for improvement of currently used technologies in production. Some of the important findings were as follows:

The current training methods followed by private and government institutes don't match the skills required by the Garment manufacturing industry. More focus should be kept on trades of Garment manufacturing.

There is a lot of scope for self-employment in the garment manufacturing sector in the state of AP. Hence, awareness camps are needed to conduct through government-sponsored schemes.

The Production process in Garmenting is: Cutting-Stitching-Assembling-Finishing.

The production and supply chain of textiles industry is very vast and one facet of the industry is different to another in varied skill sets for manufacturing of the products.

For example-The NSL garment manufacturing company requires specialized job roles for cutting, stitching, washing, packing etc. for apparel making. Further, each skill level has been segmented into different levels depending upon the importance and assigned role in the supply chain. The job roles like cutting, cutter, cutting master etc. Similar is the case for weaving and knitting industry and other value chain activities. The occupational mapping of this sector may bring about an overview in the different manpower's required by each segment of the industry.

For example, there is huge demand in the Garment manufacturing industry for in the role of an "Operator".

Skills required by an Operator are as follows:

- Knowledge of threading of sewing machine, seaming garment components together in various fabrics, stitching on different shapes to standard Knowledge
 of machine maintenance procedures good machine control;
- 2. Knowledge of Draping Grading and Pattern making;
- 3. Knowledge of Computer Aided Design& Pattern Development;
- 4. Complete garment sewing ability.

Skill gaps identified are as follow:

- 1. Less knowledge about sewing machine operations, and various types of seams and stitches.
- 2. Lack of skill to work across different machines.
- 3. Capability for stitching the entire garment is missing

SKILL GAP ANALYSIS IN GARMENT INDUSTRY IS CARRIED OUT IN THE FOLLOWING FOUR STEPS

1. DEVELOP THE JOB PROFILES AND IDENTIFY THE CRITICAL SKILLS NEEDED FOR THE JOB ROLE

Review the job profiles by considering the descriptions of current position and future needs.

The impact of upcoming regulatory and statutory changes on the work related aspects are to be considered.

Develop a list of clear and accurate skills that are needed to perform the given job and the suitable competencies that are to be acquired.

2. CURRENT SKILLS LEVEL INVENTORY OF THE EMPLOYEES IS TO BE CONDUCTED

Descriptions of positions

Specifications about Job class

Employee assessments and performance evaluations

Conduct interviews/meetings with focused group managers, supervisors and employees

3. THE EMPLOYEES' COMPETENCIES AND SKILL LEVELS ARE TO BE IDENTIFIED

Gather information by competency assessment and create one searchable database for it.

The database for all employees with their prevailing competencies is to be prepared.

Crosscheck the identified essential critical skills for the present and future purpose.

4. SKILLS INVENTORIES DATABASES OF THE ORGANIZATION ARE TO BE CREATED

The database is useful to the organization in the following manner.

The database will be useful in searching the qualified employee who is already working in the concerned organization and possessing the required skills for completing certain projects or jobs.

Identify the gaps where employees are not having necessary skills.

Training plans can be developed after identifying training needs.

It provides a basis for discussion with individuals for career development.

Summary of skill set level was prepared after carrying out the above analysis.

TO IDENTIFY THE PRESENT SKILL OF EMPLOYEES ONE CAN USE THE FOLLOWING MODAL FORMAT

TABLE 1 Skill Level Entering Page 0 No Skill Training / Can do with the support of Trainer Team Can do with Quality but Take more than standard time Date 27-Apr-15 within standard time Last Updat 27-Apr-15 Can teach others SNLS SNLS £5 2¥ **₩** SNS z E 370 В **Band Knife** attach x at cuff Prefix at waist cuff Sagout fror **Employ ID** Name Bundling hem Laying gusset Box Prefix je G 듯 Bo₩ 718 SATYAVAT 921 RAMANAM 1008 LATHA PA 1898 LAKSHMI E LAKSHMI A

Depending on the skill level identified, the employees are made into groups. Then the training programme is designed suitable to each group of employees.

Most of the Garment manufacturing units are preparing daily summary of gaps report. This report is prepared to know the assembly line wise, designation wise, shortage of number of employees as per the model format mentioned below.

TABLE 2

	REQUIRED			ALLOCATED			GAP		
	TAILOR	HELPER	TOTAL	TAILOR	HELPER	TOTAL	TAILOR	HELPER	TOTAL
LINE 1	58	5	63	51	6	57	-7	1	-6
LINE 2	65	6	71	54	6	60	-11	0	-11
LINE 3	41	8	49	53	6	59	12	-2	10
LINE 4	41	8	49	51	6	57	10	-2	8
LINE 5	65	6	71	51	6	57	-14	0	-14
TOTAL	270	33	303	260	30	290	-10	-3	-13

AREAS IDENTIFIED FOR SKILL DEVELOPMENT

To overcome the identified gaps in the required human resources at skill level, the following trades/courses in Garment Making sector are being proposed for training. The training programmes may be conducted by the external agencies or company by its own trainers.

- 1. Industrial Sewing Machine Operator
- 2. Tailor (Basic Sewing Operator)
- 3. Surface Ornamentation Technique
- 4. Garment construction techniques
- 5. Trouser and Pajama Making
- 6. Apparel CAD/CAM
- 7. Apparel Pattern Making & CAD
- 8. Drafting & Cutting.

METHODOLOGY OF TRAINING

Teaching and assessments are connected; trainee learning is continuously measured during training instruction. The following methodologies are being actively implemented with proven effectiveness in skill trainings.

- 1. Theory,
- 2. Practical
- 3. Demo
- 4. Industrial Visits
- 5. Guest Lectures by experience and industry specialists.
- 6. On Job Trainings
- 7. Assessments (Viva & Practical)
- 8. Certification

More than 70% of trainees in Garment manufacturing units is women. Hence organizations need to address some issues related women during their skill growth training and in their regular jobs.

Following are some of the influential issues and the ways to overcome;

- 1. Natural hormone cycles that could make them skip trainings for consecutive days are common phenomena in rural training centers. It could be overcome with the help of local health inspectors and Anganwadi workers by conducting health campaigns on personal hygiene.
- 2. School drop outs as a result of cultural, social and financial deprivation may need more counseling to get enrolled into such trainings and ensure completion of training.
- 3. Married women need counseling on the part of being financially independent and also making them aware of advantages that gives them a chance to increase their family income.
- 4. Women who has to take care of their children (0-5 yrs), can be addressed by establishing cost effective child care facilities at the training center.
- 5. Women whether married or unmarried often reject to join trainings due to longer distance travelling. Such can be addressed by establishing training centers within potential areas nearby residential areas.
- 6. Sometimes tribal areas near to potential industrial opportunities can be addressed by residential mode of trainings.
- 7. Snacks/Lunch and day to day travel allowance can motivate attendance of the poor.
- 8. Employing successful women as instructors from the textile background has immense effect in reducing dropouts and increased sustainability.
- 9. Post training completion or post placements, regular feedbacks from the trainees as well as employers helps in longer sustainability
- 10. Provision of comfortable and secured environment within as well as surroundings of training centers.
- 11. Considering personal hygiene provision of well-equipped refreshment rooms is a must.
- 12. Training timings should be scheduled be in sync with local as well as need based.
- 13. It is always encouraging to conduct two parent/guardian counseling sessions regularly, which could morally boost the trainees and their guardians and also the instructors for successful trainings.
- 14. Women need to be encouraged to take part in all social activities encouraged by various government programs.
- 15. Various cultural and social customs need to be respected by the trainers during training period.

FINDINGS

Garment /Apparel industry requires specialized job roles for cutting, stitching, washing, packing etc for apparel making.

Mapping of the occupations based on the activities performed and skill level required in the production process is to be carried out in order to find out skill gap. Some of the Operators are lacking of proper knowledge of sewing machine operations, and different types of seams and stitches.

Some of the Operators are unable to work across different machines.

Most of the Garment manufacturers are preparing summary of skill set level format for identifying the present skill of their employees.

Most of the Garment manufacturing units are preparing daily summary of gaps report for identifying the category wise absenteeism and adjusting the work load. The areas identified for skill development are Industrial Sewing Machine Operator, Tailor, Garment construction techniques, Apparel CAD/CAM, Apparel Pattern Making & CAD, Drafting& Cutting.

The skill training methodologies normally followed in the industry are conducting theory classes and Practical's, arranging Demos &Industrial Visits, Guest Lectures by experience and industry specialists and finally by conducting exams.

Around 70% of the workforce is women; hence the organization should address their issues to reduce the absenteeism and to increase the effectiveness in training.

CONCLUSION

The Garment manufacturing sector is one of the important sectors in MSME in employment generation to women and skill development requirement. The organizations can analyse the skill gaps in four stages. This systematic analysis will help the manufacturers to identify the areas for skill development and to design their programmes effectively. Majority of trainees are women; hence the organizations are requested to address the issues related to them.

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