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Case Research

## Strategies for skills development to upsurge Lesotho's participation in the textile global value chains

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**Abstract:** *The textile industry plays an essential role towards economic development in the African continent, however, countries such as Lesotho are narrowly participating in the regional textile value chains due to skills gap challenges. The aim of this paper is to identify strategies adopted by four textile leading countries to upscale skills needed in manufacturing enhancement for the industry. Using the literature review approach, this study explores the skills development mechanisms that India, Vietnam, China, and Bangladesh are applying to improve their competitive stand within the global textile industry. The findings of this research indicate that strategies inclusive of public-private collaborations, funding training programmes, engagement of the private sector in training, international partnerships, higher educational institutions collaborations with the textile industry are among other mechanisms that have assisted the four benchmarking countries to integrate more in global textile value chains. The research also provides short-term and medium-term recommendations that decision and policy makers in Lesotho and other African*

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*countries can adopt to improve the textile workforce skills so as to take advantage of opportunities in the textile industry regionally and globally.*

**Keywords:** *textile industry, Lesotho, strategies, policies, skills development*

## **Strategije za razvoj veština za povećanje učešća Lesota u tekstilnim globalnim lancima vrednosti**

**Apstrakt:** *Tekstilna industrija igra suštinsku ulogu u ekonomskom razvoju na afričkom kontinentu, međutim, zemlje kao što je Lesoto nedovoljno učestvuju u regionalnim tekstilnim lancima vrednosti zbog izazova nedostatka veština. Cilj ovog rada je da identifikuje strategije koje su usvojile četiri vodeće zemlje u oblasti tekstila za unapređenje veština potrebnih za unapređenje proizvodnje za industriju. Koristeći pristup pregleda literature, ova studija istražuje mehanizme razvoja veština koje Indija, Vijetnam, Kina i Bangladeš primenjuju kako bi poboljšali svoj konkurentski položaj u globalnoj tekstilnoj industriji. Nalazi ovog istraživanja ukazuju da su strategije koje uključuju: javno-privatnu saradnju, finansiranje programa obuke, angažovanje privatnog sektora u obuci, međunarodna partnerstva, saradnju visokoškolskih institucija sa tekstilnom industrijom među glavnim mehanizmima koji su pomogli zemljama za koje je sproveden benchmarking da se više integrišu u globalne tekstilne lance vrednosti. Istraživanje takođe pruža kratkoročne i srednjoročne preporuke koje donosioci odluka i politike u Lesotu i drugim afričkim zemljama mogu usvojiti kako bi poboljšali veštine tekstilne radne snage i bolje iskoristili mogućnosti u tekstilnoj industriji na regionalnom i globalnom nivou.*

**Ključne reči:** *tekstilna industrija, Lesoto, strategije, politike, razvoj veština*

### **1. Introduction**

A lot has been studied about the textile and apparel industry in Lesotho especially in relation to gender problems, HIV/AIDS issues, economic and political impact of the sector, issues pertaining to continuity of the industry, foreign direct investment issues, competitive advantages and performance of the sector, and environmental sustainability matters among others (Jeppesen & Bezuidenhout, 2019; Ayoki, 2016; Talasi, 2021; Mabathoana, Van Wyk & Adefuye, 2019; Tange, Bello, Makatjane & Tsikoane, 2017; Morris & Staritz, 2017; Von Broembsen & Godfrey, 2016). Yet, among these dimensions, no study has looked into the issues of human resource development mechanisms that can be adopted to ensure sustainable continuity of the Lesotho textile industry. Human resource development is described as a process for improving people's expertise through organizational development and employee training and development with the intention of improved organizational performance

(Swanson, 2022). Further, industrial human resource development can be acquired through strategies inclusive of investment in the education sector, enhanced interactions between the industry and its stakeholders, engaging international professionals and making sectorial human resource development a national priority (Rasethunsa, 2022).

Through a benchmarking approach, the purpose of this research is to identify strategies that Lesotho can adopt to improve skills to promote Lesotho's participation in the textile regional and global value chains. Four leading countries in textile export globally would play a key informant role in this study. Table 1 below shall present these four countries and their total value of textile exports.

*Table 1. Leading exporters of textile in 2021*

Country	Total amount in US\$B	Country	Total amount in US\$B
China	286	Vietnam	43.7
Bangladesh	46.2	India	41.4

*Adopted from: Observatory of Economic Complexity (2022)*

The outcome of this study shall be of benefit both the government of Lesotho, investors in the textile industry, the general public, the textile industry stakeholders, and academia. For the government of Lesotho, the outcome of the study shall shed light on the mechanisms and policies that can be adopted by the Lesotho government as noted from the governments in the four benchmarking countries to ensure a developed workforce in this regard. For the textile investors, this research would assist in providing strategies that are applied by the textile industry investors in the four benchmarking countries that the Lesotho investors can implement to ensure skills development to enhance the performance of the industry. Again, the outcome of this study would be of great significance to both the private sector and the general textile industry stakeholders, as the roles of these groups in developing the textile industry human resource in the four benchmarking countries shall also be explored. For academia, the outcome of this study shall generate new knowledge in relation to strategies that can be adopted to enhance the Lesotho textile industry human resource, which can further be explored by future research for the benefit of this sector.

The study would further develop short- and medium-term recommendations for the government of Lesotho, textile industry investors, the Lesotho private sector, and the textile industry general stakeholders to consider when developing future plans.

## 2. The textile industry in Lesotho

The textile and garments sector managed to make significant progress since the early 1970s, and recently, the sector has positioned itself among the rapidly growing sectors globally (Mercin, 2021). In Africa, the textile industry is at a developing phase with a value chain that includes growing cotton fabric, weaving and apparel manufacturing (Southern African Custom Union, 2022). Lesotho has also witnessed a rapid growth of this sector as it grew from just having a handful factories in the early nineties to becoming the country's main manufacturing powerhouse (Marie-Nelly & Baskaran, 2021). The Lesotho textile, apparel and footwear manufacturing industry in recent years has emerged into the main formal private sector employer in the country. The contribution of the industry to Lesotho's economy is enormous as this industry touches various economic sectors such as small packaging industry, road freight transporters, courier services, clearing agents, security, passenger transport, traders that sell food to workers, residential accommodation, water, electrical and telecommunication utilities (Tralac, 2017).

Textile exports have grown rapidly after the introduction of the African Growth and Opportunity Act (AGOA), which has given the country preferential access to the U.S. market. However, exports to South Africa have increased drastically and have more than tripled since 2010 and helped mitigate the declining in exports to the United States and the European Union (The World Bank, 2018). However, a negative impact of COVID-19 pandemic immensely affected the Lesotho textile and apparel sector causing Lesotho to face a tough fiscal outlook as the South African Customs Union (SACU) transfers, private investments and exports are lessening (Marie-Nelly & Baskaran, 2021).

SACU is a net importer of textiles products, with a total trade deficit of over US\$545 million in 2020. Its textiles intra-regional trade remains highly imbalanced, with South Africa dominating and running a large trade surplus with other member states imports. Intra-regional trade has grown rapidly as exports shifted from external markets (mainly the United States of America) to South Africa. SACU intra-trade (exports) in clothing products is dominated by South Africa and to some extent Eswatini and Lesotho. Lesotho and Eswatini's clothing exports to South Africa are expanding at an accelerating rate and catching up with the United States AGOA based exports. South Africa is a key player with regards to textiles trade in the SACU region and its exports almost all of the SACU textiles, with other member states only accountable for only less than 5% of the region's total textiles exports (Southern African Customs Union, 2022).

To take advantage of the regional and international apparel market opportunities, it is imperative for Lesotho to upscale its competitive stand in the apparel industry especially within the SACU region through implementing value adding initiatives. The AGOA is set to expire in 2025, therefore, Lesotho should take immediate actions to improve in a wide range of skills necessary to compete in regional and global markets (Marie-Nelly & Baskaran, 2021). According to the International Labour Organization (2022), the future of work in the textiles and garments sector is changing intensely and quickly due to technological advances, climate change, demographic shifts, globalization, geopolitics, and other drivers. Investing in the quality of textile and garment workforce is an essential element for firms to enable high productivity, quality, and access to fourth industrial revolution (Anh, Tuan & Tung, 2022).

Strengthening the competitiveness of Lesotho's traditional industries, such as apparel, as well as developing new, export-oriented sectors has long been a government priority (Marie-Nelly & Baskaran, 2021). Unfortunately, there has been a major concern that most international investors within the Lesotho textile and apparel industry fail to transfer critical skills to Lesotho national during the manufacturing process (Tralec, 2016). The National Clothing and Textile Allied Workers Union has on several platforms urged the Lesotho government to promote skills transfer to local nationals working in the clothing and textile industry. This is to ascertain that Lesotho nationals are equipped with relevant skills from the international factory owners (Phulane, 2023).

Further, lack of skills in textile operations has been identified as an impediment towards the sector's growth and development, disallowing Lesotho to participate more in the textile value chain (Marie-Nelly & Baskaran, 2021). Again, as much as the textile industry plays a strategic economic role in the SACU region (comprising of Botswana, Lesotho, South Africa, and Eswatini), in the global context, the industry does not participate much in the global textile value chain as it only accounts to less than 1% of the global production in textiles and clothing (Southern African Customs Union, 2022).

### **3. Methodology**

This research applied literature review approach as a data collection method. This study collected secondary information relating to strategies applied to improve the textile industry skills and build cases to the four benchmarking countries namely, India, Vietnam, China, and Bangladesh. To ensure trustworthiness, data was collected through multiple sources including government websites and reports, international organization reports, magazines, newspapers, non-governmental organizations websites, business sector websites, books, and journal articles among others. Collected

information was analyzed in a table form for comparison to identify similarities and differences of strategies applied by the four countries.

#### **4. Lessons drawn from the benchmarking countries**

This section shall present the some of the strategies implemented by the four benchmarking countries namely, India, Vietnam, China, and Bangladesh. A comparative analysis of strategies would then follow.

##### **4.1 Case of India**

The Indian government recognizes that skill building as an instrument to improve the effectiveness and contribution of labor to the overall textile production (Textile Value Chain, 2015). In a mission to improve the performance of the sector, the Indian government developed a vision, strategy and action plan for Indian textile and apparel sector 2024-25. Therein, the Indian government established that productive and skilled manpower is the only option to attain global competitiveness and to achieve this, the government planned to heavily invest in improving the workforce skills, by establishing strong partnerships between the government and the private sector (Ministry of Textiles, 2023a). In 2013, the government of India established the Textile Sector Skills Council to develop a skilled workforce for the textile industry through setting curriculum for training and accreditation of trade competency. The organization represented by the industry, government and academia to develop innovative skill solutions and to invest in skills and job creation. The key objective of the council is to define the skill requirement of the industry and to create a deployable talent pool of workforce for the textile industry. The council is incubated by textile industry associations and training providers including textile research associations (Textile Sector Skills Council, 2023).

In a mission to diversify and find ways to enhance value, the Indian textile sector partnered with academic institutions to ensure that there is a perfect fit between the courses offered and the needs of the industry especially in industrial design and textile fashion design areas (Ramkumar, 2019). Further, the Ministry of Textiles is implementing demand driven and placement-oriented skilling programme under the Samarth- Scheme for Capacity Building in Textile Sector for the entire value chain of the sector. These capacity enhancement programmes are implemented in collaboration with the government agencies, sectorial organizations, and the textile industry associations (Ministry of Textiles, 2023b). To ensure that the right supply of skills to the textile sector, the University of Applied through the department of fashion design is focusing on institute-industry interaction with skill development activities such as a 45-

day program on sewing for training workforce with less formal education, such as workers with just a 5<sup>th</sup> grade education (Ramkumar, 2019).

## **4.2 Case of Vietnam**

In 2008, the Vietnamese government established a masterplan for the country's textile skills development by 2015 with a vision to 2020. In 2014, the masterplan was reviewed and a 2020 plan was developed with a vision to 2030. Once more, in 2018 the plan was revised to suit the country's vision of 2045. Among various issues, the plan also focused on investing in textile labour development mainly looking at training programs for managers and technicians to ensure a skilled force (Ministry of Trade and Industry, 2014). The Vietnamese government partnered with Global Skills Ledger through the engagement of Proskills Global Limited, the Foreign and Commonwealth Office of the UK Embassy in Hanoi, the Vietnamese Ministry of Labour, Invalids, and Social Affairs, British Council and other stakeholders to conduct a comprehensive study of employer skills and education needs within the garments and textile sector (Global Skills Ledger, 2023).

To improve innovation within the textile industry, the Vietnam National Textile and Garment Group established a partnership with the Swiss spinning system leader Rieter in 2023. The collaborative partnership intends to upscale textile education in Vietnam by providing yearly training programmes conducted by Rieter experts for professors, offer training opportunities for students in Vietnamese spinning mills, host guest lecturers and providing a machine model to support education. Furthermore, Reiter intends to support students with scholarships to expand their knowledge in the field (Reiter, 2023). To build skills in support of the textile industry, the government established the Hanoi Industrial Textile Garment University in 2015 which offers a range of qualifications from undergraduate to postgraduate courses (UniRank, 2023).

## **4.3 Case of China**

To strengthen knowledge to run the textile industry, the International Labour Organization held a workshop to build the capacity of the Chinese government and industrial players on green development and responsible transformation of the sustainable fashion industry. This workshop assisted in the analysis of specific opportunities for social dialogue and enhanced action by government, firms, workers and communities for a green transition (International Labour Organization, 2022). One of the strategies that China engage to ensure a skilled textile workforce is through establishing introduction of textile programmes in universities such as the Donghua University College of Textiles whose alumina consists of talented leaders in the Chinese textile industry (Donghua University,

2023). Again, in 2018, 27 Chinese universities established a new Higher Education Alliance with the intention of extending areas of collaboration of research knowledge and experience, and to clarify the role to play in the knowledge development of the textile industry (Textile Focus, 2018).

#### **4.4 Case of Bangladesh**

Realizing the high amount geared towards hiring foreign experts, Bangladesh established the Factory Skills Development Training programme to upscale skills of factory professionals and students to support the development of the textile industry. The programme also works towards improving the textile industry partnerships with academia and business experts by designing dynamic course outlines (Textiles Today, 2023). Further, in support of the textile industry skills development initiatives, institutions such as the Bangladesh Garment Management Training Institute have been established by the private sector. For example, the primary aim of this institution is to provide the Bangladesh's textile industry with a workforce that is well-versed in state-of-the-art concepts and techniques to support continues growth of the sector (Bangladesh Garment Management Training Institute, 2023).

Recent initiatives to build skills capacity for the textile industry in Bangladesh includes funding (loan) approved by the Asian Development Bank to strengthen the skills base and training programmes. The programme further is intended to build the institutional capacity of training institutions to provide innovative skills training with technology applications (Fibre2Fashion, 2023). The private sector has also engaged in providing short-term courses to enhance the textile skills development offering courses such as industrial engineering, quality management, the art of knit garments consumption and costing, apparel merchandising, production planning in garments industry, and supply chain management among others (Elearning, 2023). Again, in collaboration with the International Labour Organization, between 2014 and 2017, Bangladesh implemented an industry-based training targeted for instructors, industry trainers, and assessors. This programme also included briefings for managers and executives of enterprises (International Labour Organization, 2014).

Table 2 shall present a comparative analysis of strategies implemented by India, Vietnam, China and Bangladesh.



Table 2. Comparative analysis of strategies implemented by the four benchmarking countries

Strategies implemented	India	Vietnam	China	Bangladesh
Development of long-term strategic plans by government	X	X		
Formation of government, business sector partnerships and sectorial associations	X	X	X	X
Establishment of government entities under the Ministry to focus on skills development	X			X
Establishment of partnerships between academic institutes and the textile industry	X	X	X	X
Host international guest lecturers		X		
Government facilitation of training for instructors through international partners		X		X
Ministry running training programmes	X			
Development of partnerships with international training and research institutions	X			
Partnerships with local embassies and international bodies	X	X	X	X
Local textile companies partnering with leading international textiles companies		X		
Establishment of textile focused universities		X	X	
Running of projects/workshops in collaborating with the ILO		X		X
Universities forming alliances to strengthen textile skills			X	
Private sector-based training programmes				X
Government securing loans to finance training				X

Source: Researcher's own compilation

From the experiences of the four benchmarking countries, it can be drawn that the approaches applied by these four countries are highly similar. Firstly, it can be noted that these countries have invested in establishing formal and informal training institutions offering both long-term and short-term training programmes directed towards improvement of skills to support the growth and development of the textile industry. It is also evident that the government plays a major role in establishing international partnerships geared towards the skills improvement initiatives of the textile industry. It can also be established those strategic partnerships between education institutions and the industry plays a crucial role towards ensuring a match between the skills needed by the industry and the courses offered by educational institutions. Further, it can be identified that some governments established public agencies and grant them autonomy to run training programmes.

It is also important to note that private training institutions can lend a hand in offering courses for the advancement of the textile industry. Further, engaging and seeking the support of local embassies can be a weapon that countries can utilize in the capacity development initiatives in this regard. Establishment of universities mainly focusing on serving the textile industry seem to be a common strategy used by textile leading countries. Alliances between universities offering textile courses also appears to be a mechanism geared towards ensuring quality of textile workforce. Lastly, it can also be noted that some governments secure funding externally (loans) to fund training programmes in order to ensure a skilled textile manpower.

## **5. Recommendations for Lesotho**

After this analysis, it is therefore recommended that Lesotho can apply the following short- and medium-term strategies to improve its participation in the textile value chain:

### **5.1 Short-term strategies**

- Government through the Ministry of Trade, Industry, Business Development and Tourism and the Ministry of Education and Training to develop a textile industry skill development five-year master plan. This shall enable the provision of a conceptual layout guiding the future growth and development of the textile industry current and future workforce.
- The Ministry of Trade, Industry, Business Development and Tourism to form a two-year term committee to lay a foundation for strategic partnerships between business sector, government, and the textile industry focusing on skills development. Setting up collaborations shall provide a platform for effective communication between the textile industry and its stakeholders to establish their roles and responsibilities in textile industry skill development.
- All higher education institutions offering textile courses to form an alliance with the textile industry to ensure that the right skills are offered. This shall ensure that the correct curriculum is in place to avoid a mismatch of skills. This shall also provide a platform for the textile industry to assist in communicating the latest trends in the industry.
- The Ministry of Trade, Industry, Business Development and Tourism to encourage private training institutions to participate offering short-term courses needed in the textile industry. This would enable local nationals without high school education to participate and offer their skills to the textile industry.

- The Ministry of Education and Training to persuade higher education leaders to develop training plans for textile lecturers to further their qualifications and facilitate their sponsorship with the National Manpower Development Secretariat.
- Institutions of higher learning to engage in comprehensive research focusing on the textile industry to identify skills gap challenges and to develop meaningful and speedy solutions. This would ascertain that the industry has the right set of skills at the right time to support a steady functioning of the textile sector.
- Through the Ministry of Education and Training, international guest lecturers from advanced textile industry to be invited with the aim of elevating skills for local textile instructors.

## **5.2 Medium-term strategies**

- Government through the Ministry of Ministry of Trade, Industry, Business Development and Tourism to establish a Council focusing on textile industry skill development programmes. The Council could also focus on sourcing funds and collaborating with local and international training institutions to capacitate the textile workforce.
- Government through the Ministry of Ministry of Trade, Industry, Business Development and Tourism and Education and Training to conduct continues research to establish skills shortages within the textile industry. This shall ensure that that the country is well informed about the directions to take when drawing skills development plans and assist in ensuring that adequate financial resources are allocated in this regard.
- The government through the Ministry of Education and Training to seek international assistance to run skills capacity programmes for the textile industry. This would ensure that advance skills are acquired.
- Local textile companies to be encouraged to establish partnerships with international textile organisations. This would allow local organisations to absorb skills, knowledge and capabilities from their international counterparts.
- The government through the Lesotho National Development Cooperation and the Ministry of Trade, Industry, Business Development and Tourism to develop and enforce skills transfer policy. This would ensure that all necessary critical skills from the international investors are transferred to local nationals as the acquired skills would ascertain the sustainability and continuity of the textile production.
- Government through the Ministry of Education to facilitate financing the machinery for public institutions of higher learning to ensure that textile students are well resourced and equipped with relevant skills.

- Through the Ministry of Education and Training, government to establish a formal institution mainly focusing on textile studies to extend the expansion of textile skills in the country.

This research attained its objective of identifying textile skills development strategies implemented by India, Vietnam, China and Bangladesh. The research further provided recommendations for decision and policy makers in Lesotho and other African economies to consider in support of skills development initiatives for the advancement of the local textile industry. However, it is acknowledged that since the study adopted a literature review approach, some critical information relating to the mechanisms applied by the four benchmarking countries could have been omitted since not all information pertaining developmental initiatives are publicized. Also, it is acknowledged that other information that could have enriched this study could have been inaccessible at the time the study was conducted. All these limitations could have prohibited the researcher to draw well informed conclusions for the topic under investigation. Future research could explore the textile skills development strategies utilised by European countries. A study in this area could add more on strategies that countries could adopt to participate more in regional or global textile value chains.

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