

# Sectoral Human Capital Study

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## Fashion and innovative textiles sector

Research results  
– 1st edition

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## About the project

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### Project name:

- » Sectoral Human Capital Study
- » Fashion and innovative textiles sector



### Study objective:

- » To increase the knowledge about the current and future demand for skills in the fashion and innovative textiles sector



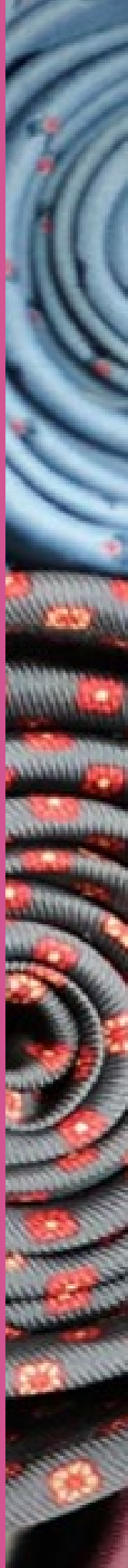
### Respondents:

- » Sector experts
- » Employers and employees representing the sector (sole proprietorships were not covered by the survey)
- » Representatives of educational institutions, recruiters, and labor market analysts



### Research dates:

October 14, 2020 – November 10, 2021  
including quantitative research:  
August 7 – August 27, 2021





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## Research methodology

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### Qualitative research:

Individual and group interviews with experts

- » 40 individual interviews
- » 4 expert panels
- » Delphi study (54 respondents)
- » Summary panel with the Sectoral Competence Council of Fashion and Innovative Textiles Sector

### Quantitative research\*:

- » Employers: 800 interviews (CAPI: 479, CATI: 321)
- » Employees: 865 interviews (CAPI: 510, CATI: 355)

\* Quantitative interviews were carried out using the methods of CAPI (standardized face-to-face interviews using a laptop) and CATI (an additional method using remote contact channels: telephone interviews, interviews using an Internet communicator)

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## About the sector

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### Definition:

- » Section C.13 – Manufacture of textiles
- » Section C.14 – Manufacturing of wearing apparel

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### Number of employers in the sector\*:

- » 21,838 entities (according to 2018 data)

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### Employment\*:

- » Textile industry: 70,000
- » Clothing industry: 120,000

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### Labor demand\*:

By 2030, an additional 30,000 employees will be needed in the fashion and textile sector

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### Labor supply\*:

Approximately 3,000 people are currently studying in schools related to the sector (2020 data)

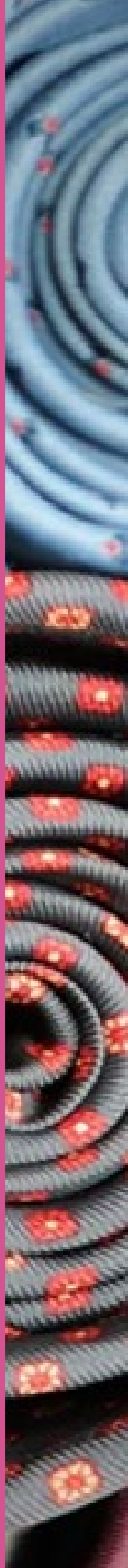
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### Potential\*:

The fashion and textile sector is among EU's most innovative sectors. Poland ranks second in terms of the number of production plants and third in terms of employment in the sector

\* The quoted data come from the reports:

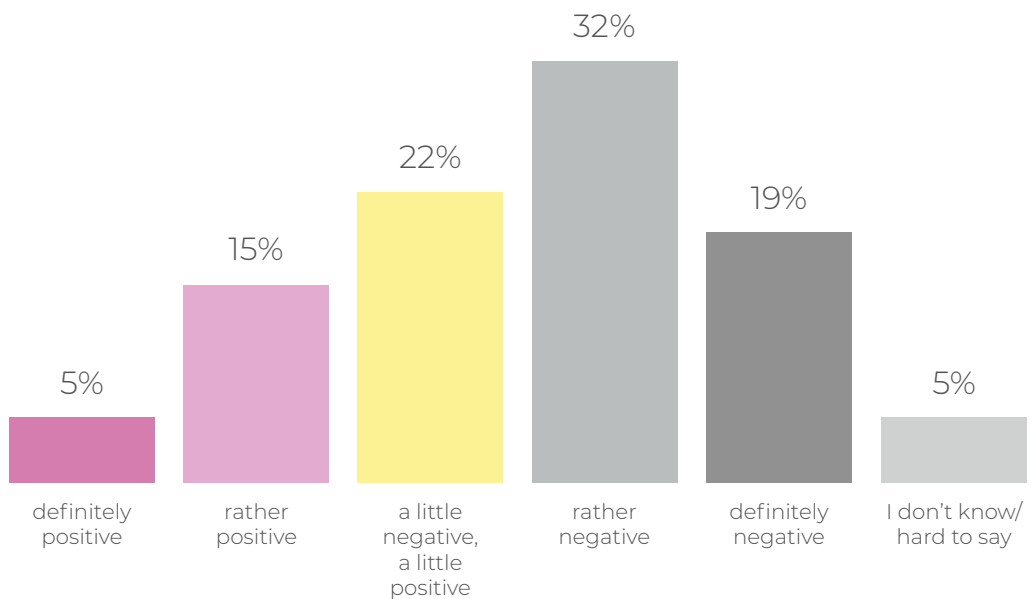
- Słaby W. (2020) Situation on the labor market in the textile, clothing, and leather sector - spring „Przegląd Włókienniczy”
- 2019 Statistical Yearbook of the Sector, Central Statistical Office 2020



## Covid-19 impact on the sector

The negative impact of the pandemic manifested itself as the lack of orders, problems with acquiring materials due to broken international supply chains, the need to adapt the procedures to the restrictions related to ensuring employees safety, and the need to introduce changes in production.

Chart 1. Impact of the pandemic on companies' operations



Source: BBKL fashion and innovative textiles - 1st edition 2021, employers (n = 800)

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# Key business processes and key positions

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## Creative processes (designing)

- » Clothing designer
- » Clothing constructor
- » Clothing technologist
- » Innovative materials specialist
- » Trend researcher

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## Customer relations management

- » Social media specialist
- » CSR specialist

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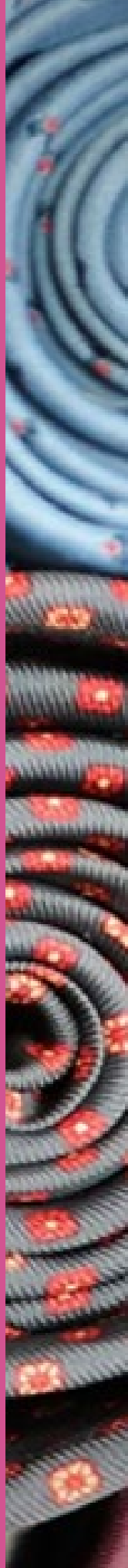
## Clothing production (sewing)

- » Fabric cutter
- » Seamster
- » Tailor
- » Clothing production manager

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## Product management

- » Marketing specialist





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## Balance of competences (skills) – methodology

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Skills' mismatch: the difference between employers' assessment of the importance of skills in a given position and employees' self-assessment of their skills. This enables identification of:

- » **surplus skills** – assessed as relatively less important by employers while scoring relatively high in employees' self-assessment
- » **balanced skills** – assessed as relatively more important by employers and scoring relatively high in employees' self-assessment
- » **sufficient skills** – assessed as relatively less important by employers and scoring relatively low in employees' self-assessment
- » **scarce skills** – assessed as relatively more important by employers while scoring relatively low in employees' self-assessment

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Competence gap: identified when certain skills are relatively more important for employers while being difficult to obtain in employers' opinion (at least 51%)

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Skills whose importance will grow in the future: assessed based on employers' responses to the question regarding changes in the significance of skills over the next 3 years

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## Balance of competences (skills) – main conclusions

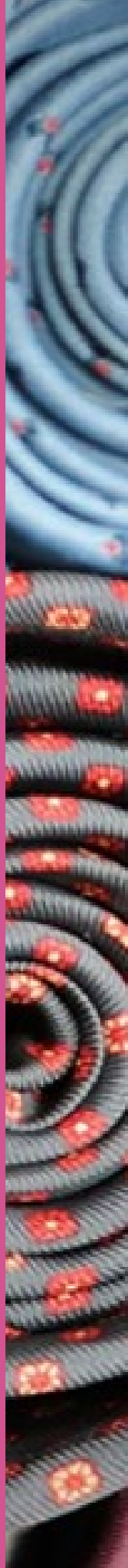
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- » Based on the analysis of the balance of skills for all the positions, most (9 in 12) of the sector's key positions have the skills necessary for their particular tasks (balanced skills)

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- » Skills that are relatively more important from the perspective of employers also score high in employees' self-assessment

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- » Skills relatively more important from the perspective of tasks are assessed lower for the following positions: clothing constructor, tailor, and CSR specialist

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- » Competence gap has been identified for the following positions: clothing constructor, clothing technologist, trend researcher, marketing specialist, social media specialist, and CSR specialist







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## Future skills

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### Skills whose importance will grow in the future\*:

- » Knowledge of tools and methods for achieving the company's ecological goals (43%) – scarce skill for the CSR specialist

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- » Knowledge of the character of a given company and its products (35%) – balanced skill for the marketing specialist

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- » Knowledge of issues related to data analysis, statistics, management, and economics (33%) – balanced skill for the trend researcher

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- » Knowledge of tools and services (e.g., Google Analytics) that enable data analysis (25%) – scarce skill for the trend researcher

\* Percentages for the answer „the importance of the skills will increase in the future”

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## Assessment of employees' skills

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**66%** of the surveyed companies assess what skills their employees lack

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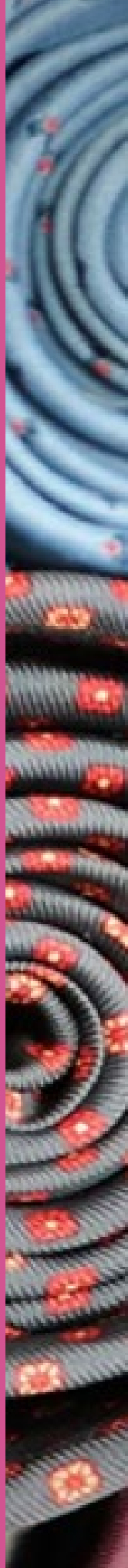
**67%** of the companies that assess employees' skills use interviews with the superior/ superiors as the assessment tool

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**76%** of employers declare that their employees' skills are fully satisfactory, and do not see the need for employees' skills' improvement

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**60%** of employers train current employees if the company lacks skills





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## Improving employee skills

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Methods of employee skills development that employers intend to use in the next 3 years:

- » 41% – instruction on e.g., operation of new equipment
- » 31% – direct observation of another employee's work

**75%** of employers believe that the skills of graduates entering the labor market are sufficient

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**42%** of employers indicate that development of soft skills is an important element of preparation for working in the sector

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**76%** of employers declare that they use at least one method to develop their employees' skills

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**24%** of employers did not use any method to develop their employees' skills

## Demand for employees

**20%** of employers were looking for new employees in the last twelve months\*.

**51%** of the employers who were looking for new employees had difficulty finding them

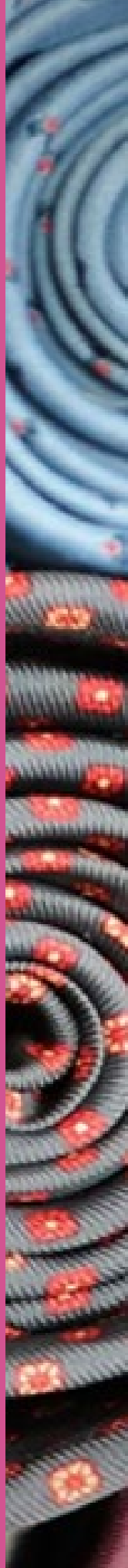
The most frequently mentioned problem with finding new employees was low interest in the jobs offered by the company

Secondary-level technical education in a field related to the sector is sufficient when looking for employment on 10 of the 12 key positions in the sector

Key positions where the demand for employees will increase in the next 3 years:

- » Seamster – **14%**
- » Tailor – **13%**

\* August 2020 – August 2021





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## Assessment of working conditions in the sector

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**90%** of the surveyed key-position employees are satisfied with their work

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**94%** of the surveyed employees agree with the statements that their work makes sense and that they do what they like at work

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**68%** of the surveyed employees believe that the number of their tasks is overwhelming

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**77%** of the surveyed employees declare that they have a direct supervisor/supervisors to supervise their work

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**95%** of key-position employees declared that they were not looking for another job

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## Social and environmental challenges

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**53%** employers agree that the social challenge most important for the sector's future is to adapt production to the ecological standards required by the law (introduction of circular economy), and to customer preferences

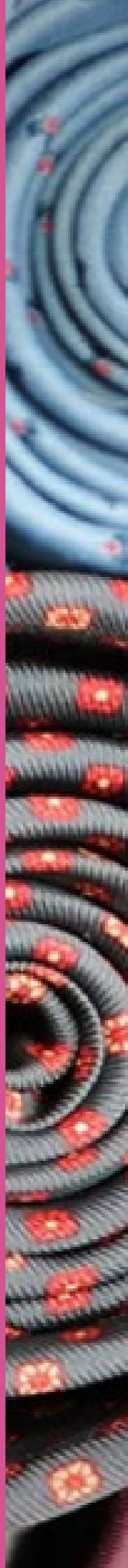
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**43%** of employers believe that integrating fair trade considerations into production processes will be a challenge

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**37%** of employers believe that reorienting production towards more expensive clothes of much higher quality will be a challenge

The percentages of „very important challenge” and „significant challenge” answers were totaled





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## Economic challenges

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**40%** of employers agree that, in the future, it will be a challenge to hire new employees with online sales, e-commerce, and other similar skills.

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**36%** indicated that it is a challenge to find new employees for the sector, especially production. That is due to the lack of relevant candidates on the labor market

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**33%** of employers believe that it is a challenge to find new hires with skills related to sustainable development and ecological production

The percentages of „very important challenge” and „significant challenge” answers were totaled

## Technological and legal challenges

### Technological challenges:

**35%** of employers considered the introduction and development of digital solutions to remotely measure and personalize clothes before production as a challenge

**33%** pointed out that, in a situation of shortened supply chains, finding local materials suppliers is a challenge

### Legal challenges:

**30%** of employers consider it a challenge to introduce solutions enabling quick identification of products manufactured in Poland, which would make it easier for customers to choose Polish products

The percentages of „very important challenge” and „significant challenge” answers were totaled

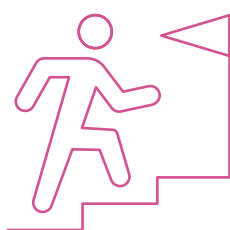




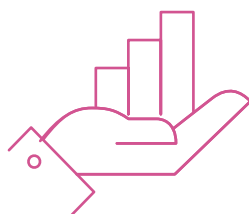
## Sector development scenarios



The scenarios were prepared based on the identified challenges and processes observed in the sector and its environment



The challenges are a set of factors that will largely affect the changes in the future



The scenarios include three variants:

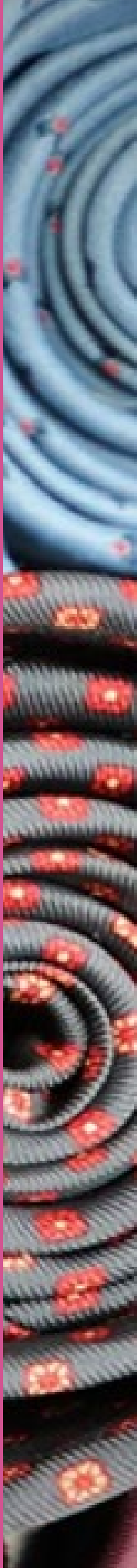
- » growth (positive scenario)
- » stabilization (neutral scenario)
- » sector recession (negative scenario)

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## Positive scenario

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- » The sector will take into account the changing needs of consumers, characterized by growing requirements regarding the ecological aspect of the sector's functioning and respecting employees' rights in Poland
- » Consumption styles will change, and interest in high-quality, durable products will increase
- » Enterprises will have to devise ways of attracting new employees. Hiring people at the start of their professional careers will be key
- » By expanding the range of services using modern technologies, the sector will become an area of employment of specialists with IT skills
- » Long-term, this process will lead to development of industry schools and technical schools, as well as university faculties educating people to meet the sector's demand for employees
- » This scenario will increase demand for specialists to work in all the key positions analyzed





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## Neutral scenario

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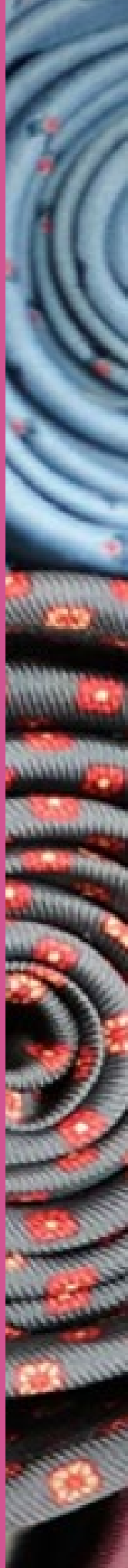
- » The intermediate scenario assumes that the status quo will be maintained, with no significant changes taking place over the next few years
- » Although customers' expectations regarding the ecological aspect of the sector and respecting employees' rights will gradually increase, the process will not involve social groups large enough to exert pressure on the sector to implement universal changes
- » The sector will implement technological novelties, but as experimental implementations rather than a permanent element of sales activities
- » Customer needs will be met by both Polish and foreign producers, which will make it possible to maintain a stable level of employment, but will not generate an impulse favoring development of the existing or creation of new enterprises
- » This scenario will change neither the employment structure in the sector, nor the number of employees

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## Negative scenario

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- » The negative scenario assumes that the sector will not take steps to address the changes in its environment, including in the field of eco-conscious consumption and popularization of on-line sales channels
- » The sector will not respond to consumers' needs. The needs of those expecting high-quality sustainable products manufactured in an ecologically-friendly way will be met by foreign companies
- » The needs of consumers expecting mainly cheap products will be met by imports from countries where production of textiles and clothing is much less cost-intensive
- » Polish fashion and textile sector's lack of response to the needs of the market will lead to its gradual shrinking, thus contributing to new generations' lack of interest in educating themselves so as to find employment in the sector
- » This scenario assumes a decrease in demand for all groups of employees



Full survey results can be  
found in the Report (in Polish):

**Sectoral Human Capital Study  
Fashion and innovative textiles sector**

Results from the 1st edition  
of the study:

 <https://www.parp.gov.pl/component/site/site/bilans-kapitalu-ludzkiego#wynikibadanbranzowych>