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DIAGNOSIS

of the current situation in Baltic Countries in the field of vocational education and market sector

Research and comparative analysis of Latvian, Lithuanian and Polish textile and clothing industry

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Dressmaking

and Lingerie from three countries by the Baltic Sea

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Introduction – Description and competitiveness of textile and clothing industry focused on and including tailoring and lingerie market in Latvia, Lithuania and Poland

Textiles and clothing are among the first manufactured products an industrializing economy produces. They played a critical role in the early stage of industrialization in the United Kingdom, parts of North America and Japan, and more recently in the export-oriented growth of the East Asian economies.

Textiles and clothing is a unique industry in the global economy for three reasons. First, most developed countries of today and newly industrialized countries used this industry as the springboard for their development journey. Second, this industry has very low entry barriers (entry does not require huge capital outlay and factories can be set up with workers with relatively low skills). Third, this industry was the most protected of all manufacturing industries in the global economy, both in developed and developing countries.

The latter aspect has been changed since EU open market, when international trade quotes were removed. These arrangements had enabled developed countries to bilaterally negotiate quotas with supplier countries taking into account their competitiveness and the perceived threat to the domestic interests in the importing countries.

Lithuanian and Latvian textile and clothing industry is really similar and has long history of traditions and is one of the most important manufacturing sectors in their national economies. Lithuania and Latvia is one of the most specialized in textile and clothing manufacturing among the member countries of European Union. But, following the propositions of representatives of Lithuanian Apparel and Textile Industry Association (LATIA), global changes and correspondent shifts in Lithuanian economy have determined some challenges to the sector. The most obvious and meaningful are the decreasing role and input in to the local economy, declining significance in the Lithuanian and Latvian labour markets. In the above mentioned context, the aim is to discuss the current state of competitiveness of Lithuanian, Latvian and Polish textile and clothing industry.

Textile and clothing industry aggregates two branches of economic activity. It is combined with manufacture of textiles and textile products, so manufacturing of textiles and manufacturing of wearing apparel, dressing or dyeing of fur are aggregated.

The textile and clothing industries nonetheless continues to maintain a significant presence in the European Union countries. Such position could be challenged by the recent data illustrating relative importance of the sector in the national economies, measured by the share of production value in the total value of manufacturing sector. There is fairly obvious tendency to relative declining of textile and clothing sector's significance in the Baltic Countries. The relative share of the sector's production value is declining in the less developed countries, where the sector accounts for higher shares, as well as in the more developed economies, where the production value of textile and clothing industry hardly reaches 1 % in the total amount of the value of the production of manufacturing. It could be concluded, that the sector experiences considerable competitive pressure from newly industrialized countries, whose imports have penetrated especially western markets which we are focused within the project "Dressmaking and Lingerie from three countries by the Baltic Sea".

Basing on available Eurostat data the productivity of textile and clothing industry among European countries varied from around 50 thousand Euro per person employed in Denmark, Netherlands and Sweden (excluding Luxemburg, where the situation is not typical extremely deviating from the rest of the Europe) to the hardly 5 or 7 thousand Euro per person employed in Romania, Lithuania, Latvia, Slovakia, Hungary and Poland. Thereby, productivity level as one of the most important result-oriented indicators of competitiveness indicates that Lithuanian and Latvian textile and clothing sector is one of the least competitive among the European Union counties. Productivity in textile and clothing industry is lower comparing to the average of manufacturing total. The productivity growth in the textile and clothing industry most often is slower comparing to the average productivity growth in manufacturing total.

As part of a general restructuring trend, observed in most of Baltic Countries to cope with heightened competitive pressures and increased market volatility, firms in vulnerable sectors (including textile and clothing manufacturing) sought ways of streamlining their

production processes, rationalizing their supply chain and inventory management, downsizing, and seeking enhanced flexibility. Together with heightened economic volatility and increased competitive pressures along price and shortened life cycles dimensions, plus difficulty in acquiring and managing new technology, manufacturers in textile and clothing sector are forced to make significant process changes. These changes have led to the shifting of lower value-added jobs offshore, mechanizing domestic procedures whenever possible, and use innovative production systems to maximize the effectiveness of the remaining domestic workforce. A simple solution to the cost problem for EU firms to sub-contract to the low wage regions confuses international trade result oriented analyses of competitiveness.

There are five countries as a leading world exporters of the textile and clothing products (China, Italy, Germany, Turkey and India), along with the six other European countries (Poland, Hungary, Slovakia, Lithuania, Latvia and Estonia) that are comparable competitors in consonance with the productivity level. Nevertheless those mentioned five leading exporter countries account for nearly 50 % of world textile and more than half of world clothing products exports. Estonia, Hungary, Slovakia, Latvia and Lithuania are only small players, accounting 0.1 to 0.3 % of global market share in textile product exports. The production value exported by Poland reaches nearly 1 %.

The Polish clothing industry consists of two branches, same as in Lithuania and Latvia, meaning it is a production of knitting fabrics and production of clothes and fur goods. According to Central Statistical Office data an average Polish citizen spends on clothes more than PLN 600 on average per year what means that the market is worth about PLN 27.5 billion. Also according to the Central Statistical Office data concerning retail sales in Poland between last years the growth of clothing industry was one of the most dynamic.

In Poland data demonstrate that, compared year to year, the production of trousers, female coats, male suits and skirts witnessed a decline. Despite a relatively lower level of sales, many manufacturers managed to maintain the production level or even increase it. This rise concerns, i.a., production of men’s coats, ladies’ shirts and hosiery.

The clothing industry in Poland has the biggest number of franchise and agency sales networks compared to other industries. The textile and clothing industry holds a significant position in the production industry in terms of sales volume and the foreign trade turnover. The locations of clothing industry centers in Eastern Poland we would like to present basing on our region (Podlaskie), where it is located in Bialystok, Lomza and Zambrow, but also on the whose East side of Poland as a microregion.

Eastern Poland hosts a big number of businesses operating in the clothing sector. All of these business enterprises are private, and mostly they are small or medium family businesses. Majority of them is located in the Podlaskie, Lubelskie and Warminsko-Mazurskie Regions, with many of the clothing companies grouped in the vicinity of Bialystok, Lublin, Rzeszow and Olsztyn. Clothing enterprises from Eastern Poland include:

- clothing producers,
- sewing contractors for global brands
- fabric producers (cotton, linen, etc.)
- textile factories
- importers of semiproducts and finished goods
- retailers and wholesalers of various clothing brands
- franchise stores
- online shops.

Clothing manufactured in the regions of Eastern Poland is primarily an export commodity . Only a small part of total production is sold by the region's retailers. There are still relatively few manufacturers of own branded apparel although the clothing industry is among industries with the highest growth potential in Eastern Poland. The vast majority of enterprises act as sewing contractors for manufacturers outsourcing this task to them, mostly these are Western brand companies looking for quality. Eastern Poland is a region traditionally associated with clothing industry, where most of the positions are held by women and where average labor costs are relatively low compared to the rest of Poland.

Employees of the clothing industry in all Baltic Counties are usually relatively young or young to mid-age, which reflects the need for developing vocational skills in this groups

regarding clothing and lingerie sector which we focus on within this project. It is worth emphasizing that most of the managers and marketing specialists employed in the sector are young people, capable of facing new challenges and therefore, many a time, they launch start-up companies what shows also a good side of the young VET learners potential.

It is also worth to note the existing cooperation within the lingerie sector already mentioned in application of the project "Dressmaking and Lingerie from three countries by the Baltis Sea", and which is Podlaski Cluster of Underwear and Lingerie. It was established in 2008 in order to improve innovation and competitiveness of clothing enterprises from Eastern Poland within this production sector. At the beginning there was seven manufacturers and one distributing company. The cluster groups producers of such known brands as: Gaia, Kinga, Kostar, Ava, Axami, Gorteks, Mat. It also operates an online shop offering underwear by Kontri and a newly formed Gracya. According to the cluster's articles of association, the Cluster members are implementing joint projects related to i.e. building of a common brand, new manufacturing undertakings and sector market research with the assistance of local universities. The main goal of the Cluster defined in the articles of association is to support local entrepreneurs operating in the underwear making and selling sector. This support includes assistance streamlining processes, marketing guidance and general support in making good use of business opportunities.

Podlaski Cluster groups now over 20 entities manufacturing underwear and lingerie for the domestic and foreign markets, but nowadays it becomes more formal than real cooperation as the funding from EU has been decreased or even stopped for such an initiatives. The reason might be also that the manufacturers differ from one another in a number of terms, from workforce volume, financial capability, reconcilability, sales capability and the range of products. Despite that it has strong position as most companies in our region manufacture lingerie, including only one producer of men's underwear in the entire Podlaskie region. The same applies to beachwear manufacturers. Most of these entities are family businesses with different market experience, from 2 to over 20 years long. An essential asset of all companies is their highly qualified staff of seamstresses, corset makers, engineers and designers. Actually the Macroregion of Eastern Poland is becoming a kind of Polish underwear making center that now exports its products worldwide.

Description of VET systems – situation in Latvia, Lithuania and Poland including remarks for textile and clothing sector

Aims of the VET systems:

- to enable individuals with different needs and abilities to acquire qualifications and competences appropriate to the level of modern technologies, science, economics and culture, guaranteeing national economic progress, international competitiveness and sustainable development, key competences which help people to position themselves and compete in a changing labour market, to pursue lifelong learning, and to upgrade their qualifications;
- to facilitate the recognition of individuals' competences and / or qualifications attained in a variety of ways through vocational training;
- ensuring the availability and quality of vocational training;
- to ensure the conformity of qualifications with the needs of the national economy, international quality standards, objectivity assessment, awarding and recognition of qualifications;
- to ensure the effective functioning of the guidance system.

In all Baltic Countries involved in this project the respectively Ministries are responsible for shaping and implementing vocational education and training (VET) policy. The main priority for VET is to become an attractive and highly valued part of education and lifelong learning. VET programmes are designed for learners of different ages and educational backgrounds.

Initial VET (IVET) offers learners over 14 opportunities to acquire a first qualification. Continuing VET (CVET) is designed for learners who want to improve a qualification they have, acquire a new one or gain a competence needed to do specific jobs (perform functions) as specified in regulations. IVET is offered at lower secondary (ISCED 2), upper secondary (ISCED 3) and post-secondary education (ISCED 4) levels, leading to European qualifications framework (EQF) levels 2 to 4. Learners can acquire a vocational qualification and complete general lower or upper secondary education. Upper secondary-level VET graduates who have obtained a Matura certificate may apply to be admitted to higher education. When applying

for higher non-university education programmes in the same field, they can be awarded additional entrance points.

Although VET in our countries is school-based, practical training and training in enterprises are a major part. In IVET, practical training comprises 60 to 70% of the total time allocated to vocational subjects, of which 8 to 15 weeks is organised in a company or a school-based workshop simulating working conditions. Progressing implementation of apprenticeship is considered a national priority and policy initiatives are in process.

Formal CVET is designed for people with different education attainment levels, from primary to post-secondary; in some cases, a vocational qualification or work experience is a prerequisite. Programmes last no longer than one year and lead to a vocational qualification at EQF levels 1-3, recognised by the State. Practical training comprises 60-80% of the programme, half of it preferably taking place at the enterprise.

Formal CVT for unemployed and those notified of dismissal is funded by a voucher system, which allows the unemployed to choose the training provider. The provision of training is based on contracts between the local public employment service, the unemployed and, if applicable, the enterprise. After training, the employer undertakes to employ the person for at least six months.

Non-formal CVET for the self-employed and training for employees, initiated by employers, is organised in various settings. Some companies have their own training units and qualifications frameworks or apply internationally-recognised sectoral qualifications and programmes. Social partners have the right to initiate new qualifications, standards and VET programmes.

Competence assessment has been detached from the training process and now has been carried out only by accredited institutions. Social partners, enterprises and employers' associations may apply for accreditation. Employer representatives participate in designing and assessing VET programmes according to labour market needs. They are also involved in organising training and may participate in the management of VET institutions and become

their shareholders. Currently, social partners, enterprises and municipal authorities participate directly in managing self-governing IVET providers, which comprise a quarter of all VET institutions.

There are currently 74 VET institutions in Lithuania, including 15 VET centres, schools and labour market training centres providing training for the clothing and textile sector students. In Latvia there are 52 VET schools, including 12 VET centres, but the school with vocations related to clothing and textile industry there are only 2 – our Partner school from Liepaja and a school in Riga – capitol of Latvia. In Poland currently there are 78 clothing technical secondary schools all over the country of which 32 are located in Eastern Poland. Only 4 of them are located in the Podlaskie region while the biggest and most operative is located in Bialystok. Most of them in East of Poland are in the Lubelskie region, hosting 13 of them, 6 are in the Podkarpackie region, 5 of them are located in the Warminsko-Mazurskie region, and same as Podlaskie, 4 in the Swietokrzyskie region. Due to i.e. historical meaning of the clothing industry to Macroregion of Eastern Poland, the schools are of extremely high teaching competencies and appropriate technical facilities. So there is a great opportunity of developing well educated and multi-skilled staff if this VET sector continue to develop. Moreover, on the area of Eastern Poland there is also a rich manufacturing base which can be used by these future highly qualified workforce.

All the countries within this sector are training specialists in the following textile training programs:

- Fashion industry technicians
- Dressmakers
- Pattern Makers
- Producers of Fine Textile Garments
- Sewer-Operators
- Sewing Business Services Providers

EU countries including our three in Baltic Sea are is still in the process of searching for an effective apprenticeship model that would best suit our countries possibilities, traditions and production context. Today youth unemployment is still high, notwithstanding a

decreasing trend and going below the EU average. The government's aim is that in following years this indicator will not exceed 16%. Forecast economic growth is not expected to affect the employment in our countries in a significant way. It will only slightly increase by 2025 without reaching the pre-crisis level. This does not mean, however, that there will be no opportunities for jobs for young people and adults: the replacement demand forecast is expected to provide 14 times more job opportunities than newly created jobs. Therefore, the need for qualified and skilled workers will continue and, even become more prominent. most job opportunities are forecast in craft, building, metal, machinery, electrical traders; these are occupations covered by VET programmes.

An apprentice is contractually linked to the employer and receives remuneration (wage or allowance). According to the law regarding VET contracts and their registration procedure, two contracts are to be concluded before the start of the apprenticeship:

- an employment contract between a company and an apprentice that regulates training at the workplace
- a trilateral contract between the training company, a VET school or institution and the apprentice that defines the school-based part of the training programme.

Respective Ministries in our countries created procedures for formal VET outlines how apprenticeship training should be organised:

- the institution or the person providing apprenticeships should have a licence. This implies: institution providing practical training has to be authorised to carry out training activity and registered in the database of formal training providers and relevant persons who will be training apprentice(s) should have competed a course for pedagogical-psychological competences with a duration of around 120 hours. This requirement can be waived if a company cooperates with a VET provider,
- theoretical training of an apprentice can be carried out in the VET school based on trilateral agreement between apprenticeship provider, apprentice and VET school,
-apprenticeship is organised at the workplace with adequate equipment, tools and other technological as well as safety measures.

According to representatives of VET providers, the VET school is currently held responsible for all training-related matters, including the coordination of practical training in companies. Many VET representatives find their current resources inadequate for this responsibility of supervising students in companies; further, they receive resources only to ensure the final practice during the last training semester. No additional funding is provided, should they wish to increase the company-based component or take in apprentices from companies. Employers highlighted such issues as missing or unclear regulations (the apprentice status), ambiguous procedures for cooperating with the schools or insufficient involvement in the final assessment in VET.

The main concern of VET providers is that companies are interested in, and can only train for narrow competences needed in their business and would ignore transversal or generic skills. VET providers also want companies to take full responsibility for vocational content and for the implementation of student training plans. Companies believe that schools prepare students very narrowly for occupations while SMEs need workers with broader competences. Companies could take some responsibilities for training content but they believe that the school is in a better position to coordinate the entire content and bring school-based and company-based training together. Based on the responses of VET representatives regarding apprenticeship, they can take up the following:

- adjust existing programmes (up to 10-20% of the training programme content);
- select and monitor the companies that are eligible to take part in the apprenticeships;
- carry out information campaigns promoting apprenticeships for employers;
- intensify cooperation with companies and in-company trainers, provided additionalresources are available for this.

Companies could be more active in:

- implementing practical training in cooperation with VET schools;
- participating in the decision-making of VET schools (e.g. as shareholders);
- ensuring curriculum quality through contribution to drafting new or updating existing training programmes;
- contributing to final assessment, especially, to the assessment of learning outcomes of company-based practical training.

Analysis and description of study programs including assessment and recognition of non-formal/ informal education

All educational requirements only within tailoring classes and vocation as the most relevant for developing skills in the sector within those three countries involved in this project according to our analysis is basically the same and includes the following common parts of basic and non-basic requirements and needs for skills:

No.	Field	VET learners skills in tailoring	
		basic	over-basic
1.	Acquainting with the program and evaluation system. Occupational health and safety (OHS) in lessons, technical classes, educational requirements.	Student: lists the safety rules applicable during the classes indicates the place in the classroom (school) where the school's first aid kit is located lists the curriculum issues related to the classes - the achievement is not subject to assessment defines the requirements and the method of assessment in the lesson - the achievement is not subject to assessment	Student: identifies factors that influence accidents when using hand, power and electric tools lists the contents of the first aid kit demonstrates how to provide first aid in the event of an injury or burn

2.	Tailor's utensils and types of textiles	lists the principles of occupational health and safety (OHS) when using equipment that facilitates sewing and needlework handmade reads out and explains the operating instructions of devices used in the tailoring and knitting workshop justifies the need to create safe working conditions and adapt the equipment to individual works recognizes modern tools and devices and verifies his knowledge about the history of the creation of tools and devices in the tailoring and knitting workshop	lists inventions and discoveries used in tailoring and needlework defines the role of technology in the process of historical and social changes in the clothing industry

3.	Getting to know the basic materials used in the production of clothing	lists and explains the basic concepts related to the materials used in the production of clothing recognizes and names material samples, determines and compares material properties recognizes and explains the meaning of symbols placed on labels and rating plates (washing machines, irons, etc.)	discusses the methods of producing materials used in the production of clothing lists the inventions and discoveries used in the preparation of modern materials, e.g. Cordura, Polartec (fleece), Gore-tex

4.	Learning the basics of clothing design	explains the terms: "design", "fashion" presents and justifies the importance of the profession of designer and stylist designs its own collection for a specific occasion, e.g. an elegant party, carnival ball, exam, etc. uses ready-made patterns, e.g. from available magazines and the Internet distinguishes lines on blanks measures recommended body parts selects sizes based on taken measurements of the relevant parts of the body evaluates the role of the tailor's profession	gets acquainted with the principles of designing and making patterns makes a pattern (form), e.g. bags, sweatshirts

5.	Basic hand and machine stitches	recognizes and applies in practice the skill of manual and machine sewing with the use of appropriate tools and utensils explains the use of stitches in hand sewing sews independently on the machine, using basic stitches makes stitch samples designs practical work (e.g. wrapping a napkin, basting a handkerchief, sewing a cosmetic bag) selects appropriate materials and tools determines the sequence of activities in the implementation of work organizes the workplace does practical work demonstrates his work evaluates his skills	discusses the principle of the sewing machine, recognizes its mechanical elements knows the rules of maintenance of the machine and its use in accordance with health and safety regulations lists and points to parts of the sewing machine discusses the drive and mechanical system of the machine distinguishes between methods of joining parts of clothing or objects made of textile materials performs connection tests (snaps, hooks, snaps, Velcro, zippers, buttons) and applications

6.	Getting to know the properties of knitting materials. Yarns, wools, and tools.	recognizes, names and discusses knitting materials, their properties, variety of forms and textures decides on the choice of yarn, wool or twine or mouline and tools - wires or crochet to do the job explains the methods of making weaves and applies them in practice, making a sample	designs knitwear and performs work (e.g. scarf, headband, napkin, purse, bag, case) discusses the ways of making decorative elements, e.g. pompoms, without the use of tools and presents his own in practice skills

7.	Getting to know: weaving, braids, patchwork and hand embroidery	discusses the history of the emergence and development of weaving, braiding, patchwork and hand embroidery explains the techniques of weaving and making above mentioned presents algorithms for the formation of woven products and braids uses instructions for making braids presents the ability to perform samples performs a specific job, e.g. a mouline bracelet, a shoelace key ring, beaded jewelry distinguishes between fabrics and threads for embroidery and basic embroidery stitches and their application	designs patchwork, e.g. pillowcase, bedspread makes samples of embroidery stitches and shows the edge of the fabric according to instructions and drawings

8.	Performing a practical work summarizing the previously acquired knowledge and skills. Planning, design, execution and evaluation of work.	plans practical work (e.g. making a bag or piece of clothing) assesses his abilities and, on their basis, selects a working technique presents the stages of work plans the sequence of activities in the implementation of the project selects tools and materials organizes the workplace realizes his/her idea analyses and verifies his/her skills evaluates the product	none

9.	Learning the principles of planning and interior design. Selection of colors and textures	lists and explains the basic concepts related to interior architecture and industrial design recognizes decorative fabrics makes a collage, e.g. wallpaper, tile design	designs the selected interior
10.	Developing practical skills useful in everyday life	uses the instructions can implement the project	designs decorations designs entire compositions selects and completes materials for the project planning work carries out a selected project and evaluates the quality of work

Assessment and recognition of competences acquired through formal, non-formal and informal learning is a significant factor helping people enter the labour market. In Baltic Countries, competence assessment is a distinct process separated from vocational education and training (VET) provision and performed by accredited competence assessment institutions.

EU countries including Latvia, Lithuania and Poland does not have a common strategy for validation skills as a separate comprehensive policy document, however several laws were amended to pave the way for validation of VET (ECVET) and non-formal and informal education on a more mainstream basis, both at national and sectoral levels. It is integrated into education and labour market policies. The Law on non-formal education and continuing training, provides 3 cases of validation: competences can be recognised as a part of finalised formal education programme, as a competence to perform a regulated job or function and as a qualification, corresponding to a certain qualifications framework level (EQF).

The most common case is that competences can be recognised as a part of training programme (qualification), thus validation is rather an entrance instrument for the education. There is no special certificate that would evidence the recognition outcomes – for example, in VET, a final result of validation would be VET diploma. In terms of validation and recognition of vocational competences gained through non-formal and informal learning, VET standards are being used for validation purposes for the time being.

Once the development of sectoral qualifications standards is complete, they will be linked with education and training standards for validation purposes as well. In order to ensure quality and transparency of the assessment process, the competence assessment and validation process has been separated from the system of formal vocational education and training and can be undertaken by an accredited social partner or another legal entity. The main providers of assessment and recognition of non-formal /informal learning are VET and higher education institutions. VET schools and institutions can also assess non-formal study achievements and recognise the competences acquired on their basis.

Entering vocational education and training in all our three countries is rather easy as an individual person can apply to any vocational training institution, which has a license to carry out a training program in which the person can formalize their non-formal acquired competences.

Assessment of either vocational education and training, non-formal or informal learning acquired competencies can be recognized and formalized assessing the referring person's knowledge (test) and having analysed the documents (available various certificates).

Certification of achievements in vocational education and training is done if the result of the test and evaluation of certificates held of his knowledge being recognized as sufficient (that is equivalent to a person who has completed a certain vocational education or training program), it is being recorded in the register of students and passes the qualifying exam, leading to a diploma issued to a student. If the assessment shows that a person's knowledge is not enough sufficient, it is possible to attend a certain course, continue learning and then take a qualification exam and get a diploma.

Vocational education in clothing and tailoring attractiveness and effectiveness - image of the clothing industry

The clothing industry in the Baltic countries has been going through a crisis for years, which was reflected in the collapse of many clothing companies and the relocation of production to Asian countries in search of cheaper labor. Obviously, this had an impact on the fate of graduates of clothing faculties, as well as the schools themselves, educating in this field.

The number of graduates decreased year by year because they could not find a job in their profession. On the other hand, the reduction of recruitment by clothing schools quickly resulted in the closure of faculties of this profile and a massive retraining of the teaching staff.

Behind such a bad situation of the clothing market was the negative image of the industry, which through years of neglect in this sector, began to be associated with the image of hard work, completely different than in the Western world, where for years we have been dealing with a modern, dynamically developing fashion industry.

In addition, this stereotype was reinforced by a small increase in salaries in the industry in relation to other sectors, and thus the growing "gray area" and the lack of vision for professional development, and indicates the complexity of the problem from the point of view of employers and entrepreneurs.

According to our joint findings, the clothing industry is clearly threatened with a loss of jobs due to the external competitive threat. This industry is characterized by a long-term declining demand for labor, which results from the inflow of competitive imports to our countries, but also to Europe in general (i.e. to the potential sales market), imports mainly from Asian countries. This causes the number of employed persons to decline (by over 30%) and, moreover, their long-term situation is uncertain, as are the companies employing them.

Production in the industry fluctuates strongly under the influence of economic changes, because this is also how the demand for products changes. Consequently, there are periodical increases and decreases in employment (not counting the generally declining

trend), which means that some people with appropriate preparation, obtained while performing work, lose employment and it is not said that in times of better economic conditions they return to clothing companies . This may result in - despite the decline in total employment - failure to meet the demand for relevant professional competences, especially in more favorable periods for the industry as a whole.

The above situation is exacerbated by the fact that the industry as a whole is under the influence of competition, the main feature of which is low labor costs, so it is quite difficult to maintain a level of wages that stabilizes and in good times also attracts employees. Such an impact of foreign competition is additionally strengthened by internal competition from the gray zone in economy.

The structure of competences in the clothing industry is not homogeneous and at the same time significant changes in the production structure take place within the industry, which requires the flow of employment, e.g. from the production of clothing to the production of leather goods, and each of them needs different professional skills of employees. As a result, the industry may at the same time contribute to increasing unemployment and suffer from a lack of competent employees. Operational workers represent various levels of education and professional specialization. They must be competent to perform very simple works, requiring only training and those which include a creative approach to creating clothes: designers, cutters, constructors. However, simple competences dominate (about 2/3 of the employed are basic workers), so there does not have to be a direct relationship between the completed education and working in clothing companies, because the profession can be mastered through apprenticeships.

On the other hand, proficiency in performing repetitive, relatively simple activities plays an important role, which requires practicing them, which is possible both at school and during an appropriately intensive and practically oriented course, or even directly during production. The production of textiles and clothing is dominated by seamstresses, embroiderers and related (39.9%), tailors, hat makers and related people (5.2%) and workers in simple industrial work (4.7%), while in the production of leather and leather products - footwear (31.3%), seamstresses, embroiderers and related (11.4%), machine operators for the

production of shoes (7.3%), leather and related tanners (6.8%) and workers at simple jobs in industry (5.9%). Therefore, the vast majority of employees work in positions requiring basic vocational education or lower, only operators of machines for the production of footwear are required to have secondary education. Most of the above-mentioned professional activities can be mastered by practicing them.

Additionally, the competency structure constructed in this way was overlapped by the problem of periodic professional deactivation of employees in the clothing industry. Most of them are women (mainly in operational positions), many of whom in intensive childcare or sufficiently high social support in all countries participating in the project put work into the background, so that apprenticeships do not directly bring employers during this expected return period.

All the above-mentioned problems of the clothing industry contribute to its negative image, which translates not only into the employment structure in this sector, but also, and perhaps above all, into the education process preparing students to work in this area.

The biggest problem faced by the clothing industry is the lack of qualified staff. This is surprising, because mostly supply is followed by demand. Unfortunately, as we have already analyzed, despite the fact that the demand for professionals in the textile sector is growing all the time, unfortunately the number of graduates of schools educating in these fields in our three countries is decreasing. Moreover, those who finish them do not meet the employers' expectations due to insufficient competences.

The key to the problem is also to activate the teaching environment to constantly improve their qualifications, so that the teaching methods used by them are not outdated, and thus they are able to equip their students with the working methods expected by employers.

Apart from the obvious deficiencies in adjusting school curricula to the latest trends, which results in the lack of preparation of the teaching staff to educate young people with the spirit of the times, the fashion and clothing faculties also struggle with other problems. One

of them is technological deficiencies, understood as the lack of modern machines in schools. The result is the education of future graduates purely theoretically, which is painfully verified by employers later. There is, however, no clear desire among teachers to supplement their knowledge (the result is a mismatch between the qualifications of school graduates and the current requirements of the labor market).

Another problem is the lack of willingness on the part of entrepreneurs to provide practical apprenticeships in their establishments (entrepreneurs, in turn, believe that the problem lies in outdated teaching methods). The poor cooperation of teachers and schools with entrepreneurs and enterprises in order to educate the right staff has deep reasons.

The greatest barriers to cooperation with the education sector include: an educational program inadequate to the company's needs, incompatibility of expectations related to the form and scope of cooperation, complicated procedures for establishing cooperation, bureaucracy, lack of legal regulations, lack of funds for financing, lack of interest in cooperation . Building a good image among employees, regularly improving qualifications as well as acquiring and educating employees in a manner consistent with the company's needs are the main driving force behind the cooperation with the education sector undertaken by the surveyed companies.

The most popular form of cooperation between entrepreneurs and the education sector is the ordinary organization of apprenticeships and internships. Most of the recruited employees, in the opinion of a large part of enterprises, do not have sufficient practical preparation to perform tasks effectively at the workplace. Half of the surveyed enterprises actively participate in the personnel education process by organizing classes in schools and universities with the participation of their own employees who have the qualifications necessary to transfer theoretical and practical knowledge.

In addition, the difficulty in cooperation also stems from the method of financing such practices. Usually, it is on the employer's side. A minority share these costs with the education sector or benefit from EU funds. Despite all these difficulties, such cooperation brings tangible benefits to both parties, so it is certainly worth developing.

Conclusions - finding common points, main educational problems and needs of the companies in the industry

When we start analysing the situation of graduates of vocational schools in the clothing vocations, the main problem is the lack of interest in educating in these vocations due to the generally prevailing opinion that the work that will be available after graduating from such forms of education is difficult and economically ineffective. One of the main additional conclusions is the fact that the shortcomings in the education of people studying to work in the textile industry are also the result of competency gaps in the teaching environment. Teachers are not motivated to develop their skills, do not participate in training, and therefore cannot keep up with technological development. They lack competences in the field of machine operation, IT competences, and efficient use of a foreign language. These shortcomings directly affect participants in vocational training.

Success in the labor market does not depend mainly on having strictly professional qualifications, but also on having additional competences and skills, including mathematical and IT competences, efficient use of the mother tongue (Latvian, Lithuanian or Polish), but also a foreign language, understanding, organize, evaluate the value and importance of information and use them in action by creating information in a language appropriate for a given discipline, drawing conclusions, planning, predicting effects, including problem-solving skills, to personality traits expected by employers, i.e. an active attitude towards the environment, independent learning and undertaking tasks as well as observing the rules of social life.

However, the mismatch between competences and the labor market is not unique to the clothing industry. This situation is the result of the general model of education in vocational schools.

The main problems of vocational education are seen in the lack of basic skills, not only professional, but also social, in the graduates, allowing them to adapt to the work environment. Additionally, the problem is the scarcity of mathematics and physics as well as technical applications, even among technical school graduates. The next issue is a huge lack

of responsibility, accuracy and diligence, i.e. competences that are related to educating students by schools.

Schools in all three countries participating in the project tend to pursue purely theoretical education, without being translated into a practical dimension of work in a given clothing or textile profession. Some of the taught subjects are also obsolete in them. Another problem is the lack of good opportunities to organize internships or too short internships.

On the other hand, vocational exams do not provide entrepreneurs with any information and do not prove actual qualifications. There is no remuneration for schools for education in a given profession, desired on the market, and no real cooperation that is financially measurable for both parties. The financial problem in all project countries is the lack of differentiation of funding for schools depending on the cost of education in a given profession.

In the overall market, in the clothing industry, the problem for schools and candidates for training in this profession is the lack of reliable forecasts of labor demand - in the sense of trends of changes in the long-term, calculated on the basis of comparative advantages that are still taking shape in the economy.

The problem of schools is also detaching apprenticeships from the profession and accepting the "fiction of apprenticeships" - training a large number of students at a low cost and implementing apprenticeships as an unpleasant, obligatory element which is only the completion of a compulsory point in the education program.

Although the demand for specialists in this field is considerable, unemployment is equally high among graduates of vocational schools educated in these fields of study. The reason for such a state of affairs is the mismatch between the education model and the current market needs. Schools educating in clothing "produce" people with outdated competences, which results in big problems in finding a job. The educators are directly responsible for the quality of education, who in the ineffective scheme of the operation of vocational schools are not sufficiently motivated to expand their skills, and they have a key

influence on the quality and level of knowledge of their students. All these problems, additionally reinforced by the lack of cooperation between the education sector and entrepreneurs, create a negative image of the industry, which results in the liquidation of schools and faculties where future employees are educated in the textile sector. Therefore, the key issue, bearing in mind the forecasted further development of this branch, is to motivate the teaching staff to make efforts to improve their competences, creating appropriate conditions for them in the form of training and internships tailored to their needs, and to eliminate the negative image of this industry in general.

Therefore, the challenge for vocational schools educating in the clothing and tailoring professions is:

- general vocational preparation with solid technical foundations,
- territorial adjustment of the training offer to the needs of the labor market,
- conducting regional industry analyses and analysing the needs of the labor market in the long term,
- strengthening the local information transfer mechanism between schools and labor market institutions,
- creating a catalog of necessary skills – f.e. in modular vocational educational programs,
- a reliable system of documenting and verifying skills - both acquired in schools and during professional career, from the moment of internship or internship,
- increasing the real influence and involvement of entrepreneurs in vocational education,
- increasing the participation, quality and role of practical classes in vocational education,
- increasing the pool of competences necessary in the industry, with an emphasis on developing an attitude of responsibility and reliability as well as creativity in solving problems,
- changing the negative image of the clothing industry among potential candidates for training in professions related to this industry.

Analysing the situation of the clothing industry in the Baltic states, it is clear that it is an absolutely future-oriented sector of the economy, which in recent years has started to develop dynamically again, chasing global trends.