

Textile Education and Training in North-Rhine Westphalia

The EU Commission (DG Enterprise) has just launched a comprehensive research on the textile and fashion industry in Europe, focusing on various aspects of its situation and perspectives : trade, employment, SMEs, training etc.. The related call for tender has been won by a consortium led by Saxion University in the Netherlands, with the IFM (Institut Français de la Mode) being in charge of the Training Work Package. Our work is to be based upon the in-depth analysis of 3 major regions : among them, Nord-Rhine Westphalia has been selected as a key place to understand how issues relating to innovative textile skills supply and supply/demand matching are efficiently handled and where best practices can be found out.

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1. THE INDUSTRY

a. Present situation of the Germany and NRW textile and clothing industries

North Rhine Westphalia is the largest federal state in Germany with more than 17 million inhabitants and an unemployment rate of 8.5 % in total¹. In the last decade, NRW economy has seen a steep increase in export orientation. In 2010, NRW earned EUR 543 billion, 21.7 % of the total German GDP. Thus North Rhine Westphalia is economically the most important state in Germany, as well as one of the most important economical areas in the world.

The textile and clothing industry has a long tradition in Germany, and has been in a critical phase for several decades. Nevertheless the clothing industry was one of the first branches which had to react to the internationalisation process, and later to significant change of the mid-1990s due to globalisation effects. The German industrialists recognized very early how useful the machinery industry is, and the leadership of NRW textile industry is partly due to a lot of machine manufactories. Thus, the manufacture of machinery and equipment represents a total sales of EUR 41 billion and ranks as the second manufacturing industry in NRW, just behind the chemical industry².

Today, German textile market share is: Clothing 20 %, Home textile 20 %, Technical textiles 60 %³. Germany is the European market leader in the technical textiles sector which is projected to have the best growth potential due to manifold applications and high innovation grade. Classified according to German federal states, the textile and clothing industry centers are in North-Rhine-Westphalia, Baden-Württemberg, Bavaria and Saxony.

Leadership upgrading in quality is of primary importance for German businesses. Today, the German textile industry ranks 5th in innovative products rating⁴, just behind the German machinery industry (4th). The German electronics industry ranks 2nd, whereas the German chemistry industry only ranks 6th. Main key NRW textile areas are Münsterland, OWL (Ostwestfalen-Lippe), Wuppertal zone as Niederrhein with Mönchengladbach and Krefeld.

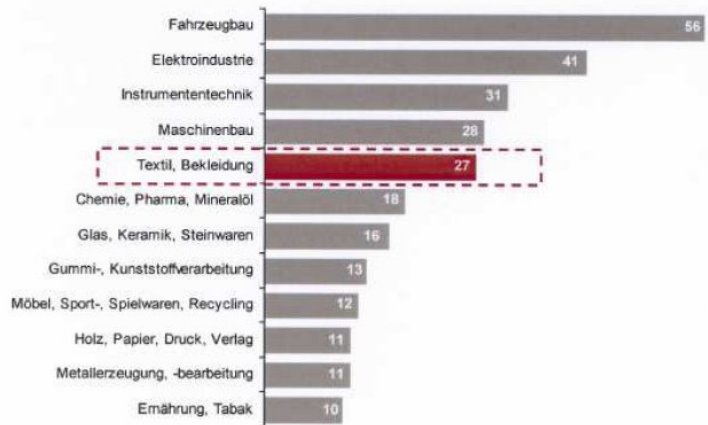
¹ Regional Labour Market North-Rhine-Westphalia (Germany), laboureconomics.wordpress.com, 27 April 2011

² Location Profile of NRW, NRW.INVEST, June 2011

³ according Dr. Dieter Veit, academic director, ITA of RWTH Aachen

⁴ Association of the Rhineland Textile Industry (Verband der Rheinischen Textilindustrie e.V), Lindlar, 26 Nov. 2010

Innovative products ratings in German industry, revenue generated by new products (%)



Umsatz durch Produktneuheiten in % (2007)

Source: Gesamtverband textil + mode, 2007

As a matter of fact, it is difficult to evaluate how many employees really work in the NRW textile industry. Today the chemical industry offers specific materials used in technical textiles and reinforcement textiles are useful in composite industry. So these industries have to be considered also.

Textile economy in NRW - 2009⁵:

companies of the textile industry	221
companies of the clothing industry	84
companies of the mechanical engineering industry	30
"textile" research institutes	12
employees of the textile industry	35 000
sales of the textile industry	6.6 euros billions

Machinery tests are made in Germany for China or India. Moreover, the chemical industry is strong, with leaders like BASF or Bayer. Most of the chemical companies do a lot of research to develop new fibres. Nevertheless, the textile chain is weakening in Germany. The machinery industry does not develop very sophisticated processes because main Asian end-users do not need them. Concerning chemical companies, it is not easy to have the right chemistry for niche products today. German industrialists have implemented major changes in their industrial organization and the future for the NRW textile industry is the competition in niche market products with European countries.

With 6% of the total EU 27 textile and fashion employment, but almost 15 %⁶ of the wages and salaries paid to the workforce in the EU, the German industry is a major economy of the sector. Sizes of units are very similar in Germany between textile and fashion manufacturers.

An important characteristic of the German textile industry is the dominance of companies with a large revenue, with an average of 94 employees per unit. Especially the technical textile industry has all characteristics of the German Mittelstand (SME - small and medium enterprise).

⁵ *Textile & Mode NRW - Structure and Activities*, ZiTex, april2010

⁶ IFM estimate based on Euratex and Eurostat data 2009.