



FOSTEX

Project No - 598347-EPP-1-2018-1-ES-EPPKA2-CBHE-JP

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PROJECT FOSTEX Deliverable



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D.1.2. The National Report/ Focus Group Report



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2. Abbreviations and Acronyms

Abbreviation	Full name
EACEA	Education, Audiovisual and Culture Executive Agency
EC	European Commission
EU	European Union
GA	Grant Agreement
HEI	Higher Education Institution
ICT	Information and Communication Technologies
PC	Project Coordinator
WP	Work Package



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1. Executive Summary

This report constitutes an analysis of the deliverable D1.2 of WP1 of the “Fostering innovation in the Jordan and Moroccan textile industry [FOSTEX]”; an Erasmus+ project, which aims to create and maintain a link between Universities and businesses of the textile sector that will foster innovation and the manufacturing of high value quality products, as well as further cooperation between EU and Jordan and Moroccan Universities and textile businesses.

In Jordan, two focus group discussions have been organized by the JO partners in FOSTEX project in March, 2019. Total number of participants in the two focus groups exceeded 40 participants from different textile sector stakeholders. These discussions were very fruitful to identify the problems and challenges facing this vital sector in Jordan, to determine its needs, and to recommend solutions to promote and enhance its performance. To ensure some comparability between the two focus groups, the same set of questions were asked to participants at each meeting. Analysis of the discussions showed the dramatic decline of this industry in Jordan and highlighted some reasons behind this decline. Areas of collaboration between the textile industry sector and the academia in Jordan have been identified, and suggested to be implemented partly in the Hubs (centers) that will be established at JUST and BAU. Some solutions, suggestions, and recommendations to the government have been also identified in these focus group discussions.



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2. INTRODUCTION

Jordan has over 60,000 employees in the textile industry and generates 1.2b€ in exports according to the World Bank trade data. Jordan, however, has a largely concentrated textile industry in very few high-end brands which benefits from duty-free trade agreement particularly with US since 2001 when the sector began soaring. Recent EU decision (L233/6) to simplify the rule of origin for Jordan was aimed to enable the country facilitated access to market to EU and ultimately directed towards job generation in the region refugees with a target of 200,000 refugees.

Small and medium enterprises of the textile sector in Jordan are mainly of semi-industrial companies and small craft-oriented workshops combining manual and mechanical processes with basic equipment. Only a few large industrial companies exist with state-of-the-art facilities.

The Jordanian textile sector suffers from a high fragmentation and a lack of quality control in all stages of the value chain. Apart from a few large ones, the vast majority of companies involved in the textile manufacturing supply chain work on highly ineffective and low quality production techniques using outdated technology. Moreover, the Jordanian textile industries face the high competition from imported textile products from China (34% market share) and other Asia countries (Bangladesh, India, Cambodia and Vietnam accounting for another 32.6% of EU textile imports) that has the advantages of lower production costs as benefits of economy scale.

The future of the textile industry in Jordan raises concerns among the specialists participating in this group discussion who stressed on the government of Jordan to rescue this sector and promotes its growth and competitiveness.

FOSTEX is an EU funded project through Erasmus+ Project, that aims to create and maintain a link between universities and businesses of the textile sector that will foster innovation and the manufacturing of high value quality products, in Jordan and Morocco. The project also aims to help and encourage the Moroccan and Jordanian governments to favors the establishment of textile centers within universities and to promote research and projects between EU and Morocco



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and Jordan universities in the textile sector, by creating a research innovation and training network, which will continue to operate and after the end of the current project. Thus, FOSTEX project aims to fill an apparent gap in the area of specialized services for the textile sector with the establishment of four textile centres in local Universities, two in Jordan and two in Morocco, utilizing the experience and expertise of EU partners in the area of services for the textile sector. Through the creation of these centres and the further tasks that will be implemented in this project, the textile sectors in Jordan and Morocco will be offered access to business development services, such as quality testing, product certification, training, fashion trends, production organization, B2B and funding opportunities, and subsequently, the Jordanian and Morocco textile sector will have a valuable result for its further development.

3. METHODOLOGY

In order to identify the needs of the textile industry in Jordan, focus group discussions approach has been adopted as the qualitative approach. Group dialogue tends to generate rich information, as participants' insights tend to "trigger" the sharing of others' personal experiences and perspectives in a way that can more easily or readily tease out the nuances and tensions of complex topics and subjects – a dynamic that is not present during key informant interviews. Analysis of the reports of these dialogues can help in designing and developing quantitative techniques that are based on surveys and one-on-one interviews. Two focus group discussions have been arranged to be conducted in Jordan on 27th of March 2019, with around 20 participants in each focus group, representing the different stakeholders of the textile sector in Jordan. Annexes I and II contain the list of participants of each focus group. Each focus group took about 120 minutes. To our knowledge, these national focus groups were the first of their kind relating academic staff to their counterparts' textile industrial experts in Jordan. The focus groups also included Amman Industrial Chamber as a policymaker. The discussions focused on identifying the status of the textile industry in Jordan, areas of collaboration between textile industry and academia, and recommendations to the government to help and promote the textile industry sector in Jordan.



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4. KEY RESULTS

4.1. First Theme: The status and the future of the textile industry in the country

1. The textile industry in Jordan contributes to more than 25% of Jordan's exports. However, this sector faced many challenges during the last few years, which resulted in closing many facilities and many of the small businesses have been forced to be out of business. The absence of any regulations on the imported textile and cloth products and the absence of any incentives to the local textile products contributed significantly to the damage of the textile industry in Jordan.

2. Only few companies export their products to the US, EU, and other countries. Most of these companies are either non-Jordanian or international companies that are interested in benefiting from free zone regions and areas in Jordan, which are exempted from taxation and costumes. Small businesses cannot export their products and even cannot compete in Jordan markets, due to the following reasons:

- The labor high salary
- The expensive raw material for cloth industry.
- The regulations of government for free-trade agreements, which make the nationally produced cloth more expensive than the imported cloth in same quality in the national market.
- The regulations of the government on the taxes on the industries.
- The old and non-fashion designs of cloth which make the customers buy the better designs even with low quality.

4.2 Second Theme: The needed steps and regulations from the government to help the textile industry in the country.

1. All participants agreed that The Free Trade Agreements, which are the first governmental regulations and policies to make the competition between the imported and nationally produced cloth, depend firstly on the low-price market. Participants indicated that given the economic situation in Jordan, most of customers do not care for the quality of the raw textile



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of cloth because they are interested to buy lower- price products, especially if they are more modern colors and designs.

2. The participants argued that the following actions may help revolving the textile and cloth industry in Jordan and may also help the cloth products to compete with the imported products. These actions include:

- Establishing a unit or laboratory to test the imported cloth products, and each batch of imported products has to be checked and tested; at least comparable to the national products. The participants show their interest to cooperate with Amman Chamber of Industry (ACI) to make the regulations and policies fair toward the imported and manufactured products by implementing the quality-standard codes on the imported cloth products to Jordan.
- Providing incentives to exported Jordanian cloth products; similar to those in China and Iran, so that Jordanian cloth products can compete in the regional markets.

4.3 Third Theme: The collaboration with the universities

1. The training for both textile and cloth industries should focus on using the best techniques and machines and producing high quality of cloths, and lower cost, higher quality and varied in designs products. This includes

- Offering in-factory training to enhance the workability and profession current workers.
- Offering a special training for the cloth industry.
- Offering a special training for modern textile used for cloth; combination for cloth and design issues.

2. Establishment of two research centers at JUST and BAU equipped with the needed instruments testing textile and cloth products will foster the collaboration between the textile industry and academia. These centers can also be used as research and development unit for the cloth design, process and support.

3. Establishing an education program at the community college or university level to teach and train students and workers, will produce well trained and skilled labors and professionals who can make the industry more competitive.



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5. CONCLUSIONS

Two focus group discussions have been held in Jordan at Amman Industrial Chamber with diverse group of participants representing textile and cloth Manufacturers, and Jordanian Universities. These focus groups aimed to discuss the status of cloth and textile industry in Jordan, identify problems and challenges, recommend solutions, and determine the needs to promote this sector. The participants indicated that the textile and cloth industry lost its competitive edge that used to have 10 years ago. They blamed the government regulations for the decline of the cloth industry in Jordan. The participants indicated that there is a need to provide the workers engaged in cloth and textile industry with training on the use of textile manufacturing and the cloth modern design. At the national level, they stressed on the government of Jordan to allocate issue and adopt regulations and incentives to revive the textile and cloth industry in Jordan. The participants also emphasized on the importance of collaboration between Jordanian universities and the industry, stressing on the importance of establishing an educational and training program related to textile and cloth design manufacturing at the Jordanian Universities.



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Photos



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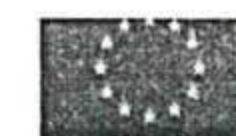
Attendance Sheet of the Focus Groups Meeting, ACI

27, March, 2019

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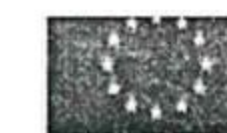
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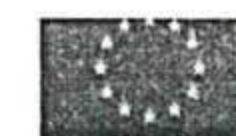
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