

# **Baseline Assessment of MSMEs in the Textile and Apparel industry for clustering in Lesotho: The Case of Maseru**

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**ABSTRACT:** *This paper presents a baseline assessment of micro, small, and medium enterprises (MSMEs) operating within Lesotho's textile and apparel sector, with a focus on clustering potential and industrial readiness. The research employed structured interviews, textile and apparel product evaluations, and observational methods to evaluate production skills, equipment sufficiency, and entrepreneurial motivation. A total of 188 MSMEs were assessed, revealing strong foundational skills in garment construction and fabric economy, but significant gaps in textile science, specification sheet interpretation, and quality assurance systems. Business acumen—particularly in marketing, financial management, and sourcing—were found to be feeble. Despite these limitations, 86% of participants expressed high motivation to scale operations and engage in industrial production. The study proposes a four-tier clustering model based on skill and equipment levels, recommending targeted training, centralized services, and policy support to enhance competitiveness. The findings inform strategic interventions for export readiness, industrialization, and sectoral transformation. The report concludes with recommendations for digitized production training, care labelling education, MSME registration support, and the establishment of a standards regulation authority. This assessment lays the groundwork for inclusive, skills-based clustering and sustainable growth in Lesotho's textile and apparel industry.*

**KEYWORDS—** *MSMEs, Textile and apparel sector, Skills assessment, Clustering strategy, Industrial readiness, Lesotho, Entrepreneurial development, Export competitiveness*

## **I. INTRODUCTION**

This study aimed at evaluating the state of the Textile and Apparel Industry to better understand its probable ability that could enable or hinder production and exports. This is done in preparation for the government of Lesotho to build human capacity and other areas that may be requiring enhancement through the Ministry of Trade, Industry and Business Development (MTIBD). The product development process is inevitable; evidently, need is likely to arise for the present personnel in the textile industry to produce textile products that they have never produced before in line with the identified market requirements, the skills are kept in check to identify and bridge any gap realized.

The ministry –MTIBD, intends to support potential entrepreneurs in the textiles and apparel industry/trade in establishing production clusters to scale production and marketability of textile products that have solely been produced by Basotho. To enable the accomplishment of the goal stated above product development will have to happen, businesses will have to be managed, coordination done well, production scaled up, marketing done locally, regionally and internationally, as well as facilitation of the backward and forward linkages. It was essential therefore to conduct the baseline assessment. In this assessment the main areas of focus were production skills, quality assurance skill, basic business skills, infrastructure inclusive of machinery/equipment. The ultimate goal is to enable the MSMEs to take advantage of the international markets particularly those made accessible through African Continental Free Trade Area (AfCFTA).

### **1.1 Importance of Baseline Study**

Generally baseline studies are critical starting points of guidance where transformation through developmental efforts are envisaged. Data from these types of studies contributes immensely in planning the developmental initiatives. For continuity, results from baseline study will inform further training to build industrial capabilities. Among other elements of significance, skills assessment of any form denotes an important vehicle for analysing and monitoring skills coverage across organisations and nations and identifying skills gaps and mismatches that exist (McGuire et. al., 2022)<sup>[1]</sup>. This is most essential when a transformational initiative such the potential production for international trade is envisaged. According to Tuccio et. al., (2023)<sup>[2]</sup>, the first step to help adults navigate changing labour markets is to take stock of their skills. Profiling an individual's skills accurately is particularly important for those who have been out of formal education for many years and those without a formal qualification, or for those who have predominantly worked in the informal

sector. This is the situation most MSMEs in the textiles and apparel industry assessed for purposes of this study are in if it is not all of them.

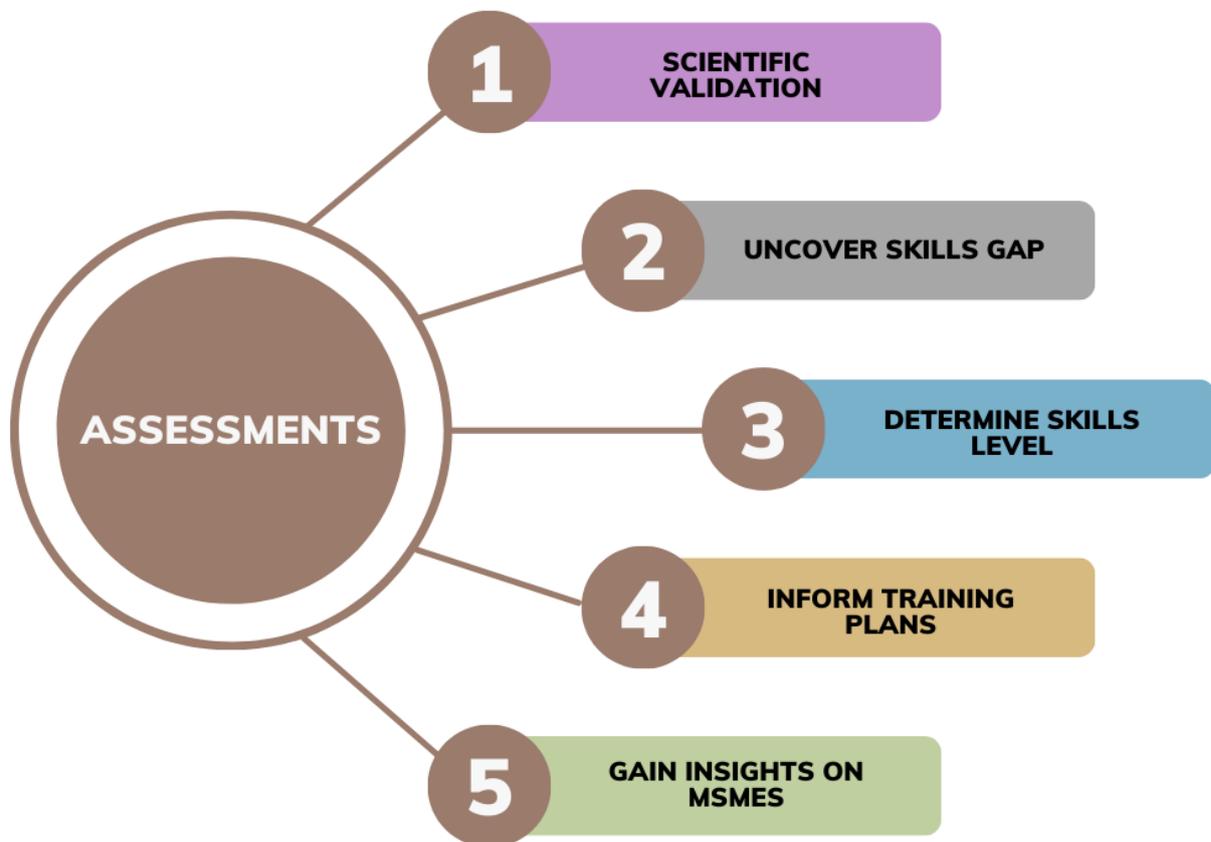


Figure 1: Some essential reasons for conducting this baseline study

### 1.2 Baseline Study Objectives

The study was set out to accomplish the following objectives:

1. Assess the type and level of skills possessed by the MSMEs as they are required for garment/apparel construction and all other areas of business establishment and management within the textile industry.
2. Gauge the sufficiency and state of equipment the respondents were in possession of relative to their current production.
3. Appreciate the flexibility and potential interest in continuity/developmental growth in the industry.

### 1.3 Challenges and Limitations

During the assessment multitudes of MSMEs showed up as participation was opened up through snowballing and it was not easy to turn people away, they came with great anticipation for better living and assistance towards business development. Additionally, the movement of some participants from the city to their homes was a great challenge especially after the numbers increased and the businesses are situated in diverse places distributed in no particular order within Maseru. These challenges resulted in notable delays and difficulty reaching everyone whose name appeared on the list, despite the fact that far more participants were assessed than initially intended.

## II. STUDY METHODS

The target group in this study was the MSMEs enterprising in the Textile and Apparel Industry (TAI), these are all self-employed functioning formally and informally within the Maseru district. The assessment conducted was done by a practicing professional to individuals though large groups were evaluated. Besic et. al., (2019)<sup>[3]</sup> describe this method as skill profiling. It was done to enable the selection for inclusion in the clusters and the actual clustering process and determine the type/magnitude of training required. According to Besic et. al., (2019)<sup>[3]</sup>, skills profiling is conducted by a professional and is used to identify skills that need further

development; secure a new job; undertake particular learning actions; or/and formulate a personal development plan based on an individual client's 'needs.

The study essentially employed group interviews, observations and evaluation of the finished products made by the participants. Snowballing technique was used to access active MSMEs in the industry. The group administered questionnaire was used for data collection, the questionnaire was explained to everyone by the consultant/expert. The respondents were then allowed to mark appropriate answers. Observations were also conducted to evaluate the working space, finished products and the equipment.

Descriptive statistics has been used on the quantitative data while content analysis has been employed for the more qualitative data to retain the richness, credibility and originality of the responses from the participants. Kleinheksel, et. al., (2020)<sup>[4]</sup> define content analysis as the process of considering the participant and context when sorting text into groups of related categories to identify similarities and differences, patterns, and associations, both on the surface and implied within. In the application of content analysis for this study, themes were not predetermined but generated from the data collected.

### **III. FINDINGS**

The findings of the study as guided by the objectives were categorized into four, each of these categories were limited to areas within the control of the participants otherwise there could have been more to report on that would not be easy to address or correct through training. All of the four categories play a notable role in the development, advancement and establishment of new levels of existing firms or new ones altogether.

- Skills
- Equipment
- Fervour
- Entrepreneurial Practice

#### **3.1 Note applicable to all the graphs**

This is to report that 185 respondents were assessed through structured interviews and their products evaluated individually while some practices in production were observed. From the data collecting instruments capturing of all the 185 papers was done and during this process there were some responses that were declared as unreportable, technical terms in research they would be called "non-sense data". They include ticks made outside of the boxes making it difficult to know where they were supposed to be or a skill that has not been responded to. For this reason, some of the reported data in all the graphs in this report will not add up to the total of 185 yet it is the number of evaluated MSMEs.

#### **3.2 Skills**

The skills assessed were further classified into groupings with a direct bearing on dynamic production in the textiles and apparel industry. These are production skills, business skills and peoples' skills. All except production skills were kept basic and at a bare minimum. This was done with a resolve that such skills may be outsourced, if need be, to avoid missing out on personnel highly skilled for production because of a shortfall in the other skills.

#### **3.3 Production skills**

The skills evaluated in the production category comprised of the essential ones in apparel manufacture. These include fabric identification and selection, interpretation of specification sheet/garment description, pattern making, fabric economy, cutting, creativity, standardization and quality assurance/control. There are more skills applied in apparel manufacture but the above stated are the most essential without which production will be disadvantaged and quality of products compromised.

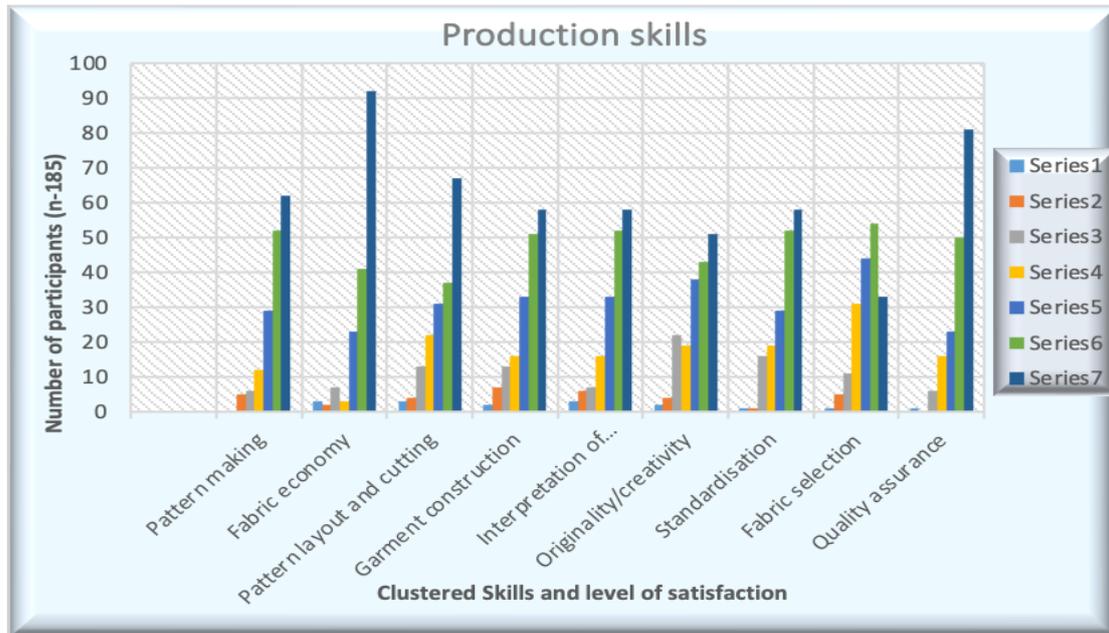


Figure 2: Extent to which Production skills are satisfactory (as rated by participants)

### 3.4 Fabric Identification and Selection

The basic understanding of fabrics enhances appropriate selection for different types of products. Some firms employ Textile Scientists or outsource the fabric selection because different fabrics have different properties making each fabric suitable for certain garments and not for others. The scientific studies of textiles ensure immediate recognition, understanding and appreciation of these properties as they are determined by the origin or the fibres making up such a fabric.

The skill to identify and select fabrics is the only one that most respondents were not well acquainted with as only 33 participants out of 185 (only 18%) agreed to have full satisfaction of skill acquisition (see Figure 2). Some respondents appealed to possess notable ability to identify and select fabrics as it can be seen in Figure 2, this can be attributed to their extensive experience as most of them have been in the textiles industry for longer than five (5) years. The time spent in the industry has contributed positively on this ability to identify and select fabric. However, the fabric properties are not understood by these players in the industry and this will inhibit them from developing care labels that need to accompany the products they will have made especially for exports. Care labels form an essential part of textile products on international markets as they give essential information about the use, care, laundering, ironing and disposal in an environmentally friendly manner. According to Maqalika-Mokobori, (2005)<sup>[5]</sup>, labels can influence consumer decision making process if the product demands a lot from a consumer for its care such as ironing or dry-cleaning.



Figure 3: Sample of apparel care label

Apparel manufacture trading on global markets needs to be able to develop a label that gives accurate information about the product attached appropriately. Most manufacturing countries have legislative acts/regulations intended to govern the labelling process and the authorities for enforcement of the same.

The hand-feel, texture and drapability of the fabric are some of the characteristics influenced by fibre content as well as the yarn and fabric construction processes. This has been supported by Özdil et. al., (2014) <sup>[6]</sup> who stated that fabric stiffness and handling is an important decision factor for the end users and the degree of fabric stiffness is related to its properties such as fibre (material type), yarn and fabric structure. A study by Amuthakkannan et. Al., (2013) <sup>[7]</sup> specifically investigated the effects of fibre length and content of some mechanical properties of fabricated composites and fabrics, an emphasis on the need to understand some basic fabric/textile science or at the least the behaviour of fabrics.

### **3.5 Interpretation of specification sheet**

The garments specification is defined by Islam, (2015) <sup>[8]</sup> as a document of a product that contains detailed information about the product that the manufacturer needs to know to be able to produce such a garment. It is provided by the buyer to the garment merchandisers at the beginning of a garment export order. It is very important for the merchandiser, Quality team, and Buyer QC; an export order cannot be executed without it as all the necessary information is mentioned here. The sample section and merchandiser coordinate everything by specification sheet during the product development/ sampling stage.

Table 1 below tabulates the information that an accurate specification sheet from the buyer must contain in guidance of the entire manufacturing process.

**Table 1: Contents of the Specification sheet**

<b>INFORMATION GIVEN ON THE SPECIFICATION SHEET</b>	
1	Product sketch or design of front and back
2	Product Description
3	Product category, group, product code, and style name
4	Bill of material (BOM)
5	Garments Construction and necessary instruction to sew
6	Fabrics Specification
7	Label instruction
8	Points of measurements and their upper & lower tolerances
9	Size-wise measurements
10	Art-work
11	Sticker attaching instruction
12	Wash and Ironing/ pressing instruction
13	Embroidery and printing placement (If any)
14	Folding instruction
15	Packing instruction

Working an international consignment without proper understanding and interpretation of the specification sheet is detrimental for the entire manufacturing firm. Accurate interpretation is therefore one of the pivotal skills required in manufacturing for professional and international trade. A sample of the specification sheet can be seen in Figure 4.

### **3.6 Pattern making**

This is essentially a process by which the technical specifications of the garment to be manufactured are determined and set into a pattern from the design concept. The specifications include but are not limited to the dimensions, shapes, and seam allowances in the pattern pieces. Pattern making can be done manually, by draping the fabric on the dress-form or by Computer Aided Design (CAD). According to GABE clothing, (2023) <sup>[9]</sup>, pattern making serves a pivotal role for clothing start-ups. It aids in maintaining a standard fit across different sizes, ensuring the consistent quality of the produced garments. A well-executed pattern can streamline the production process, reduce fabric waste and enhance efficiency. Moreover, pattern making can influence the cost-effectiveness of production, making it a critical consideration for start-ups working within tight budgets. Furthermore, GABE Clothing continue to emphasise that good pattern making is the cornerstone of good clothing design, highlighting that clothing start-ups that neglect this step risk compromising their final product, potentially leading to wastage, increased costs, and customer dissatisfaction. Most respondents rated themselves as skilled in this area as it can be seen in Figure 2, the highest number of participants is in the seventh (highest) level of satisfaction.

### **3.7 Cutting and Fabric economy**

Cutting is a process of separating the fabric into design units called pattern pieces as replicas of the pattern in the marker. Fabric cutting is done following some specific criteria that ensures precision of cut, clean

edges, unscorched/uncorked edges, support of lay and consistent cutting edges. The goal described in the paragraph above there are four main processes that have to be done, they are:

- Marker preparation
- Fabric spreading
- Fabric cutting

**3.8 Preparation for the assembly process**

Following the processes listed above during the cutting process will contribute to economizing on the fabric. Participants indicated high level of attainment for this skill of cutting and fabric economy. From the findings as it can be seen in Figure 2 accomplishment of the fabric economy skill has been ranked the highest with 41 and 92 out of 185 participants at 6 and 7 respectively, these are the highest levels of skill accomplishment. A total of 153 of 185 (83%) declared as highly skilled in fabric economy when cutting out garments for construction. This is understandable as they would want value for their money used to buy the fabric, more so to maximize on profits and minimize on the expenses wherever possible.

The common practice among the respondents in this study does not include the preparation of the marker which can contribute in fabric economy and save time. The textile industry in advanced countries and factories now boast the professionals trained and practicing as marker makers. This specialized training and function improves quality of operations within the manufacturing factories in apparel production. Additionally, a simple pair of shears is generally used by the participating MSMEs for the cutting process while there are numerous high techs cutting machines available on the market now, most of the large fabrics and accessories shops in Maseru sell some of these machines. A centralized cutting service is provided at BEDCO in Maseru using such technical cutting machines which can quicken operations.

**3.9 Standardization**

Standardization is a process of making something adhere to the set standards, it means that first there has to be a standard in place and against which the product or service can be evaluated. This process is important in manufacturing mostly because it helps to maintain consistency which enables replication of compliance, quality, size, preference and durability. Standards are legislative and remain in the hands of policy makers often with little or no input by the professionals and other beneficiaries of such, however each organization may establish internal standard operations procedures (SOP) to govern processes performed. SOPs include the purpose of processes, the equipment/tools and materials required for the processes and procedures to be followed (Sivakumar, 2015) <sup>[10]</sup>.

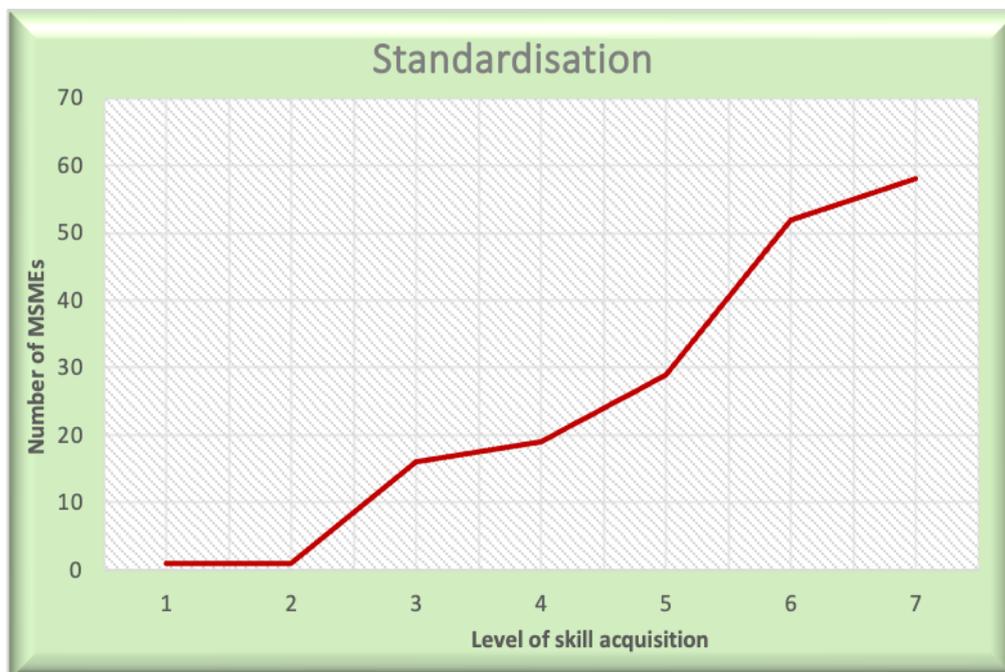


Figure 4: Standardization

From the findings it is apparent that some participants find themselves able to standardize and are supposedly executing the standardization. As it can be viewed in Figure 4, 58 out of 185 (32%) respondents classified themselves as standardizing in their day-to-day processes of garment construction at the highest level while 37 out of 185 (20%) reported to have little or no acquisition of the skill nor practice it as they

manufacture. There are 81 out of 185 respondents (44%) who reported average to high level of acquisition and practice of the skill to standardize.

**3.10 Quality Assurance / Control**

Quality may be defined as the acceptance level of goods and services; this attribute is measured differently for various products and services. In the textile and apparel industry, product quality is assessed calculatedly in terms of quality and standard of fibres, yarns, fabric construction, colour fastness, designs, workmanship and the final finished garments Rahmal et. al., (2009) <sup>[11]</sup>. Deviation from the set levels of quality in garments may attract discounts and losses or utter rejection that results in the establishment of the factory shops that sell rejected products. It is therefore vital for the MSMEs to ensure quality of garments they manufacture to avoid loses.



Figure 5: Appreciation of quality assurance by respondents

From the results, 81 of 185 (44%) MSMEs reported awareness acquisition and execution of the skill. The assurance of quality ensures repeated purchases by the present clients and attraction of the new one, it has to be instilled and turned into a daily requirement if the business in textiles is to flourish. The results are encouraging however there is ample room for improvement. Hossain et. Al., (2018) <sup>[12]</sup> suggested that good quality of textile products can be achieved either by meeting the standard norms as devised by the buyer or by passing the complete parameters for further shipping out the goods to the end user. Quality assurance systems are essential to make the quality of garments to be regularly and systematically assured and controlled.

**3.11 Use and care of Sewing machine**

A sewing machine is the one most essential piece of equipment in the garment construction business, hence the need for those engaged in the industry to have an unquestionable skill to use and care for it appropriately to avoid damage and repeated repairs. Most participants attested to the acquisition of such a skill and were indeed confident about it.

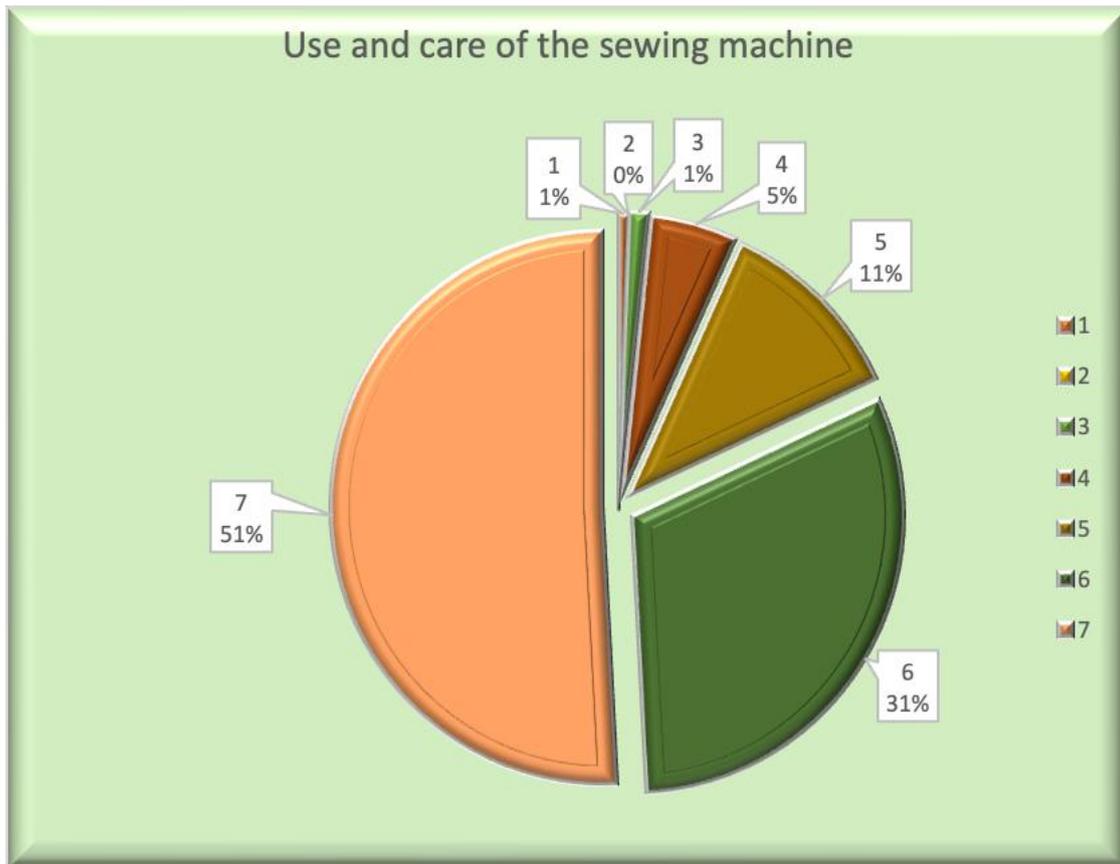


Figure 6: Skills to use and care for the sewing machine

Figure 6 specifies the extent to which participants are skilled in the appropriate use and care of the sewing machine with 7 being the highest level of skill and 1 the lowest. A sum of 51% of the participants achieved the highest level of skill satisfaction for the use and care of the sewing machine, this is encouraging since every machinist must know how to operate the sewing machine and do basic care. According to Scott, (1961) <sup>[13]</sup> a sewing machine can last long and the owner get more from it when it is taken good care of. Proper operation of the sewing machine will also curb the physical discomfort resulting from poor posture when working for extensive periods of time (Sakthi Nagaraj, and Jeyapaul, 2018) <sup>[14]</sup>.

### 3.12 Basic Business Skills

Only the basic business skills such as marketing, management of money and other resources, communication, market retention, costing and sourcing were assessed. These were selected for purposes of this study. In an earlier study, Kunene (2009) <sup>[15]</sup> discovered that the most important business/entrepreneurial skills for functionality in the textile industry ability to gather resources, marketing, motivation, legal, financial and operational management skills. In agreement to the value of the previously stated business skills, Ezeoguine, (2014) <sup>[16]</sup> emphasised the importance of financial management skill as it enables potential entrepreneurs to make financial plans to raise money for their business, purchase tools and equipment, among other activities requiring capital.



Figure 7: Business skills

The series in Figure 7 ranging from 1 to 7 indicate the extent to which a skill is satisfactory with 7 being the highest level and 1 the lowest. From the findings in Figure 7, it is apparent that the ability to gather resources, marshal and manage finances are relatively low and that can be detrimental to the business. Hodges et. al., (2016) <sup>[17]</sup> identified the critical factors factor for success in apparel related enterprises to include relationship-building, niche identification, resourcefulness, community engagement, and global awareness. They continued to suggest that entrepreneurship and small-business-related education within apparel programmes should focus on developing students' entrepreneurial competency relative to these factors. Lesotho MSMEs in the textile and apparel industry need to be capacitated more in these areas.

### 3.13 Fervour for the textiles and apparel industry

High levels of interest and motivation in the industry and business are foundational attributes for accomplishment of successful functionality within the textiles and apparel industry (Kunene, 2009) <sup>[15]</sup>.

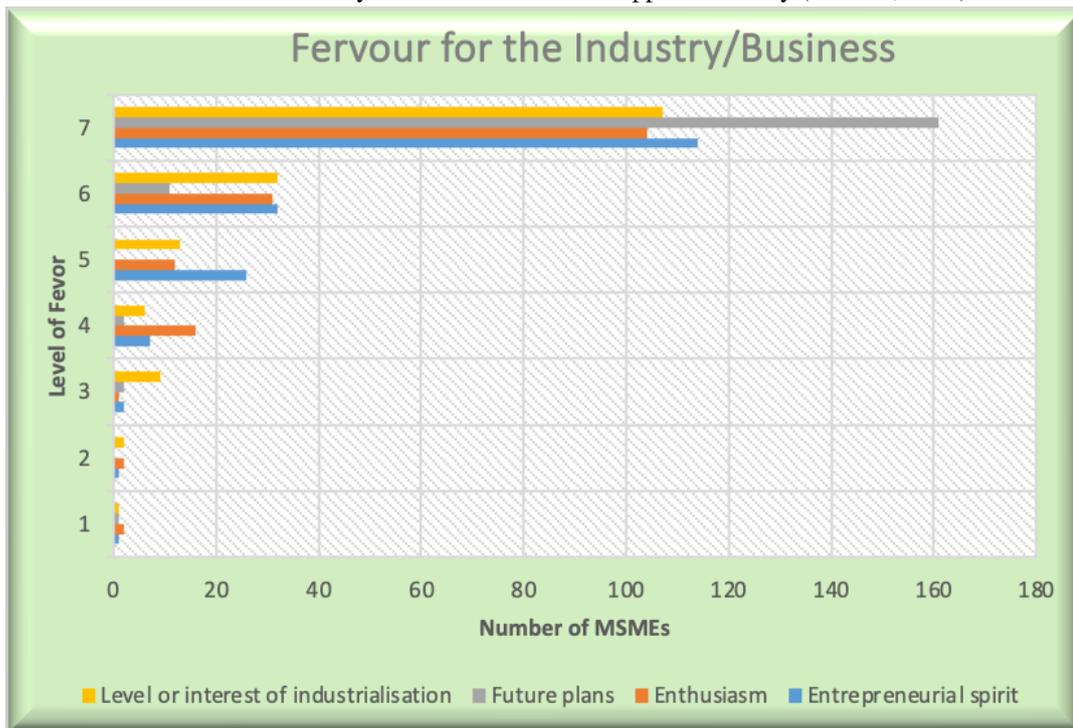


Figure 8: Fervour for the Industry

The findings in Figure 8, are indicative that the MSMEs are highly motivated to operate in the industry and more so to scale up through industrialization. This concept of fervour in general stood out soaring as high as 161 out of 185 (87%) MSMEs indicated the highest level of interest in growing the business in the future with a special interest in industrialization. Previous researchers identified motivation as essential for success in the industry (Kunene 2009<sup>[15]</sup>, Ezeoguine, 2014<sup>[16]</sup> and Hodges et. al., 2016)<sup>[17]</sup>.

### **3.14 Highlights from the Observations**

The observations conducted during the skills assessment involved evaluation of the products made by each of the 185 MSMEs, the outcome of this exercise revealed that some participants are highly skilled while other have average to low levels of skills. All of these participants are still players in the industry, interestingly there are some consumers who buy from the respondents of this study out of loyalty while others buy quality and the latter are avoided by the MSMEs with low skills, the challenge of depending on loyalty is that it can be outgrown. Suffice it to say that production of quality products and intensive marketing will potentially improve sales as opposed to the dependency on the mercy/pity/support from the loyal customers. It was also observed that sometimes income is difficult to generate when one is waiting for “potential clients” who are unknown and may not show up in the end.

### **3.14 Reasons for Joining the industry**

The outstanding reasons identified as driving force for the responding MSMEs to join the textile and apparel industry include business whose interest was inherited from family, means of income generation, passion for fashion/textiles, attempt to alleviate poverty and the last resort for a career. It is inevitable therefore to have players at varying levels of motivation in the industry expected by circumstances to function at par with each other, these disparities of objectives for joining is likely to play a notable part in the differences in fervour on the part of the MSMEs within the industry.

## **IV. CONCLUSION**

This baseline assessment offers a foundational lens into the production and business capabilities of MSMEs in Lesotho’s textile and apparel sector, providing actionable insights for clustering, industrialization, and export readiness. One of the key advantages of this study lies in its participatory diagnostic approach, which not only captures technical skill levels but also reveals entrepreneurial motivation and systemic gaps. The clustering model proposed—based on skill tiers and equipment sufficiency—serves as a practical framework for targeted interventions, enabling policymakers and development partners to allocate resources efficiently and inclusively.

However, the study is not without limitations. Its geographic scope was confined to Maseru due to logistical constraints, and while snowball sampling expanded reach, it may have introduced selection bias. Furthermore, the assessment focused primarily on observable skills and self-reported data, which may not fully capture latent capabilities or informal networks that influence MSME performance.

Despite these constraints, the findings have broad applications. They can inform curriculum development for vocational training, guide donor-funded industrial upgrading programs, and support the design of centralized services such as cutting centres and quality assurance hubs. Future extensions could include digital skills mapping, longitudinal tracking of MSME growth, and comparative studies across SADC countries to benchmark regional competitiveness. Ultimately, this work lays the groundwork for a more inclusive, skills-driven transformation of Lesotho’s textile economy

## **V. ACKNOWLEDGEMENTS**

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Together, these contributions have made it possible to generate a meaningful and actionable framework for clustering and capacity building in Lesotho’s textile and apparel sector.

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