

**A Study on the Effective Way of Supplying of Highly
Educated Fashion Specialists
-Focusing on the Korean Apparel Manufacturers in Dalian, China-**

Soo-Jeong Bae[†]

Dept. of Clothing & Textiles, Chonnam National University, Human Ecology Research Institute

**패션 전문가의 성공적인 중국 진출에 관한 연구
-중국 대련의 의류제조업체를 중심으로-**

배 수 정[†]

전남대학교 의류학과, 생활과학연구소

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Abstract

The purpose of this thesis is to find the effective way of practical education in the fashion related department in order to supply the appropriate experts to the Korean apparel manufacturers located in Dalian, China. The interviews were made twice from 25th of Feb. to 15th of Mar. 2005 and from 28th of July to 31st of July 2005 through the method of a direct interview with the CEOs of the 7 representative apparel manufacturers. The results of the interviews were as following. Seven companies(100%) participated in the survey all complained of insufficient workers. Also the companies were having difficulties at finding appropriate workers who can handle designing, management, and circulation, because specialists who are fluent in Korean and Chinese are very rare. Moreover, Korean apparel manufacturers are now taking a step further to launch a high quality fashion brand, getting out of the simple hand work depending on low wage or low-tech(6 companies 85.7%). Thus, well-educated fashion specialists(intermediate manager) are required on the part of Korean clothing companies or apparel manufacturers in China. It is expected the intermediate managers and the specialists who are capable of launching a new brand will be urgently needed. Therefore, appropriate educations in Korea would be essential to minimize the problems the Korean fashion specialists might face in China. I would like to present three suggestions. 1. The highly educated Korean fashion specialists on apparel industry will be a solution both to the high jobless status in our country and to the deficiency in human resources of Korean apparel manufacturers in Dalian. 2. The students in the college should learn how to write down the working chart and matching chart in practical conditions. Taking an intern-ship in working factories in China during a certain period of time will be helpful. 3. The experts should be trained with emphasis on the quality, design, and value of the brand. This study will be used as a base for Koreans who work in fashion related department to enter the Chinese fashion market having a great potential.

Key words: Fashion specialist, Apparel manufacturer, Brand launching; 패션 전문가, 의류제조업체, 브랜드 설립

[†]Corresponding author

E-mail: sjbae@chonnam.ac.kr

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I. Introduction

According to the research done by Korean Federation of Textile Industries on December, 2004, the capital flowing to the Chinese fashion market is approximately 35 billion Chinese Yuan corresponding to Korean currency of 44 billion Won(Korea Federation of Textile Industries, 2004). The scale of Chinese fashion market is now four times greater than that of Korean fashion market, and their future as a market located in a developing country will get more promising with upcoming international events such as 2008 Beijing Olympic and 2010 Shanghai Expo (“The scale of Chinese fashion market”, 2005).

Among many cases of foreign investment to China, there have been at least about 1,811 cases of investment from Korea until November 2004, and the capital is estimated to be 1066 million US dollars (Jo Hyun June, 2005). Especially 425 cases of investment on the northeast 3-sung(Liaoning, Jilin, Heilongjiang) take up 23.5% of total investment to China, with the fund reaches up to 13 billion Korean Won, which is 12.7% of total investment. The amount is the second largest after Shangdong Peninsular, indicating that Korean companies have suc-

cessfully created a positive image of Korean products in northeast 3-sung. Also, many Chosunzogs are residing in those areas, thus northeast 3-sung have strong ties to Korea on historical and geographical perspective. In northeast 3-sung, lots of Korean enterprises have already started, encouraged by the cheerful environment, and many of the entries brought a great success(KOTRA, 2004).

Dalian located in Liaoning-sung in China, has the greatest potential on economic perspective among North East 3-sung. As the other fourteen sea-sided Economic & Technology Development Cities(Fig. 1). Dalian is doing all it’s best for making it acceptable to the foreign investment. It is ranked third in China for its hospitability to foreign investment, reported by Forbes China(“The rank of favorable cities”, 2004). At present, Dalian and Ningbo are the biggest apparel manufacturing cities in China(“Merchant of ningbo”, 2005). In these days, Dalian has strong image of fashion, soccer, travel and environment, and it is also taking the wonderful stride in clothing industry, the Dalian International Garment Fair & China Garment Export Fair being the turning point. Korean companies played a key role, with 160 apparel manufacturers working in the city. Those companies are known



Fig. 1. The location of Dalian(www.mapquest.com)

to excel over the Chinese companies in both quality and productivity("Confidence Returned", 2004).

However, according to the research done by Korean Institute for International Economic Policy(Cho, 2005), 66-69% of the Korean textile and apparel manufacturers in China have been reported their suffering from shortage of human resources. It has also reported that the majority of the manufacturers will face difficulties more seriously in the future. The wages seem to be rising rapidly, but the problem of shortage of human resources is yet to be solved. Therefore, I believe that the fashion specialists who get education in Korea should enter the job market in China.

Prior to the study mentioned above, there were many studies related to Chinese fashion market; the various studies are dealing with preference of clothing, on street style(Kim, 2000; Kim & Park, 2004; Park, 2004; Wang & Kim, 2005), clothing fitness, physical measurement(Im, et al., 2003; Im & Seok, 2004; Shim & Kwon, 2003; Shon et al., 2000; Shon, 2005), dressing behavior, marketing strategies(Chang, 2003; Chung & Kang, 2004; Ko & Song, 2004; Lee, 2004; Lee et al., 2002; Shon et al., 2003; Yu, 1998), and so on. However, no study dealing with supplying human resources, which will be very useful for Korean manufacturers in China, was ever found.

Thus, the purpose of this thesis is to find the effective way of practical education in the fashion related department in order to supply the appropriate experts to the Korean apparel manufacturers located in Dalian, China. This study will be used as a basis for Koreans who work in fashion related department to enter the Chinese fashion market of a great potential.

II. Literature Review

1. Characteristics of China Fashion Market

Political factor leads China to a trend of centralization toward Beijing; however, centrifugal tendencies have increased on economic perspective. Many areas in China have been through the critical changes due to development. Northeast 3-sung, Beijing-Tianjin area, Shandong-sung, Chang River Delta, Fuzien-sung, Xi River Delta are six areas located on East China Sea-

side where the critical changes and development led them to an economic independence. Such regions are called 6-mega regions. According to Kenichi Ohmae who first found the term, mega regions are economically independent regions classified according to their culture, history, and language. Therefore, to gain a success at Chinese market in general, planning the business depending on the different regions would be necessary.

The regional distinctiveness also carries its importance to Chinese fashion market. The significance could be found in the researches done by Eunju Ko, Yunah Song(Ko & Song, 2004) and Sum(Sum, 1997), which investigated the market's regional tendency on consumption level and clothing preference. According to their study, southern area shows high consumption level and tendency to follow Hong-Kong style. Eastern and northern areas give high values to beauty, nobleness and brand-named products. In northeastern area, a similar consumption pattern is found throughout the region, and Korean and Japanese styles are preferred. In southwestern area, which is a low-middle range price market, the clothing style is mainly affected by Shanghai.

China's multiracial aspect in its population constitution leads not only to the difference in clothing style, but also in bodily form. An article by Fashionbiz investigated the fitness of Korean clothing in China. It has mentioned Korean clothing could be easily fit to southeastern area people who have similar bodily form to that of Koreans. On the other hands, the demand on Korean clothing in Shanghai area could not easily meet its satisfaction due to people's longer legs. Han race in Shangdong Peninsular and northeastern area has a bigger body, and people's larger chest and shoulder usually do not allow them to wear Korean clothing("Korean clothing in China", 2000). What has mentioned in the article overlaps with the results of preceding analysis on Chinese women's bodily form and its size measurement, and it stresses the importance of fractionalized market approach on entering Chinese fashion market.

Northeast 3-sung attracts Korean fashion market with its geographical and historical advantages, which naturally leads to a dogfight with Japanese fashion

market to win the area. Historically, Northeast 3-sung which is a former territory of Goguryeo, has lots of Korean immigrants from World War II who are called Chosunzong. Their presence brings intimacy to Koreans, and the fellowship aroused from World War II left the residents with a positive image of Koreans (KOTRA, 2004). The distance is another great advantage; it only takes one hour by flight and sixteen hours by ship from Korea. The harbor located inside the city makes it easier and cheaper to transport products from Korea. It is very likely that fashion related companies in Korea will eager to enter the fashion market in this area, thus appropriate fashion specialists would be highly demanding. In general, it is known that the companies managed by Koreans are superior to the other companies run by Chinese in productivity and quality of the product ("China fashion market", 2004). Therefore, the Korean managed companies have more possibility of gaining a

success.

As the Korean products are loved by leading Beijing consumers in their thirties, the outlook of Korean fashion industry is quite favorable at present ("China fashion market", 2004)(Fig. 2). Fashion related products are attracting Chinese consumers above all other kinds of product, thus it is very likely that preferred designs of clothing would bring a success in the Chinese fashion market. Chinese consumers are valuing Korean fashion products as high as French products(Fig. 3). Koreans are now orienting high quality products to satisfy Chinese consumers, thus more Korean fashion specialists would be demanding in near future.

2. Present Condition of Korean Apparel Manufacturers in Dalian

Most apparels in China are supplied in the fourteen major apparel producing areas of Liaoning-sung, Hebei-sung, Beijing, Tianjin, Shangdong-sung, Jiangsu-sung, Shanghai, Zhejiang-sung, Fujiang-sung, Guangdong-sung, Guangxi-sung, Hunan-sung, Hubei-sung, and Yuannan-sung. At present, about 97 percents of the national apparels are produced in those areas. Dalian especially, which is the center of Liaoning-sung district, presents a positive outlook for female apparel market, ten times greater than that of male. Thus Korean firms in Dalian are producing considerable amount of goods despite of their relatively small number(160 companies). The OEM introduced from Korea allows the firms to have an optimistic outlook in Dalian as well. It allows firm to obtain lower distributional expenses and less time of production. When it combined with Dalian's Korea-and-Japan-following trend, Korean firms could attain a step ahead in launching a new brand in Dalian.

In a view of company scale, they could be categorized into three levels of large, medium and small. In general, the large company is composed of 500 to 600 employers, having more than 10 production lines. The company is capable of producing apparels 1,500 pieces per day. They generally receive orders from Korea, only a little from Japan. Some Korean companies accept orders from China itself by estab-

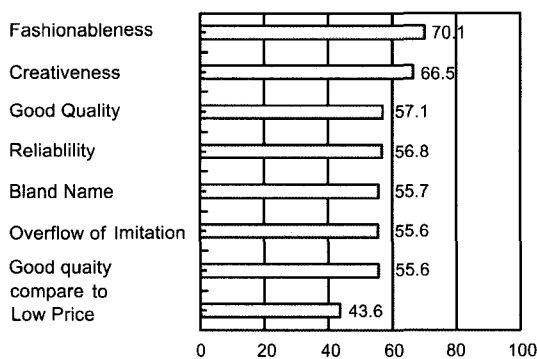


Fig. 2. Evaluation of Korean fashion products in Beijing, China 2004("China fashion market", 2004)

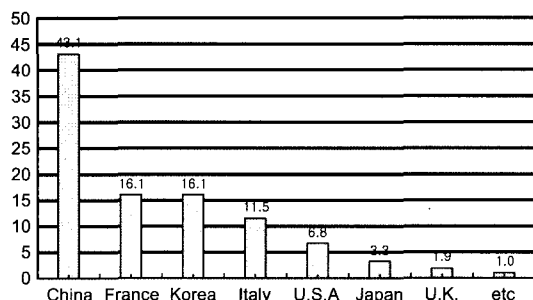


Fig. 3. The rank of favorable country for fashion commodities in Beijing, China("China fashion market", 2004)

lishing Chinese corporation in the corresponding region. The medium one is consisted of 300 to 400 employers, 7 to 8 production lines, about making apparel 1,000 pieces per day. The small one is consisted of 100 to 200 employers, 3 to 4 production lines, about making apparel 500-600 pieces per day. Most of them were established in the form of the limited companies similar to the corporation company in South Korea.

III. Method

The interviews were made twice from 25th of Feb. to 15th of Mar. 2005 and from 28th of July to 31st of July 2005 through the method of a direct interview with the CEOs of the 7 representative apparel manufacturers(except the clothing companies, which have the shops in China). In some cases, Internet and e-mail were used additionally to avoid any ambiguities between interviewers and interviewees. Also related books, articles, survey report, Internet website, and periodicals were used for this study.

The main contents of the interviews are about how human resources could be supplied on the part of Korean apparel manufacturers in Dalian. The list of the details is as follows;

1. Scale of company

- Type of company - Limited company(stock company) and etc
- Type of business - design, manufacturing, and distribution
- Major trading countries - Domestic(China), Korea, Japan, and etc
- Number of clothing production per day

· Number of employees

2. Possible problems of management(supplying human resources, raising wages, and relationship between employers and employees, and etc)
3. Estimated number of demanding human resources at present and in the future
4. Further planning for management - brand launching, growth of brand(China and Korea), and extension of distribution

IV. Results & Suggestions

1. Present Situation of Human Resources in Dalian

The following <Table 1> is indicating the type and the scale of the companies participated in the survey.

In seven companies where the workers were employed through interview, the 98 to 99 percents of employees were Chinese beginners. For instance, company E, the company of a large scale, hired 7 Korean and 643 Chinese employees. The Chinese beginners were taken into their station after being trained for few months. The training was mainly assisted in each part by Korean experts who have more than 10 years of working experience. However, Korean experts cannot communicate without a translator, who is Chosunzog in many cases, because they usually can't speak Chinese. In Company B, president was the only Korean working in the company. As a company mainly exporting to Japan, it has wanted to hire specialists who can speak both Chinese and Japanese but found it very difficult.

The payment to the workers in Dalian is depending

Table 1. The scale of the seven companies interviewed

Company name	Type of Business	No. of Employees	Productivity/day	No. of Production Line
A	Limited Company	1000	2500	19
B	"	800	2000 pcs	14
C	"	700	1500-1800 pcs	12
D	"	200	500-600 pcs	5
E	"	650	1500-1600 pcs	11
F	"	180	400-500 pcs	4
G	"	400	1000 pcs	10

on the type of job. Each company has to register their payment system with Economic Development District Human Power Office under the slogan of the similar jobs should be paid the same. In China, the wages of the unskilled workers are approximately 50 to 80 dollars per month. The wages for managers and high positioned managers are 100 to 200 dollars and 300 to 600 dollars a month respectively. On the other hand, the unskilled workers in the fashion market get paid better with the wage of 100 dollars a month on average. The above values are relevant with the findings through interview by economist Kenichi Ohmae who is author of *China Impact*(Kenichi Ohmae, 2004). The average wage, 100-150 dollars per month, is still much lower than in Korea, but increased 3 times since 10 years from now. This means that Chinese fashion market would be a favorable chance of overseas employment to the Koreans in the near future. Nonetheless, the seven companies that were interviewed were all facing the problem of insufficient workers(7 companies 100%). The Chinese workers are mostly unskilled, thus Korean workers who are mainly specialists are needed at present(5 companies 71.4%). Due to the difference in language and culture, Korean workers tend to have more difficulties in China. On the other hand, Chosunzong who does not have those difficulties occasionally moves to the bigger cities where the quality of life is better. Therefore, the problem of insufficient human resources would not be resolved in short run.

2. Problem of Supplying Human Resources

Comparatively higher wages apparel-manufacturing companies offer to the workers do not seem to attract more workers. Like Koreans, many Chinese people regard apparel manufacturing as 3D, causing it more difficult for the manufacturers to hire appropriate workers. Seven companies(100%) participated in the survey all complained their stressful situation of insufficient workers. Moreover, two out of seven companies were unable to operate some production lines due to lack of skilled tailors to work on. Also the companies were having difficulties at finding appropriate workers who can handle designing, man-

agement, and circulation, because specialists who are fluent in Korean and Chinese are very rare.

In case of hiring Korean specialists, the language problem is a major obstacle to the effective management, which most Korean specialists are facing at present. There are not enough translators, because Chosunzogs who are bi-lingual tend to transfer to the larger cities for more payments, after technically equipped in Dalian. The cultural collision is also an important problem to consider, but as significant as language problem. The secondary obstacle comes from difference in currency between China and Korea. The value of Yuan is much lower than value of Won, thus the problem might occur during payment to Korean workers. Currently, Chinese managers get paid 400 to 500 \$(relatively high wage in China), while Korean managers get more than four times higher wage of 2000 to 3000 \$ per month. Regardless of the exceedingly higher wages the apparel manufacturers have to pay, they prefer the Korean specialists whose working abilities are known to surpass Chinese specialists.

Difference in value of currency between two countries is now making it hard for Korean specialists to enter Chinese fashion market. However, the value of Yuan is rising at a considerable rate, reducing those gaps. To prepare for near future, appropriately educating students who will enter Chinese fashion market as fashion specialists is necessary.

Insufficient workers would affect other businesses as well, eventually leading to economy of Korea as a whole. The 60 percents of the investment from Korean companies are flowing to foreign nations including China("The future plan for foreign investment", 2005), while most of the companies they are investing are suffering shortage of skilled workers. According to the survey KOTRA trade center of Dalian carried out on January, 2005, 60 percents of the 20 companies in Liaoning-sung have problem of insufficient specialists("Korean companies", 2005).

3. Future Plan of Korean Apparel Manufacturers

Korean apparel manufacturers are now taking a step further to launching a high quality fashion

brand, getting out of the simple hand work depending on low wage or low-tech. Out of seven companies replied to the interview, three of them were planning to launch a fashion brand of a high quality, three of them were planning to expand management and circulation, and the other company was looking forward to do that when appropriate technology and human supply are available(6 companies 85.7%).

Accordingly, the apparel manufacturing companies are looking for the fashion specialists who can undertake designing, management, and circulation, preferring experienced workers(four out of five companies where Korean workers are needed 80%). Both Chinese and Korean apparel companies are showing the trend of launching a high quality brand("The weakness of China", 2003), and the trend is closely related to the change of China's consumption pattern. According to KOTRA publication of China's apparel consumption in 2005, consumption of apparel per person in 2003 was 637 Yuan, which had 30% increased since 1995, while ratio of apparel consumption to consumer's expenditure had decreased from 13.5% in 1995 to 9.79% in 2003. Based on this result it is possible to say that China's consumption pattern moved to quality-based purchase, which puts more weight on brand-name value(KOTRA, 2005). It means that China started to attach a great importance to design in fashion, which is supported by drastic increase in sales of luxury goods investigated by numbers of articles("High quality brand in China"; 2005; "The five trends"; 2005; "The scale of Chinese fashion market", 2005).

In summary, well-educated fashion specialists (intermediate manager) are required on the part of Korean clothing companies or apparel manufacturers in China. It is expected the intermediate managers and the specialists who are capable of launching a new brand will be urgently needed. Therefore, appropriate educations in Korea would be essential to minimize the problems the Korean fashion specialists might face in China. I would like to present three suggestions.

The highly educated Korean fashion specialists on apparel industry will be a solution both to the high jobless status in our country and to the deficiency in

human resources of Korean apparel manufacturers in Dalian. To minimize the problems that might occur, appropriate education will be required. Future Korean fashion specialists would learn how to adapt themselves in Chinese working conditions through the education of practical Chinese, Chinese culture, life style and values including economics. On Economic perspective, the basic study on the trade with learning the practical terms or phrases would be essential prerequisites. They should be included in the regular curriculum or in a double or sub-majors. M. J. Lee, CEO of Baucree Merchandising Co. Ltd, calls it "Global Mind", and "of utmost important"(Lee, 2005).

The students in the college should learn how to write down the working chart and matching chart in practical conditions. Gaining an internship in working factories in China during a certain period of time will be helpful(The Korean industries heartily welcome these propositions). These will make students have a better understanding of the producing process of apparels, making easier for them to apply it to the practical works. Through understanding of the process, students will learn fashion design, trade, and distributions.

The experts should be trained with emphasis on the quality, design, and value of the brand. Additionally, understanding the traits and the differences of consuming behaviors between two countries' fashion market will make them competitive in global fashion world. The development of curriculum like "Fashion brand launching practice" or taking a "Fashion brand launching exhibition" instead of the graduation show, could help student by conducting an education program of intensive training and practical study. As mentioned throughout the paper, this could be achieved by company level support, in addition to the communication between company and our costume association.

The further research on the human resources, which are needed on the part of Korean clothing companies in the various areas of China, will help the fashion related graduates have a better chance of getting job and taking a step ahead in the global world.

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요 약

본 연구는 한국에서 의류 및 패션관련 학과를 졸업한 전문인력들이 앞으로 거대시장으로 성장할 중국 패션시장에 취업할 수 있는 효과적인 방법을 모색한 것이다. 연구의 방법은 한국의 많은 의류제조업체가 진출해 있는 중국 대련시의 7개 의류제조업체 대표자의 직접 면접방식을 사용하였으며, 면접의 기간은 2005년 2월 25일부터 3월 15일까지, 7월 28일부터 31일까지 2회에 걸쳐서 었다. 면접의 결과는 대련시의 상당수 의류제조업체들이 전문인력공급에 직면해 있었고(100%), 특히 비숙련직 노동자보다는 숙련직 및 중간관리자의 인력공급문제가 심각한 것으로 나타났다. 또한 이들은 앞으로 단순 제조방식에서 탈피하여 부가가치가 높은 분야로 진출·의류브랜드를 설립 혹은 기획 및 유통의 확장하려는 경향을 보이고 있었다(85.7%). 이와 같은 결과는 한국섬유산업연합회 및 KOTRA 등에서 발표한 결과와 유사하여 한국의류제조업체의 60% 이상이 중국에 진출해 있는 현실에서 시급히 해결해야 할 문제라고 보여진다. 따라서 연구의 결과를 종합하여 다음과 같은 제안을 하고자 한다. 첫째는 중국어와 중국경제, 문화에 관한 전반적인 지식습득이 가능한 교과목을 설강하여 문화적인 차이를 인지케 한다. 둘째, 중국으로의 현장실습 및 견학, 인턴쉽 프로그램을 강화한다(면접을 실시한 많은 회사들이 협조에 동의함). 셋째, 많은 의류제조업체들이 의류브랜드 런칭 및 기획, 유통분야를 강화하고자 하는 계획을 갖고 있으므로 브랜드 런칭에 관한 교육을 심화하여 변화하는 중국패션시장에 적용케 한다. 이러한 연구는 앞으로 한국의 패션전문인력이 진출할 수 있는 거대한 중국취업시장 진입을 위한 토대로 활용될 것으로 기대된다.