Strategic Plan

Consultancy for the Development of a Strategic Plan for the Fashion industry of Trinidad and Tobago

TTCSI
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Table of Contents

Table of Figures

Table of Tables

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Abbreviations

Abbreviation	Long Title
CSO	Central Statistical Office of Trinidad and Tobago
CSR	Corporate Social Responsibility
DUS	Designer United Stores
ECCL	Export Centres Company Limited
EPZ	Export Processing Zone
FATT	Fashion Association of Trinidad and Tobago
FETT	Fashion Entrepreneurs of Trinidad and Tobago
FTZ	Free Trade Zone
GDP	Gross Domestic Product
GOTT	Government of Trinidad and Tobago
ITC	International Trade Centre
JBDC	Jamaica Business Development Corporation
LAM	Latin America
MIC	Metal Industries Company
MTIIC	Ministry of Trade, Industry, Investment and Communications
NIHERST	National Institute for Higher Education, Research, Science and Technology
OJT	On-the-job-Training
SWOT	Strengths, Weaknesses, Opportunities and Threats
TT	Trinidad and Tobago
TTD	Trinidad and Tobago Dollar
TTCSI	Trinidad and Tobago Coalition of Services Industries
UNCTAD	United Nations Conference on Trade and Development
USD	United States Dollar
UTT	University of Trinidad and Tobago
UWI	University of the West Indies
YTEPP	Youth Training and Employment Partnership Programme

EXECUTIVE SUMMARY

The Fashion Industry is a sub-sector of the Creative Industries which the Government of Trinidad and Tobago has chosen for development toward the diversification thrust. This Strategic Plan for the Fashion Industry of Trinidad and Tobago represents the culmination of extensive work conducted in 2014 which focused on analyzing the sector and identifying cost effective interventions to maximize market growth, exports, and vitality of the industry and its impact on the overall economy of Trinidad and Tobago.

The plan outlines a bold new strategic direction and the strategic initiatives that will be undertaken during the period 2015 – 2020. The Strategy is focused on creating differentiation through the integration of new external elements with elements presently found in the local industry and contains three interdependent and one enabling factor(s):

i. *Differentiated support for and investment in the three fashion sub-sectors (as defined in this plan)*
ii. *Branding for visibility that spans all three sectors but where the focus is on Fashion Apparel and Accessories internationally (and local awareness)*
iii. *Support for firms and associations*
iv. *Effective good governance of the sector (key enabling feature)*

The new strategy provides the greatest opportunity for the Fashion Industry to address the current decline in competitiveness, strengthen the capacity of players to participate in the international market and increase growth and revenue at the national and firm levels. It is designed to build the elements outlined above and focuses on:

1. **The transformation of the Fashion Value Chain (Global and Local)**
2. **The development of the industry through six (6) programmatic areas:**
    a. *P1A: Improve Market Access*
    b. *P1B: Innovate Organizations and Operations*
    c. *P2: Assure Sector Coordination and Support*
    d. *P3: Well governed Strategic Investments*
    e. *P4: Institute an Industry Intelligence and Innovation Function*
    f. *P5: Actively Manage the Industry Strategy and Governance Process Policy*
3. **The alignment of the Strategy against pre-defined Criteria**

Throughout the execution of this new strategy, Trinidad and Tobago will be seen or viewed as a fashion hub on the basis of an aligned Fashion Industry where development of the sectors and support organizations and events are coordinated in systematic way. The end results that will be achieved are increased foreign exchange and an increase in sustainable and meaningful employment.

The Strategic Plan is organized in the following manner.

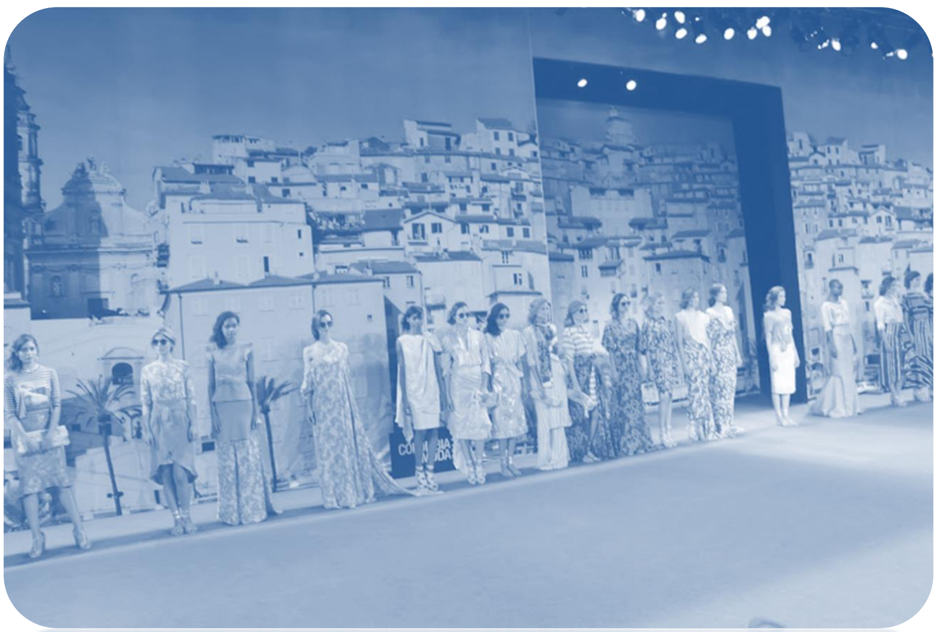
➔ **Chapter 1: Introduction** provides the context within which the strategic plan was developed and explains the intended purpose and scope of the plan as well as an overview of the process used to develop the Strategic Plan.

- **Chapter 2: Situational Analysis** introduces the Viable Systems Model which was utilized to assess the current state and viability of the Fashion Industry. The assessment was conducted through an in-depth review of the local Fashion Industry within an international context in order to identify the industry's strengths, weaknesses, opportunities and threats. The analysis highlighted the decline in competiveness at the national, industry and firm levels as the key challenges faced by the Fashion Industry.
- **Chapter 3: Strategic Options** provides an analysis of the three (3) strategic choices and five (5) strategic possibilities for increasing the competitiveness of the Fashion Industry:
  - *Choice 1: Strengthen the existing approach*
    - <u>Possibility 1</u>: Nurture and incubate individual firms equally
  - *Choice 2: Create a unique collective brand*
    - <u>Possibility 2</u>: Develop Trinidad and Tobago as a differentiated and unique brand for fashion
    - <u>Possibility 3</u>: Create a unique Caribbean brand (that is, subsume the Trinidad and Tobago brand within a wider Caribbean brand)
  - *Choice 3:Success based on individual differentiation*
    - Possibility 4: Integrate new external (regional and hemispheric) elements
    - Possibility 5: New Trinidad and Tobago integration of the talents and industries in Trinidad and Tobago so as to create a unique full value chain.

  The selected strategy, Possibility 4 – Integration of New External Elements, which speaks to the creation of differentiation by combining external elements with the elements of the local industry, is also presented.
- **Chapter 4: Strategic Plan** provides the core of the Fashion Industry strategic plan as outlined at the beginning the Executive Summary and identifies in great detail the strategic agenda for the Fashion Industry for the period 2015-2020. Details of each of the six (6) Strategic Programmes along with estimated annual investment, critical success factors, opportunities for scaling up/down and a proposed monitoring and evaluation process for each project within each programme are also provided.
- **Chapter 5: Quick Wins** presents several 'quick-wins' - initiatives that can be implemented in the short term and which have visible and immediate results/ benefits.
- **Chapter 6: Critical Success Factors** build on the individual success factors identified for each of the programmatic projects and presents other elements necessary for the Trinidad and Tobago Fashion Industry Strategic Plan to be successful
- **Chapter 7: Action Plan** outlines the mechanisms for implementing the Plan and is followed by a consolidated implementation plan in Appendix 1.

Chapter 1

Introduction



CHAPTER 1- Introduction

1.1 Context

The global Fashion Industry is a highly dynamic sector with the global apparel market estimated at US$1.7 trillion in 2012 and providing employment for approximately 75 million people worldwide[1]. It is expected that the global apparel market will grow to or surpass US$2 trillion by 2025[2]. Growth in the developed markets is currently slowing down however and it is expected that emerging economies, such as Trinidad and Tobago, will fuel most of the growth in the global fashion market[3].

The Government of the Republic of Trinidad and Tobago (GORTT) has noted these trends and has identified the **Fashion Industry of Trinidad and Tobago as a priority sub-sector for development under the Creative Industries. This is in keeping with the Government's intention to create a more diversified, knowledge intensive economy –** ***building on the native genius of our people*****[4].**

In light of the above, the Ministry of Trade, Investment, Industry and Communications (MTIIC), commissioned a project in 2014 aimed at developing a Strategic Plan for the Fashion Industry of Trinidad and Tobago.

Managed by the Trinidad and Tobago Coalition of Services Industries (TTCSI), the project focused on an analysis of the local Fashion Industry within the international context with the intention of determining the economic potential of the Fashion Industry inclusive of: *Job creation and employment; Revenue generation; Contribution to diversification; Business opportunities; Export potential; and Knowledge transfer*.

1.2 Purpose

This Strategic Plan is the product of extensive primary and secondary research including data collection and analyses, stakeholder consultation and a literature review. It sets a bold new strategic direction aimed at improving the conditions of the local Fashion Industry as well as increasing its competitive advantage in the international level.

It represents the first comprehensive study completed for the Trinidad and Tobago Fashion Industry and provides:

- ➔ A critical review of the local Fashion Industry within the international context

1 An Article titled, "Global fashion industry statistics - International apparel" by fashionunited.com, undated, at: http://www.fashionunited.com/global-fashion-industry-statistics-international-apparel
2 An Article titled, "Apparel Market worth…" by just-style.com, dated July 2013, at: http:// www.just-style.com/news/apparel-market-worth-us2-trillion-by-2025_id118510.aspx
3 An Article titled, "Changing Dynamics of Global Apparel Trends" by technopak.com, dated October 2011, at: http://www.technopak.com/files/Changing_Dynamics_of_Global_Apparel_Trends.pdf
4 Pillar five (5) of the Government of Trinidad and Tobago's (GOTT) Medium-Term Policy Framework 2011 – 2014

- ➔ An outline of the overall strategy approach and the strategic direction to support the development and viability of the industry.
- ➔ A number of key growth drivers to be implemented to capitalize on the financial opportunities available within the Global Fashion Industry.

1.3 The Strategic Planning Process

This Strategic Plan was developed using a systematic process, designed to achieve alignment and engagement of the Trinidad and Tobago Fashion Industry around a five (5) year strategy. The strategic planning process of the project sought to answer five (5) questions:

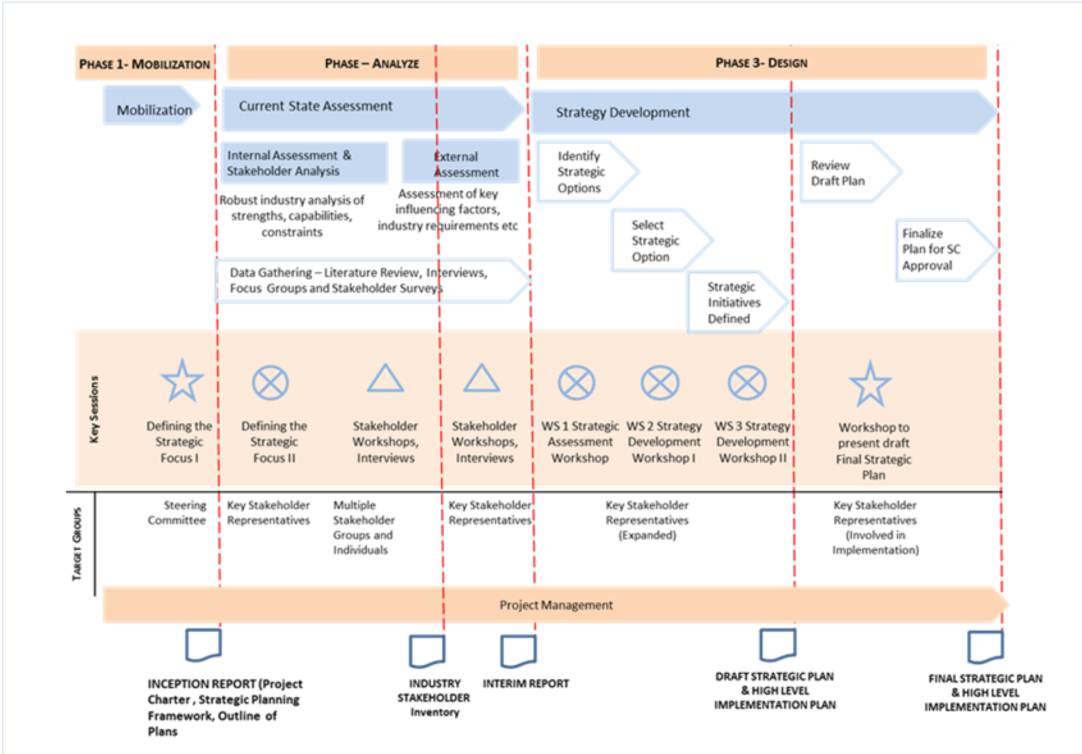
1. **Where are we now**? - Current State: Internal and External Assessment
2. **How will the environment change**? – Internal and External Assessment
3. **Where do we want to be**? – Future Desired State: Outcomes and Goals
4. **How will we close the gap**? - Objectives, Strategies and Initiatives
5. **How will we monitor our progress**? - Measures and Targets

The strategic planning process examined:

- ➔ *the industry, sectors, and key players within its wider context;*
- ➔ *the sectors and sample organizations both from the perspectives of internal activities as well as external dynamics and interaction;*
- ➔ *a range of broad strategic options or thrusts which were evaluated so as to determine the most promising one;*
- ➔ *the initiatives within the chosen strategic path and developed these in greater detail*

The process was organized into three phases: **Phase 1 – Mobilization:** Mobilization and Project Planning; **Phase 2 – Analysis:** Current state and Viability analysis and; **Phase 3 – Design:** Developing Strategy and Planning for Execution.

Figure 1: Illustration of Project Approach



It is important to note that no prior study determined the viability of the Fashion Industry in Trinidad and Tobago. Thus, significant emphasis was placed on the acquisition of primary and secondary data through the active engagement of industry stakeholders to be used for the analysis of the Fashion Industry of Trinidad and Tobago. This included:

- ➔ An analysis of the industry at the national industry, sector, and firm levels;
- ➔ The execution of a comprehensive literature review which included an analysis of international, regional and local reports and industry-relevant materials;
- ➔ Direct stakeholder engagement activities including meetings with the Consultative Group, conducting semi-structured interviews and the use of an online survey.

A Consultative Group was formed and engaged to provide guidance and support toward the development of the Strategic Plan. The Consultative Group was composed of stakeholder institutions only, and the representatives of same were nominated by the respective institutions. Key individuals with industry knowledge or specific expertise, who were not members of the Consultative Group or were not members of the participating institutions, were included in the stakeholder interviews.

Throughout the strategic planning process, a great diversity of persons and companies were engaged in workshops and interviews. Inclusion and diversity were emphasized so as to ensure that not only those who were perceived as the most successful were included.

The strategic planning process included an in-depth literature review at three levels:

1. **International**: Examination of select international regions/countries – United States of America (USA), European Union (EU), United Kingdom (UK), Asia and Latin America
2. **Regional**: Examination of industry literature for the Caribbean region
3. **National**: Examination of data and reports specific to Trinidad and Tobago

Data was also obtained through the stakeholder engagement initiatives held during the course of this project, including:

- ➔ Five (5) Consultative Group meetings
- ➔ One (1) Strategic Focus Group session
- ➔ Two (2) National Stakeholder Consultation sessions
- ➔ Thirty-seven (37) Local and International Stakeholder Interviews
- ➔ One hundred and Thirty-Five (135) Data and Survey respondents

Further information of these direct stakeholder engagements are presented in Appendix 2. However, the full details of data collected and the literature analyzed can be found in the following reports which were presented earlier as part of this process:

Report Title	Date	Appendix Reference
1. Draft Strategic Plan	February 11, 2015	15
2. Final Stakeholder Data Sheet	March 10th 2015	16
3. Project Interim Report	July 31, 2014	17
4. Stakeholder Data Report	July 28, 2014 (updated)	18
5. Inception Report	July 21, 2014 (updated)	19

This final report presents summary conclusions and key insights only.

1.4 Strategic Planning Project Limitations

The primary limitation in the development of the Strategic Plan was the scarcity of quantitative and longitudinal data. Comparative analysis and analysis of historical developments are therefore limited, even though garment manufacturing in Trinidad and Tobago has enjoyed a fairly long existence. Data collection was hindered primarily by:

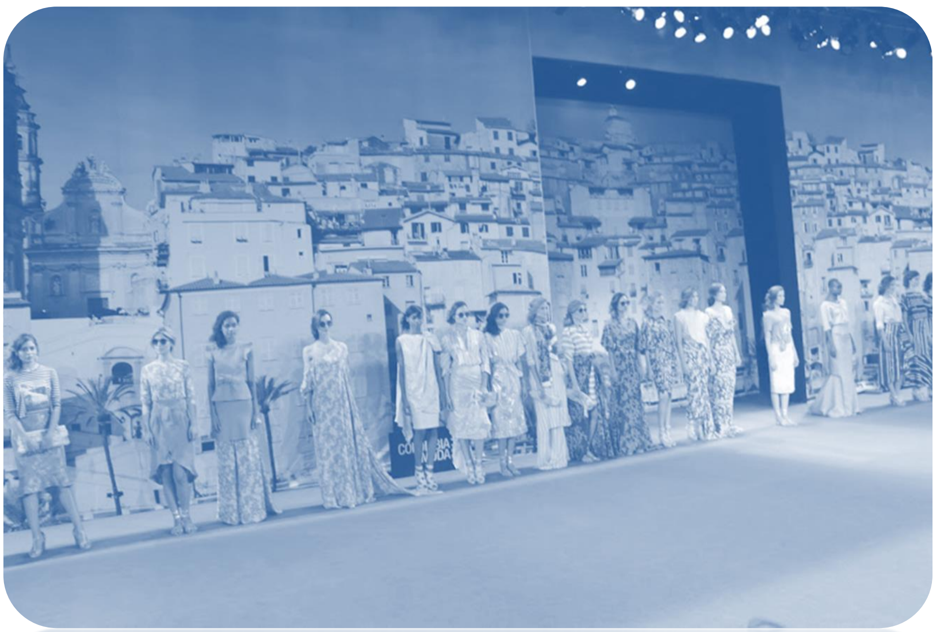
- ➔ **Limited or no base data/Incorrect contact information**
    - Many of the telephone numbers and email addresses provided by the MTIIC, TTCSI and the TTBS were out of order or people simply did not answer. This resulted in having to source

these numbers elsewhere, primarily from other fashion professionals, through Facebook, etc. which proved to be extremely time-consuming.

- **Unavailability of Respondents**
  - In several instances there were people who were not available during the day and gave a particular time for them to be reached, but failed to answer afterwards. These people were emailed the survey and in many cases, the consultant personally called them to follow up.
- **Unwillingness by several stakeholders to participate in the process due to their disengagement, disconnection and perceived fragmentation of the industry.**
  - Three (3) designers categorically refused to participate in the process. They cited disenchantment as the primary reason for their refusal. They further explained that several similar activities were conducted previously and bore no real/tangible results. Another fabric supplier asked to be emailed as it was 'too invasive' to respond to such questions over the phone. The online link was emailed but no response has been received to date.
- **Non-Operational entities.**
  - A few of the recent fashion design graduates have not started labels of their own and are not currently active. They were unable to articulate what they were doing currently, so their information was not included in the final analysis. Additionally, several persons were retired and opted to not provide information.

Chapter 2

Situational Analysis



CHAPTER 2- Situational Analysis - Is the Fashion Industry currently a viable industry?

The focus of this strategy is the Fashion Industry of Trinidad and Tobago as a whole, its sectors, and the firms that constitute the sectors. The GOTT has identified the Fashion Industry as a priority sector in its drive for economic diversification and this strategic plan seeks to analyze the development of the sector, its current state, and what interventions would be most cost effective to maximize growth, exports, and vitality of the industry and its impact on the overall economy of Trinidad and Tobago.

The framework that connects the current state and the desired future contribution of the industry involves the conditions and processes of viability and competitiveness. The aim is to have an industry in which the firms that make up the sectors, and the sectors that make up the industry, are able to respond dynamically to changes in market conditions and opportunities, and where the linkages and coordination within the industry and between the industry and other related sectors is such that competiveness is maximized, sales, and in particular exports, are growing and the industry is fulfilling its full potential in terms of contribution to national income and meaningful employment.

We will therefore present the situational analysis, building on the full details of the literature review, interviews, data collection, market analysis, sector, firm, and stakeholder analysis presented in previous reports, centered around the starting question for this initiative:

> ***"Is the Fashion Industry of Trinidad and Tobago a viable industry****?"*

To that end, we will start by introducing a framework for defining the conditions of viability, and then examine each of the components in turn – always focusing only on the summary and most pertinent information. This analysis enables us to derive strengths, weaknesses, opportunities, and strengths (SWOT) of the Industry and that forms the basis for the examination of strategic options in the following chapter.

2.1 The Viable Systems Model (VSM) – A Summary Overview

The purpose of this summary overview is to present a definition of viability and to provide a framework for analysis of the Fashion Industry.

The Viable System Model (VSM) is a model of the requisite functions of any system for it to be able to survive within an environment that is changing.[5] For example, a firm can be thought of as a system, and the VSM defines the functions that must be present for it to be able respond, survive and thrive, within a changing market context. The Fashion Industry can also be thought of and analyzed as a system that needs to adapt in order to survive and thrive in a changing fashion market.

[5] Stafford Beer (1972), Brain of the Firm; Allen Lane, The Penguin Press, London, Herder and Herder, USA; Patrick Hoverstadt, (2008), The Fractal Organization: Creating sustainable organizations with the Viable System Model, Wiley, Chichester.

Within the VSM, a viable system is **composed of five interacting subsystems** (referred to as S1 through S5), and these can be mapped onto aspects of organizational, sectorial, or industry structure. These are presented in Figure 2 below.

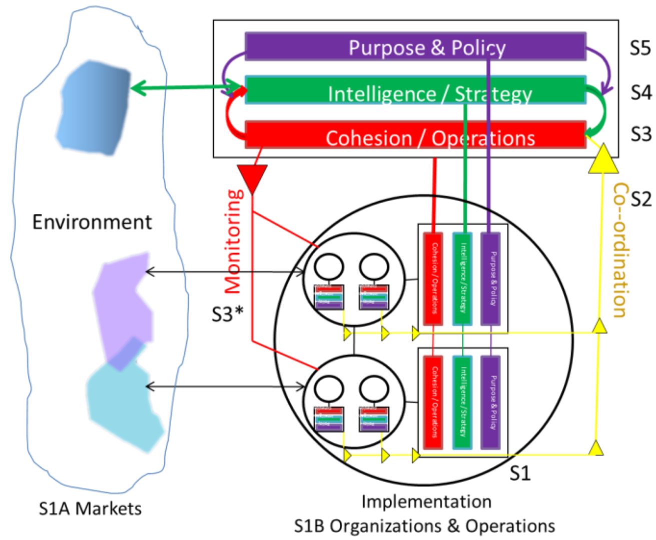
System 1 in a viable system contains several primary activities. Each System 1 (S1) primary activity is itself a viable system due to the recursive nature of systems as described above. These are concerned with performing a function that implements at least part of the key transformation of the organization. S1 represents the primary production activities through which market demand is detected and satisfied. Markets are depicted on the left of the diagram, and some of them are overlapping – indicating that some operational units share part of their customer base.

System 2 represents the information channels and bodies that allow the primary activities in System 1 to communicate between each other and which allow System 3 to monitor and co-ordinate the activities within System 1. For example, different parts of an organization may be responsible for responding to different market segments. S2 is the system through which these organizational parts coordinate and balance their activities – for example, common standards, resource use schedules, IT systems etc.

System 3 represents the structures and controls that are put into place to establish the rules, resources, rights and responsibilities of System 1 and to provide an interface with Systems 4/5 (S4 & S5). For example, if organizational units that produce for customers (S1) need to be integrated into a whole. The units agree to budgets and production targets that must then be fulfilled so that whole organization, system, thrives.

System 4 is comprised of part of the system that is responsible for looking outwards to the environment to monitor how the organization needs to adapt to remain viable. What are the implications of all the information gathered from the organizational units when we bring that together? What strategic projects and initiatives do we need to undertake for the whole system in light of a changing environment?

Figure 2: Viable Systems Model (VSM)



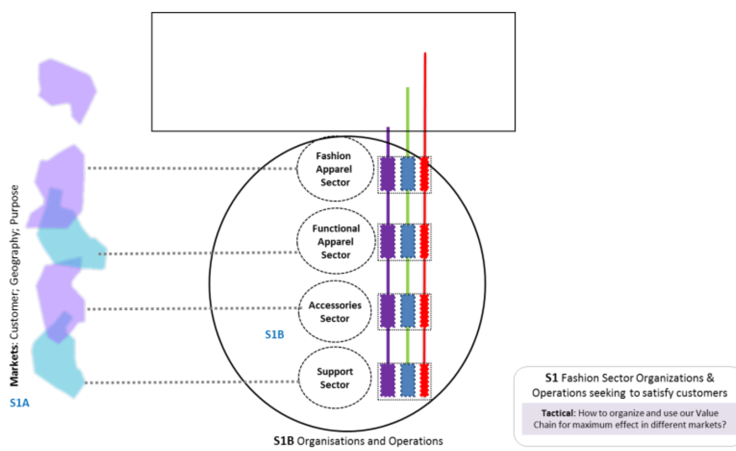
System 5 is responsible for policy decisions within the organization as a whole to balance demands from different parts of the organization and steer the organization as a whole. Without this the system would lose its focus and overall balance.

In broad terms, and applying it to a firm or industry, Systems 1-3 are concerned with the '***here and now'*** of the organization or industry's operations; System 4 is concerned with the '***there and then',*** the strategic responses to the effects of external, environmental and future demands on the organization or industry; and System 5 is concerned with balancing the ‘***here and now’*** and the ‘***there and then’*** to give policy directives which maintain the firm or industry as a viable entity.

In the following paragraphs, the VSM is applied to the Trinidad and Tobago Fashion Industry so as to have a common framework for analysis, and in the subsequent section we examine the evidence for all of the Industry sub-systems from a VSM perspective in order to determine whether or not the Industry is currently viable.

Sub-System1 (S1) – Market Access (S1A) and Organisations & Operations (S1B)

S1A and S1B speak to the structure of the Fashion Industry of Trinidad and Tobago. Specifically, they are concerned with the manner in which the Industry is organized in relation to the use of the Fashion Value Chain for maximum effect in different markets.



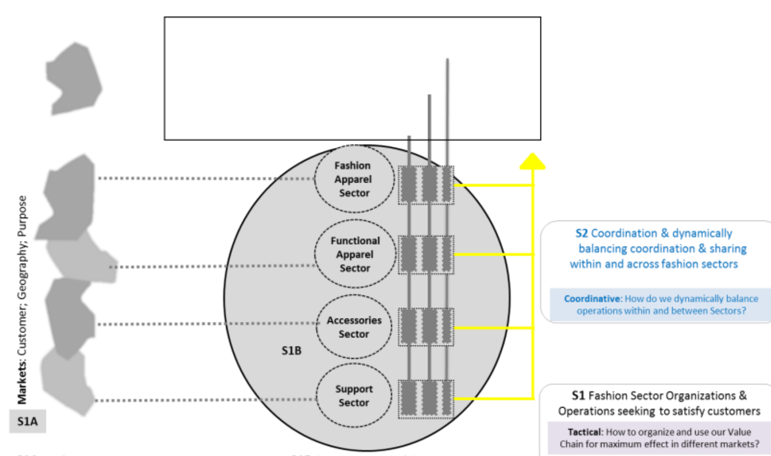
S1A focuses primarily on Markets, how these are organized or grouped into different customer groups, channels, geographies, or types.

S1B speaks to the Organizations and Operations that are seeking to understand the demands of the different markets, organize, and transform resource inputs into goods and services that are valued customers that make up the different customer groups or markets. Each S1B must have its own coordination, monitoring, cohesion, intelligence, policies function in order to be able to learn and respond. Porters Five forces model helps us to understand the attractiveness of different markets and the nature of the competition in them, while a value chain analysis helps to understand important aspects of organizations and operations.

Sub-System (S2) – Coordination

S2 refers to the Coordination System that needs to be in place to support the coordination of the operations within the individual sectors on all questions related to the current business and pre-empts conflicts or imbalances in the system.

It speaks to the manner in which sector views, priorities, information



requirements, resources, market intelligence, regulations / polices are shared and accessed by the individual sectors and are managed to optimize the effect of the Industry.

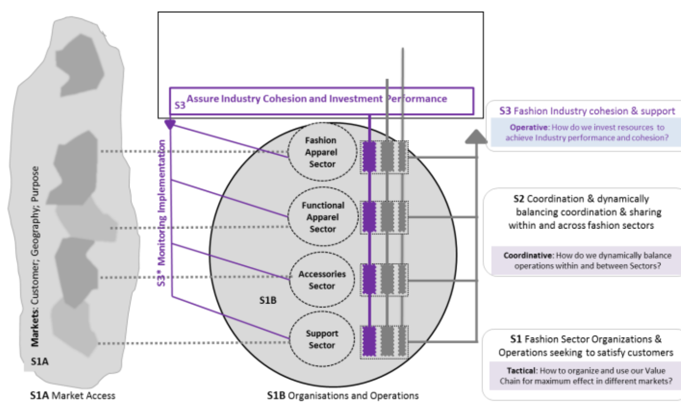
Sub-System 3 (S3) – Industry Cohesion, Support and Investment Performance

The S3 function needs to be synoptic in that it will take a general and comprehensive view of the entire Fashion Industry system with the intention of optimizing the collaboration and working arrangements across all sectors by identifying potentials for synergies and establishing strategic goals, objectives and implementation plans for each.

To do this, there must be continuous analysis and interpretation of the current situation and considerations for alternatives for implementation.

Sub-System 3* (S3*) - Monitoring Implementation and Auditing Adherence to Standards

In order to be able to manage achievement in terms of the results to be achieved for each sector and the Fashion Industry as a whole, there needs to be the collection of information about the success of the execution of the current agreed and jointly planned activities. This would be in the form of reports, evaluations, and first hand review of experiences. This activity needs to be conducted in addition to the formal annual reports on the various sectors for the Fashion Industry.

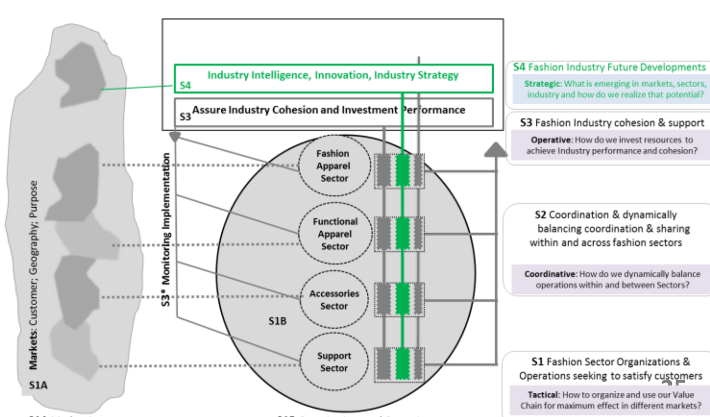


This monitoring and auditing channel (S3*) is not an intervention channel but only to obtain direct information of what the real experience with, and application of initiatives, is in relation to the agreed goals for each sector. This communication channel should allow items that are not clear or difficulties in implementation to be brought up and acted on through the appropriate operational channels.

Sub-system 4 (S4) - Strategy for Future Development: Industry Intelligence, Innovation, Industry Strategy

S4 is the sub-system through which:

- Future needs of the Fashion Industry and its constituents individually and collectively are determined
- Possible alternatives and emerging opportunities are monitored and



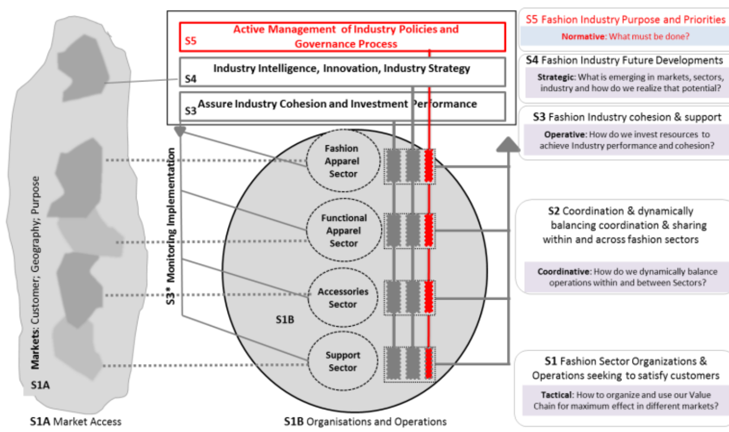
analyzed by or for Fashion Industry constituents

- Other bodies within and beyond the Fashion Industry are communicated with
- Different means for achieving objectives are collectively researched and developed
- Future developments and roll-out plans are developed
- Future resourcing requirements are determined
- Future training and development needs are identified.

In order to ensure viability, it is crucial that current implementation needs and realities are balanced with future needs.

Sub-System 5 (S5) – Purpose and Priorities – Management of Industry Polices and Governance Process

The S5 level deals with the development, implementation and monitoring of policies with respect to the strategic direction of the Fashion Industry. At this level, the purpose and priorities for the Fashion Industry are developed and mechanisms for collaboration across sectors can be articulated



2.2 S1A - Changes in the Fashion Industry Markets

We start the analysis by examining the context within which the Trinidad and Tobago Fashion Industry operates. Two main types of data are used for this exercise:

- *Data obtained directly from the markets about their characteristics and evolution;*
- *Insights about the markets based on the interaction with the market – industry data.*

The data indicates that there have been fundamental shifts and changes in the market. These shifts have occurred at the global, hemispheric, regional, and local levels. Markets that were previously very lucrative and provided large scale employment within the Fashion Industry of Trinidad and Tobago have significantly diminished. There are some which still exist however as well as new opportunities which have opened up.

Globally, the World Trade Organization (WTO) reports that apparel and textile exports were US$708.4 billion in 2012, up slightly from about US$706 billion in 2011. For the decade ending in 2010, compound annual growth averaged 5.5% worldwide.

Key trends emerging at the global level include:

- Fashion Industry valued at more than 1.7 trillion USD in 2012
- 75 million people employed worldwide
- Growth is taking place in emerging economies not in the developed countries.
- Fastest growing exporters-Vietnam, Brazil, China, Bangladesh, Turkey, India
- Aging populations or 'Old Gold' Fashion
- Different tastes and influencing trends
- Purchasing power is steadily increasing

Statistics to support these and other trends are highlighted in the following paragraphs.

2.2.1 Global Trends

The textile and apparel industry continues to be a major part of the economy of several countries, with Vietnam, China, Bangladesh, Turkey and India[6] among the fastest growing exporters.

The top ten textiles and clothing-exporting countries in 2012 were China, EU-27, India, Turkey, Bangladesh, United States, Vietnam, South Korea, Pakistan and Indonesia.

China continues to be the leading exporter of textiles and clothing, with its share in world exports rising marginally to 33% for textiles, up from 32% in 2011, and to 38% for clothing, up from 37% in 2011.[7]. Vietnam has achieved the highest growth of 7.5 % in textiles and apparel export. Conversely, the exports from the European Union have decreased by 8 %.

Table 1 below shows the top exporting countries and the value of exports in 2012 to 2013[8].

Table 1: Top exporting countries and value of exports (2012-2013)

Rank	Country	Value
1	China	$153B
2	Hong Kong	$24.5B
3	Italy	$23.2B
4	Bangladesh	$20B
5	Germany	$19.6B
6	India	$14.4B
7	Turkey	$14B
8	Vietnam	$13.1B
9	France	$11B
10	Spain	$9.3B

Source: Article titled "Top 10 Apparel Exporters", http://asicentralblog.com/blog/2013/06/03/top-10-apparel-exporters/

6 An Article titled, "Introduction to the Apparel & Textiles Industry" by plunkettresearch.com, dated 2014, at: http://www.plunkettresearch.com/apparel-textiles-clothing-market-research/industry-trends
7 An Article titled, "World textiles and clothing exports stagnated in 2012: WTO" by fibre2fashion.com, dated December 2013, at: http://www.fibre2fashion.com/news/textile-news/newsdetails.aspx?news_id=157365
8 An Article titled, "Top 10 Apparel Exporters" by asicentralblog.com, dated June 2013, at: http://asicentralblog.com/blog/2013/06/03/top-10-apparel-exporters/

2.2.1.1 Global Import Trends

With respect to country imports, the European Union and the United States remain the major markets for clothing, accounting for 38% and 20%, respectively, of world imports in 2012. In terms of value, the global textile and apparel trade stood at US$ 708 billion in 2012, with the textile sector accounting for around US$ 286 billion, and the apparel sector contributing around US$ 423 billion. In terms of percentage, global textiles exports decreased by 3% year-on-year in 2012, while clothing exports increased marginally by 1% year-on-year[9].

2.2.1.2 Global Market Growth Trends

The demand for apparel globally is expected to grow to US$2 trillion by 2025 crossing the current $1.1 trillion market estimate. The combined India and China markets are expected to surpass the US and European markets to reach $740 billion by 2025[10].

The research indicates that market growth is slowing down in developed markets and that the dynamics of the global fashion market are expected to change dramatically. It is anticipated that emerging economies will be the ones to fuel most of the growth in the global fashion market. Data suggests that countries such as *Brazil, Russia, India and China (BRIC), along with few other South-East Asian countries, will become the major growth drivers*[11.]

2.2.1.3 Global Review of Emerging Market Demand

The reverberations of the emerging market and shift in apparel markets are sounding loudly in the global apparel market, where the growth rate in emerging markets is expected to increase by 50 percent over the next 12 years. By contrast, the historical growth rate for the apparel market overall is just over 3% per year.

From the customer perspective, disposable income and consumer confidence in key buying regions, such as the United States and Europe, have underpinned revenue growth for apparel manufacturers, including a drastic 8.5% revenue increase in 2010.

While emerging markets account for 37% of women's midmarket apparel today, that share is expected to rise to more than 50% by 2025—three times faster than mature markets.

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9 An Article titled, "World textiles and clothing exports stagnated in 2012: WTO" by fibre2fashion.com, dated December 2013, at: http://www.fibre2fashion.com/news/textile-news/newsdetails.aspx?news_id=157365
10 An Article titled, "Apparel Market worth…" by just-style.com, dated July 2013, at: http://www.just-style.com/news/apparel-market-worth-us2-trillion-by-2025_id118510.aspx
11 An Article titled, "Changing Dynamics of Global Apparel Trends" by technopak.com, dated October 2011, at: http://www.technopak.com/files/Changing_Dynamics_of_Global_Apparel_Trends.pdf

For women's luxury apparel, the same trend is emerging (though from a much lower base). In 2004, emerging countries had a share of only about 7% in the luxury apparel market; today they account for 14% of the market, and by 2025 that figure is expected to increase to 25%[12].

2.2.1.4 Major sourcing countries for high level product categories

As shown in Table 2 below, countries such as India, Indonesia, Bangladesh, Vietnam and Cambodia are important Asian countries exporting high value-added and woven products to the developing countries.

Table 2: Preferred sourcing for major product categories and average order quantities

Location	Product Categories	Average Order Quantities
India	High Value-Added Women's Tops – Knits and Wovens	Low-Medium (Around 5,000-10,000 Pieces per Order)
Indonesia	High-value needle work, Dress Shirts, Outerwear	Medium (Around 8,000-10,000 Pieces per Order)
Bangladesh	Woven Bottoms and Basic Knits	High (More than 25,000 Pieces per Order)
Vietnam	Woven and Knits	Medium (Around 8,000-10,000 Pieces per Order)
Cambodia	Knits (Tops and Bottoms)	Medium (Around 8,000-10,000 Pieces per Order)

Source: Global Apparel Manufacturing Market Research Report (2011), quoted by Amit Gugnani in http://www.technopak.com/files/Changing_Dynamics_of_Global_Apparel_Trends.pdf

2.2.1.5 Global Product Differentiation

The global apparel markets in the recent past have shown a paradigm shift, moving towards increased product differentiation, catering to a diverse, aware and demanding customer base. Consumers seek to buy apparel that matches their status and lifestyle, as well as their needs and aspirations. As a result, retailers focus increasingly on following demographic shifts, societal, economic, and environmental concern trends.

Many retailers seek to offer products from higher to mid-market segments. The intention is to serve all customers by having customized products available for each segment. Catering to these needs of the consumer offers a high potential of improving business profit. Customized services have seen a significantly large increase over the last 3 to 4 years and continue to show positive trends.

12 An Article titled, "Fashion Sense: Apparel Companies Should Look To Cities For Growth" by forbes.com, dated April 2013, at: http://www.forbes.com/sites/mckinsey/2013/04/23/fashion-sense-apparel-companies-should-look-to-cities-for-growth/

2.2.1.6 Global Customer Segmentation Trends

'Cross-national' consumers have emerged that span the differences across countries, continents and languages.[13] As a result, firms within the Fashion Industry have found it necessary to adapt their service and product offerings so as maintain their competitiveness.

One of the more comprehensive models to emerge in the categorization of consumers is the Consumer Style Inventory (CSI), a psychological model that asks consumers about their attitudes toward and experience of shopping. Its cognitive and affective approach draws on a factor analysis with Varimax rotation to identify eight consumer types:

i. **The perfectionist** has a need to identify and purchase only that which is deemed to be of the best quality
ii. **Brand conscious** will choose what they consider the 'best' brand
iii. **Novelty conscious** tends to be super sensitive to new trends and will purchase what is new and hot
iv. **Recreational shoppers** are in it for the fun of shopping
v. **Price conscious consumers**, value price foremost, although they are often susceptible to interpersonal influence
vi. **Impulsive consumers** are under time pressure, or inclined to ignore their buying plan before purchasing
vii. **Confused consumers** are inclined to avoid too much information about products when buying
viii. **Habitual consumers,** with their favourite brands and stores, tend not be significantly affected by the other psychological variables[14].

Applications of this model can be seen in retailers like UNIQLO where the brand philosophy that drove success in its home market in Japan is based on the premise of a utilitarian retail experience.[15].

Other generic segmentations followed by companies include:

- **Gender-Related Segments**: small clothing retailers make frequent use of gender segments. For example, small, independent department stores may sell clothing lines for both men and women.
- **Age-Related Segments**: age is another distinguishing or demographic factor that helps clothing retailers determine their buying audiences. Many clothing manufacturers target teenage girls with their trendy new fashion lines, including jeans, blouses and other apparel.
- **Geographic Segments**: savvy marketers and retailers are cognizant of the fact that customer clothing preferences vary in different regions or geographical areas.

13 An Article titled, "STYLE SEGMENTATION AND THE GLOBAL CONSUMER" by miscmagazine.com, updated 2014, at; http://www.miscmagazine.com/style-segmentation-and-the-global-consumer/
14 An Article titled, "STYLE SEGMENTATION AND THE GLOBAL CONSUMER" by miscmagazine.com, updated 2014, at; http://www.miscmagazine.com/style-segmentation-and-the-global-consumer/
15 An Article titled, "STYLE SEGMENTATION AND THE GLOBAL CONSUMER" by miscmagazine.com, updated 2014, at; http://www.miscmagazine.com/style-segmentation-and-the-global-consumer/

- **Behaviour-Related Segments**: consumers' choices in products, including apparel, may also be behaviour-related, according to NetMBA.com, an online business reference site. For example, customers may purchase a small manufacturer's clothing line for prestige.
- **Lifestyle Segmentation**: lifestyle represents another market segment on which small clothing retailers and manufacturers base their product selections[16].

2.2.1.7 Global Supply Chain Trends

As the Fashion Industry is growing, so too is the need to create supply chains that are congruent with the needs and preferences of the customer. Carry Somers, founder of 'Fashion Revolution Day', cites a recent Australian Fashion Report that found that 61% of brands did not know where their garments were made, while 93% had no understanding of where their raw materials came from. Experts in sustainable fashion discussed steps regarding the need to ensure that brands identify people and resources behind their products[17].

An increasing number of organizations are finding it necessary to enhance the overall supply chain to improve efficiency and look at how best to capitalize on trade preferences like duty-free arrangements. Supply chain systems are also altered and reconfigured to reflect the changing desires and requirements of the customers.[18]

At present an increasing number of Fashion Industry players are focusing much more closely on the entire supply chain, seeking to eliminate process and product wastage so as to improve overall efficiencies.[19] There is also increasing pressure on shortened delivery time, an increased number of Stock Keeping Units (SKU's) and lower order quantities per SKU.

Retailers are exerting more efforts to curtail excess manufacturing expenses by maintaining a balance between demand and supply. Retailers such as Zara and H&M have successfully developed supply chains that facilitate quicker responses for fashion merchandise. Almost all retailers will continue to look at lower order quantities per style and reducing lead times.[20]

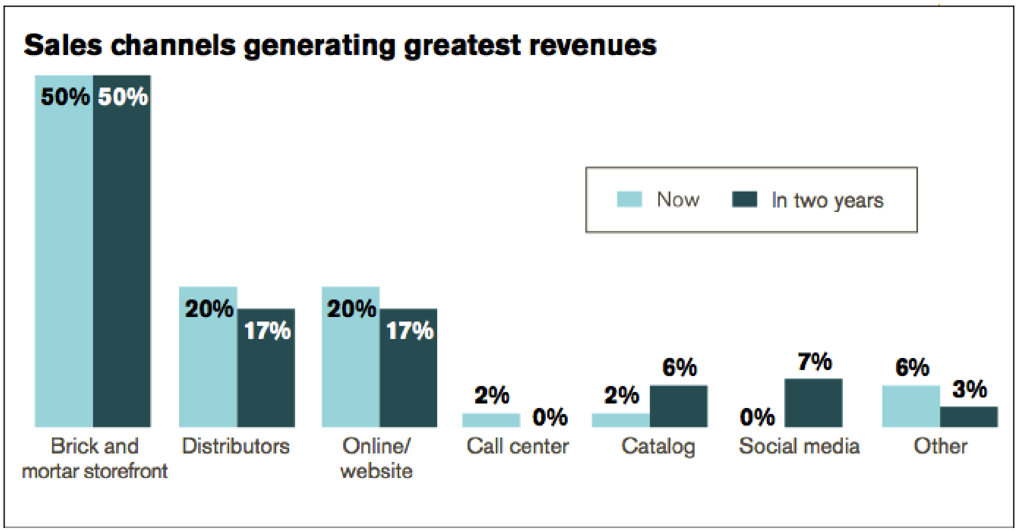
2.2.1.8 Global Distribution Channel Trends

Many apparel retailers currently offer, and subsequently support, multiple distribution channels. In fact, two (2) out of three (3) apparel retailers are offering at least two distribution channels and more than one in four (28%) run three or four channels. Most of those included in a recent study, offer retail (82%)

16 An Article titled, "List of Market Segments for the Retail Clothing Market" by http://smallbusiness.chron.com, undated, at: http://smallbusiness.chron.com/list-market-segments-retail-clothing-market-32446.html
17 An Article titled, "Can the global fashion industry become transparent?" by theguardian.com, dated April 2014, at: http://www.theguardian.com/sustainable-business/sustainable-fashion-blog/global-fashion-industry-become-transparent
18 An Article titled, "Changing Dynamics of Global Apparel Trends" by technopak.com, dated October 2011, at: http://www.technopak.com/files/Changing_Dynamics_of_Global_Apparel_Trends.pdf
19 An Article titled, "Global & U.S. Apparel Market Outlook 2013" by slideshare.net, dated May 2013, at: http://www.slideshare.net/damhuybinh/global-us-apparel-market-outlook-2013-opportunities-for-vietnam-sea-exporters
20 An Article titled, "Changing Dynamics of Global Apparel Trends" by technopak.com, dated October 2011, at: http://www.technopak.com/files/Changing_Dynamics_of_Global_Apparel_Trends.pdf

as a primary distribution channel. In addition, more than one-half (56%) also enable their website as a sales platform and nearly one-half (47%) provide a wholesale distribution outlet. [21]

Figure 3: Sales channel and revenue comparison



Source: "Multi-Channel Distribution in the Apparel Industry" by mmh.com, dated July 2013, at: http://www.mmh.com/wp_content/sdi_wp_content_073013.pdf p7.

2.2.2 Trends in Major Geographic Locations

The following sections provide an overview of the Fashion Industry within select geographic locations namely, the United States of America, the European Union, Asia and Latin America.

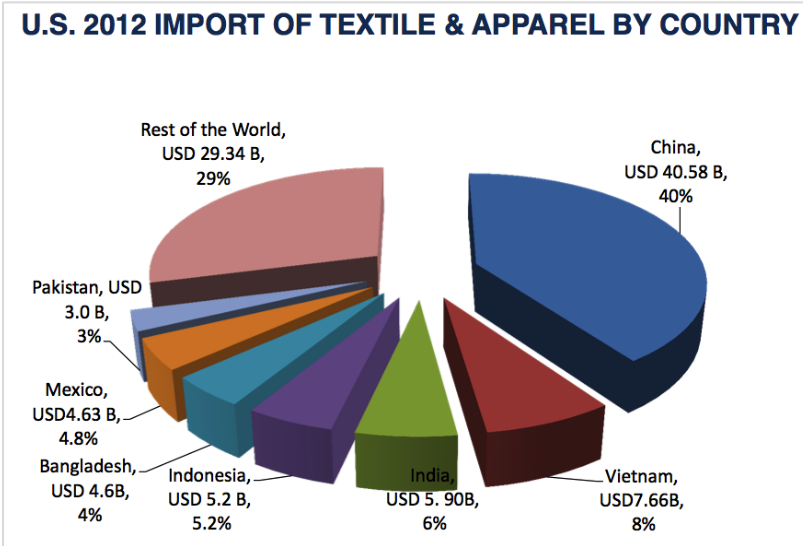
2.2.2.1 United States of America (USA)

Import Trends

In 2012 the USA was the world's largest importer of textiles and apparel with US$76.81 billion worth of apparel being imported from many countries across the world.[22] Presented graphically in Figure 6 below, the data highlights China as the predominant country the USA imports from with a figure of 40% for textile and apparel imports[23].

21 A Report titled, "Multi-Channel Distribution in the Apparel Industry" by mmh.com, dated July 2013, at: http://www.mmh.com/wp_content/sdi_wp_content_073013.pdf
22 An Article titled, "Global & U.S. Apparel Market Outlook 2013" by slideshare.net, dated May 2013, at: http://www.slideshare.net/damhuybinh/global-us-apparel-market-outlook-2013-opportunities-for-vietnam-sea-exporters
23 An Article titled, "Global & U.S. Apparel Market Outlook 2013" by slideshare.net, dated May 2013, at: http://www.slideshare.net/damhuybinh/global-us-apparel-market-outlook-2013-opportunities-for-vietnam-sea-exporters

Figure 4: U.S. Import of textiles and apparel by country (2012)



Source: Huy Binh, Dam. 2013. *Apparel Market Outlook 2013: Global & U.S.* http://www.slideshare.net/damhuybinh/global-us-apparel-market-outlook-2013-opportunities-for-vietnam-sea-exporters#.

Manufacturing Trends

In general, USA textile and apparel production has declined substantially over the last ten (10) years with production in apparel industries decreasing by 40% or more in certain sub-sectors. Domestic firms have shifted their focus to higher value-added activities, such as design, marketing and manufacturing of premium goods. Wages for these activities are high, which ultimately increases the labour-to-capital ratio.[24]

The combination of these activities has significantly contributed to the lack of proper infrastructure within the industry and an increased outsourcing of manufacturing outside the USA. However, the industry is characterized by high volatility due to unpredictable changes in fashion trends and activities which suggest an increase in apparel manufacturing in the USA.

In the past few years major designers and retailers such as Brooks Bros, and Saks, as well as dozens of smaller companies, have moved some production from foreign countries to the USA[25].

One reason for this shift may be due to existence of shorter delivery schedules. This is especially prevalent when demand for popular styles is high. The attractiveness of this form of manufacturing lies in the ability of USA factories to fill new orders in as little as two weeks as opposed to the average seven (7) weeks from an overseas plant.

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24 An Article titled, "Men's & Boys' Apparel Manufacturing Market Research Report" by ibisworld.com, dated May 2014, at: http://www.ibisworld.com/industry/default.aspx?indid=342
25 An Article titled, "Some apparel manufacturing 'reshoring' to USA" by usatoday.com, dated July 2013, at: http://www.usatoday.com/story/money/business/2013/07/04/some-apparel-manufacturing-returns-to-us/2454075/

Additionally, small labels are moving their manufacturing back home to the USA, to reduce costs, and stay competitive in the market. This, combined with specialization of a particular type of apparel manufacturing allows smaller firms to compete with large organizations. Though such initiatives have been slow, the trend indicates an increased use of ‘location’ as a strategic and competitive advantage. [26]

There are few economies of scale in manufacturing, because of the high labour content of most apparel. The USA Fashion Industry is struggling to rebuild the infrastructure for apparel manufacturing. Presently, manufacturers are typically small contract manufacturers, with between fifteen (15) to twenty-five (25) workers. The profitability of individual companies depends on efficient operations and the ability to secure contracts with clothing marketers and in some instance institutions have seen a 20% to 30% increase in sales in 2013[27].

2.2.2.2 European Union (EU)

The European Fashion Industry comprises more than 850,000 companies and five (5) million jobs and the Fashion Industry currently accounts for 3% of EU's GDP. Furthermore, Europe's high-end products account for 10% of total EU exports and provide one (1) million direct jobs. Bolstering the fashion and high-end industries is an important part of the European Commission's efforts to increase the share of industry in the GDP to 20% as set in the Europe 2020 strategy[28].

The apparel sector is an important part of the European manufacturing industry, playing a crucial role in the economy and social well-being in numerous regions of the EU-27. The high-end Fashion Industry has been the primary growth segment for the European Fashion Industry. Another important growth area is textiles for industrial and technical uses, where novel applications in the car industry, house construction, environmental technologies and sports are generating new, sophisticated and very specialized markets.

While technical textiles represent less than 25% of textile output in the EU-27, some countries previously more active in traditional textiles, have turned to these new products which now represent up to 80% of textile production in the Nordic countries and 50% in Germany.

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26 An Article titled, “Some apparel manufacturing 'reshoring' to USA” by usatoday.com, dated July 2013, at: http://www.usatoday.com/story/money/business/2013/07/04/some-apparel-manufacturing-returns-to-us/2454075/

27 An Article titled, “Some apparel manufacturing 'reshoring' to USA” by usatoday.com, dated July 2013, at: http://www.usatoday.com/story/money/business/2013/07/04/some-apparel-manufacturing-returns-to-us/2454075/

28 An Article titled, “The action plan for the fashion and high-end industries endorsed in London” by http://ec.europa.eu/, undated, at: http://ec.europa.eu/enterprise/newsroom/cf/itemdetail.cfm?item_id=7148

Import Trends

The graphic below represents the key figures in the EU textile and clothing Industry. The EU primarily imports from China, Bangladesh, Turkey and India, while it exports to Switzerland, Russia, US, and Japan[29].

Figure 5: Key figures on the European Textile & Clothing Industry, 2013

KEY FIGURES 2013
E.U. TEXTILE & CLOTHING INDUSTRY

E.U.-28	Unit	2013 e	13/12 %
TURNOVER	**Bil.Euro**	**166,5**	**-1,2%**
- MAN-MADE FIBRES*		10,2	5,9%
- TEXTILES		81,6	-0,1%
- CLOTHING		74,7	-3,3%
INVESTMENT	**Bil.Euro**	**4,1**	**-0,8%**
- MAN-MADE FIBRES*		0,3	6,0%
- TEXTILES		2,5	-0,1%
- CLOTHING		1,3	-3,3%
EMPLOYMENT	**1000 pers**	**1.664**	**-4,0%**
- MAN-MADE FIBRES*		21	-1,0%
- TEXTILES		613	-3,7%
- CLOTHING		1.030	-4,2%
COMPANIES	**Number**	**172.662**	**-4,0%**
- MAN-MADE FIBRES*		77	-1,3%
- TEXTILES		52.690	-3,7%
- CLOTHING		119.895	-4,2%
EXTRA E.U.-28 IMPORTS	**Bil.Euro**	**92,3**	**2,0%**
- TEXTILES		25,3	3,3%
- CLOTHING		67,0	1,6%
EXTRA E.U.-28 EXPORTS	**Bil.Euro**	**42,4**	**2,1%**
- TEXTILES		21,5	0,1%
- CLOTHING		20,9	4,3%
E.U.-28 TRADE BALANCE	**Bil.Euro**	**-49,9**	**2,0%**
- TEXTILES		-3,8	25,9%
- CLOTHING		-46,1	0,4%
Turnover/Employee	EURO/pers	100.050	-0,5%
Investment/Turnover	%	2,5%	-
Exports/Turnover	%	25,5%	-
Employees/Company	pers	10	-

Source: An Article titled, "Euratex_Keyfigures_2013" by euratex.eu, dated 2013, at: http://euratex.eu/index.php?eID=tx_nawsecuredl&u=0&file=fileadmin/user_upload/documents/key_data/Euratex_Keyfigures_2013.pdf&t=1406971556&hash=a48ad991fbe3ca91128f9bd1a773647a24379036

Manufacturing Trends

Domestic or regional manufacturing has fallen due to increasing competitive pressure from Asian producers. Combined with rising labour costs in European countries, this has led to EU suppliers moving labour-intensive operations to new member states, particularly Poland and Romania. Also, strongly linked with EU suppliers are Tunisia, Morocco and Turkey, because of their reputation for manufacturing high quality products as well as their geographical proximity, which enables fast response to market demands[30].

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29 An Article titled, "Euratex_Keyfigures_2013" by euratex.eu, dated 2013, at: http://euratex.eu/index.php?eID=tx_nawsecuredl&u=0&file=fileadmin/user_upload/documents/key_data/Euratex_Keyfigures_2013.pdf&t=1406971556&hash=a48ad991fbe3ca91128f9bd1a773647a24379036

30 An Article titled, "Tough choices, rich promise for fashion industry" by nx.macorig.com, dated July 2014, at: http://lnx.macorig.com/bld/content/view/52/51/

In garment manufacturing, European manufacturers have traditionally dominated in fashion and creativity, but the sector is now in decline because of increasing labour costs. Production of home textiles however, is highly automated and capital-intensive, with labour costs playing a much smaller part, so this sub-sector of production has proven to be more stable.

Improved technology adoption has also contributed to an increase in manufacturing. For example, the use of 3D body scanners and web-based data communication between retailer and manufacturer help to produce individual made-to-measure garments at a price comparable to that of a mass product in a shorter period of time. Numerous other new technologies emerging like virtual design, advanced robots, optical and electronic fibres and spherical sewing also help build competitive advantage for manufacturing in the region[31].

Export Trends

European craftsmanship has a worldwide reputation. For example, 62% of all goods manufactured by European high-end brands are sold outside Europe. In the segment of personal high-end goods (fashion, accessories, jewellery and watches, leather goods, perfumes and cosmetics) Europe represents 74% of the global value.

In 2012, despite a decrease in physical production, the EU Fashion Industry registered good results in its exports outside the EU (+6,3% in €), due to very active clothing deliveries and positive textiles growth in markets like China, Russia and the US. Those developments are the result of European textile and fashion SME's efforts to constantly invest in innovative products, processes, services and business models[32].

2.2.2.3 Asia

The fashion sub-sector remains one of the most important drivers of the Asian countries' exports and is increasingly playing an important role in the global Fashion Industry[33]. This is primarily evident in countries such as China, India and Turkey.

In India for example, the apparel market is currently valued at USD 40 billion, and is projected to grow at a Compound Annual Growth Rate (CAGR) of 13%[34]. The data indicates that India was the most dynamic luxury market over the 2008 to 2013 period and is forecast to grow by a further 86% in constant value terms over the five years to 2018, followed by China at 72%[35].

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31 An Article titled, "Tough choices, rich promise for fashion industry" by nx.macorig.com, dated July 2014, at: http://lnx.macorig.com/bld/content/view/52/51/

32 An Article titled, "The strength of the European textile and apparel industry lies in its innovative creativity and its flexibility" by texprocess.messefrankfurt.com, dated April 2013, at: http://texprocess.messefrankfurt.com/frankfurt/en/besucher/news/marchi.html

33 An Article titled, "Introduction to the Apparel & Textiles Industry" by plunkettresearch.com, dated 2014, at: http://www.plunkettresearch.com/apparel-textiles-clothing-market-research/industry-trends

34 An Article titled, "Indian apparel market is large going to be enormous" by citiindia.com, dated September 2012, at: http://www.citiindia.com/pdf/Harminder%20Sahni.pdf

35 An Article titled, "Luxury Sales to Exceed $318 Billion…." By businessoffashion.com, dated October 2013, at: http://www.businessoffashion.com/2013/10/euromonitor-coach-michael-kors-louis-vuitton-versace-fflur-roberts.html

In Turkey also, textiles and clothing are among the most important sectors of the Turkish economy and foreign trade. Accounting for about 7% of the GDP together, these two sectors are the core of the Turkish economy in terms of GDP contribution, share in manufacturing, employment, investments and macroeconomic indicators. These sectors had an 18.3% share in total export volume in 2013.

Manufacturing Trends
China continues to have a robust apparel manufacturing industry, by fostering manufacturing that requires greater skills, better technology and more investment in advanced equipment.

Many Chinese firms are massive in size, with tightly integrated units providing rapid design, manufacturing and logistics.

Exports Trends
China's textile exports soared from $7.2 billion in 1990 to $95.4 billion in 2012, according to the World Trade Organization's International Trade Statistics 2013. In terms of apparel, China enjoyed a 37.8% market share of global exports in 2012, at $160 billion, up from a mere $8.9 billion in 1990.

The rest of Asia, China not included, had a 20.4% market share in 2012. [36] India's share of the world's textile and apparel exports stands at 4.5%. It is estimated that due to the increasing shift of textile and apparel production to Asian nations and the deteriorating export-competitiveness of China, this figure will grow to 8% by 2020, with a total exports value of US $82 billion[37]. Turkey is also a significant player in the export market. In 2013 the total value of clothing exports was US$ 15 billion with approximately 65% of its production being exported.

2.2.2.4 Latin American (LAM)
Latin America is recognized as a geostrategic and economic hub of international importance, forcing the brands of the fashion world to expand in this market and to reinvent themselves to take advantage of the current opportunities. The Fashion Industry in Latin America currently represents about US $480 million a year in production and commercialization and grew 26% in the last five years compared to an increase of almost zero in previous years.

The Fashion Industry currently employs around 45 million people throughout the entire Latam region. This industry has turned into an activity of much economic and commercial importance, being primarily led by Brazil, Mexico, Colombia and Chile, which together represent 80% of this overall economic value[38].

36 An Article titled, "Introduction to the Apparel & Textiles Industry" by plunkettresearch.com, dated 2014, at: http://www.plunkettresearch.com/apparel-textiles-clothing-market-research/industry-trends

37 An Article titled, "India's textile-apparel industry to touch $223 bn by 2021: Ficci" by http://articles.economictimes.indiatimes.com/, dated October 2012, at: http://articles.economictimes.indiatimes.com/2012-10-10/news/34363404_1_apparel-exports-textile-and-apparel-cent-of-world-trade

38 Information presented in the panel "Impulso a la Moda Latinoamericana", panel held during the National Congress of 'Detallistas de Moda'. Jalisco (México), October 9th, 2013.

Summary data for the prominent LAM players are highlighted below:

I. **Brazil**
- 5th largest producer of garments in the world
- Fashion accounts for 5.5% of GDP
- In 2012, USD 56.7 billion and the value of exports without cotton fibre was USD 1.28 billion.
- The Fashion Industry is the second largest employer in Brazil in the manufacturing sector:
  - 1,658 million workers
  - 36,200 companies
  - 75% female work force

II. **Mexico**
- Garment manufacturing accounts for 10% of GDP
- 2.371 establishments engaged in the retail department stores
- 172,480 stores dedicated to selling clothes, jewelry, accessories and shoes.
- 250 Mexican firms export their goods overseas

III. **Colombia**
- Colombia is currently viewed as the epicenter of LAM fashion
- Textile and fashion account for 12% of the industrial GDP
- 17.297 million dollars was generated in the second half of 2012 for apparel market (out of a total of 361.826 million dollars of all Latin America)
- Medillín alone has 13,000 fashion related companies that employ over 100,000 people.
- Colombians are buying local. Vélez (Leather bags), Arturo Calle (menswear), Totto (bags), Studio F (womenswear) and Tennis (young fashion) are some of the main trendy local brands of country.

2.2.2.5 Caribbean Region

The regional market size in the Caribbean Fashion Industry is very small. "According to rough estimates, the Caribbean Fashion Industry — English, French, Spanish and Dutch — is conservatively worth J$10 billion per year (US$ 8,881,170). The market is estimated to grow to be fully developed at a value of 10 times this amount.[39]

There is a wealth of information on the regional Fashion Industry, particularly for Jamaica and the Dominican Republic, given their large-scale garment manufacturing operations. This literature review is by no means exhaustive, but offers an overview of some of the salient articles, reports and national policies written on the sector and highlights gaps in the data.

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[39] 2012. "Regional Fashion industry Worth $10 Billion a Year — Cooper." *Jamaicaobserver.com, June 22.*

Four countries in Latin America and the Caribbean have been the main beneficiaries under the Caribbean Basin Initiative (CBI), namely, the Dominican Republic, Haiti, Jamaica and Costa Rica in terms of the highest volumes of export of locally-manufactured garments to the U.S. in the 1980s.

These and other trends for the Caribbean countries who are significantly active in the Fashion Industry are highlighted below:

I. **Jamaica Trends**

- Between 2003-2007 apparel exports fell by 87%, declining from US$ 11.4 m to US$1.5m.
- In 2006, total apparel exports were valued at USD 4.3m (USD 1.4m in apparel/accessories knitted or crocheted and USD 2.9m for not knitted or crocheted.
- Whilst there has been a general decline in Jamaica's Fashion Industry there have been two 2 emerging products: women's blouses and shirts, grew by 14%, share of exports grew by 8% and babies' garments and clothing accessories.
- In 2006, jewelry exports = USD 2.1 m.
- The USA is Jamaica's 5th most important trading partner for apparel/accessories knitted or crocheted.
- Regional competitors include the Dominican Republic and Mexico.
- Drastic decline in the number of employees working in the sector from 36,000 in 1995 to 18,000 in 2000.

Table 3: Number of workers in Jamaican Apparel Industry

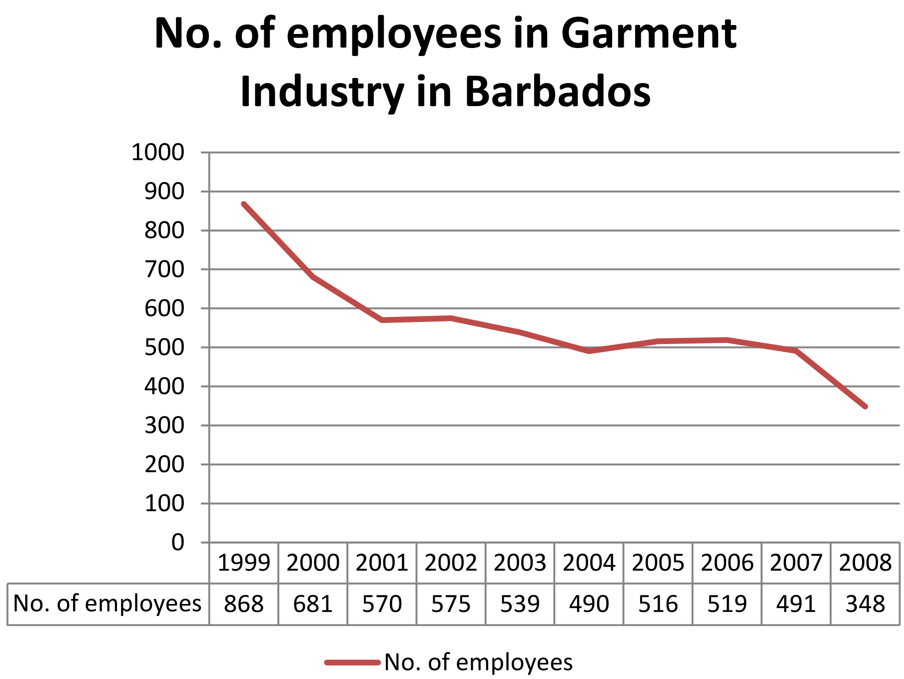
YEAR	NO OF EMPLOYEES
1995	36,000
2000	18,000

Source: Trade Policy and Caribbean Development: Prospects and Options, Kairi Consultants Ltd., Caribbean Development Bank, Barbados, August 2001.

II. **Barbados**

Similar to Jamaica, decline in employment has also been observed in Barbados' garment industry. In addition to Table 4 below both Figure 8 and 9 also illustrate the performance of the Barbadian fashion sector over the last few decades, in terms of employment data and export earnings.

Figure 6: Number of employees in Garment Industry in Barbados, 1999-2008



	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
No. of employees	868	681	570	575	539	490	516	519	491	348

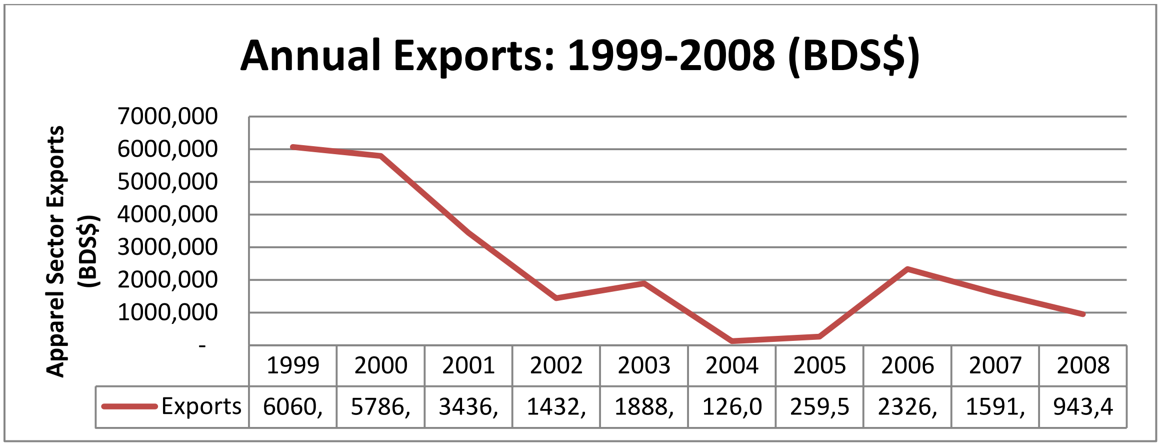
Source: Barbados Statistical Service; BIDC's Employment & Investment Survey

Table 4: Major Indicators for the Apparel Industry in Barbados (2004-2008)

Major Indicators	2004	2005	2006	2007	2008
No. of employees	**490**	**516**	**519**	**491**	**348**
No of Enterprises	**23**	**23**	**23**	**20**	**18**
Textiles & Apparel:					
Annual Domestic Exports (BDS $M)	**1.3**	**2.6**	**2.3**	**1.6**	**0.9**
Annual Imports (BDS $M)	**40.4**	**49.8**	**45.6**	**49.5**	**48.0**
Annual Domestic Output (BDS $M)	**7.5**	**7.5**	**7.6**	**7.0**	**3.5**

Source: Barbados Statistical Service; BIDC's Employment & Investment Survey

Figure 7: Value of Apparel Industry Exports from Barbados (1999-2008)

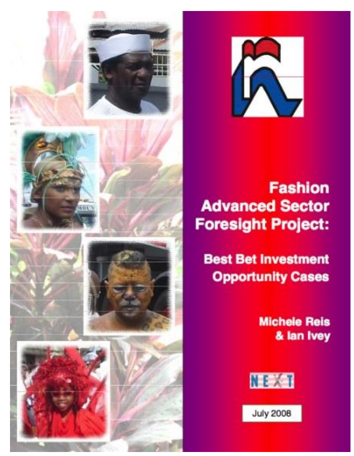


Source: Barbados Statistical Service

III. **Dominican Republic**

- In the 1960s EPZs 16,000-100,000 jobs
- In 2000, 50% of exports came from garment manufacturing in the FTZs, 70% of labour force.
- 145,00 workers by 2000 working in 46 FTZs, US$2.5billion
- Drastic decline since 2005.
- By 2006, fell from 145,000 to 41,000, exports to the USA were US$ 939 m.

2.2.2.6 Trinidad and Tobago



To date, no comprehensive study has been done to ascertain the viability of the Fashion Industry in Trinidad and Tobago. Whilst there has been some research conducted such as the NIHERST Foresighting and Innovation Studies (2006-2010), the collection of data to determine its size or contribution to the national economy in order to inform national policy has not been consistent.

According to available statistics, during the period 2005-2008[40], gross sales revenues amounted to TT$26.5 million (there is no indication of what percentage of that figure accounts for export earnings however). More recent data however, indicates that Trinidad and Tobago's Fashion Industry has been in a steady decline over the past decade. This is presented in Table 5 and Figure 9 below.

[40] Key Trinidad and Tobago sectors (2011) The Ministry of Trade and Industry, Government of the Republic of Trinidad and Tobago

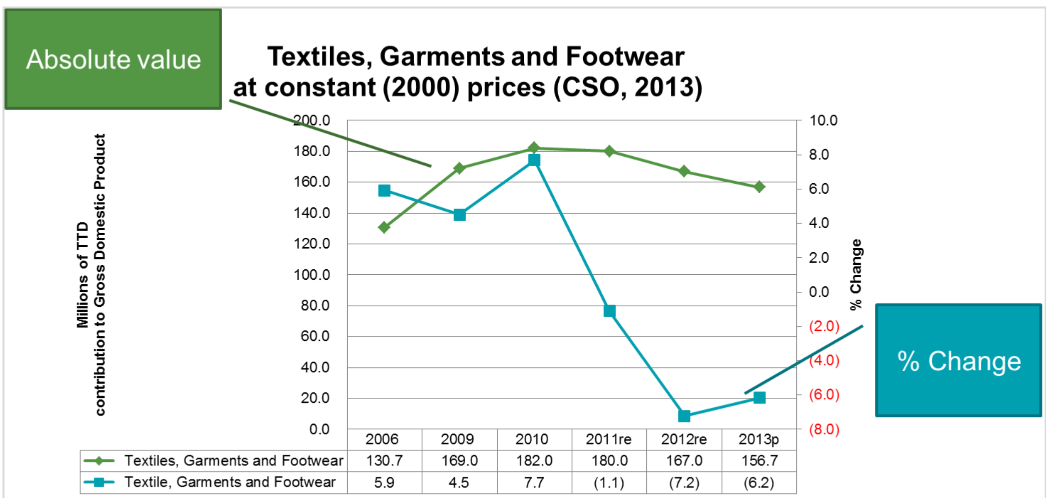
Table 5: Garment Manufacturers and Employment in Trinidad and Tobago

Year	No. of Garment Manufacturers	No. of Employees
1963	28	2,300
1978	130	7,000
2002	178	-
2003	150	-

* Source: Report by the Commission of Enquiry on All Aspects of the Garment Industry in Trinidad and Tobago, 1979

** Data from Central Statistical Office (CSO) contained in NIHERST FORESIGNTING REPORT

Figure 8: Textiles, Garments and Footwear

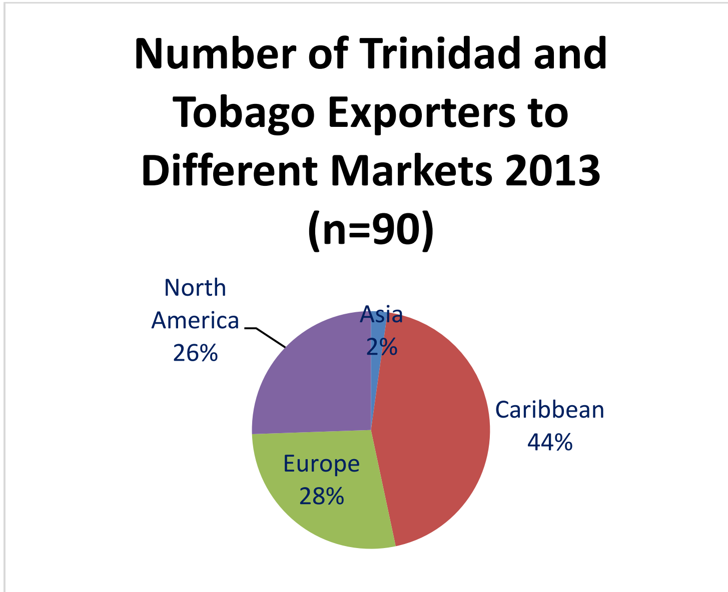


Current data is critical to assessing the performance of the sector and its potential for growth and overall developmental impact, in addition to the scale and generation of employment, export performance, value-added contribution, foreign exchange earnings and the creation of linkages to other important industries. In the following paragraphs, a synopsis of the analysis of the primary data collected during the course of this strategic planning exercise is presented.

The data indicates that currently, 44% of garment manufacturers surveyed for this project indicated that they exported to other parts of the Caribbean, 28% exported to Europe, 26% to North America and a negligible 2% to Asian countries. These figures reveal the extent to which regional trade remains relatively strong and the dominance of the U.S., Canada and Europe as traditional markets for export of Trinidad and Tobago fashion products.

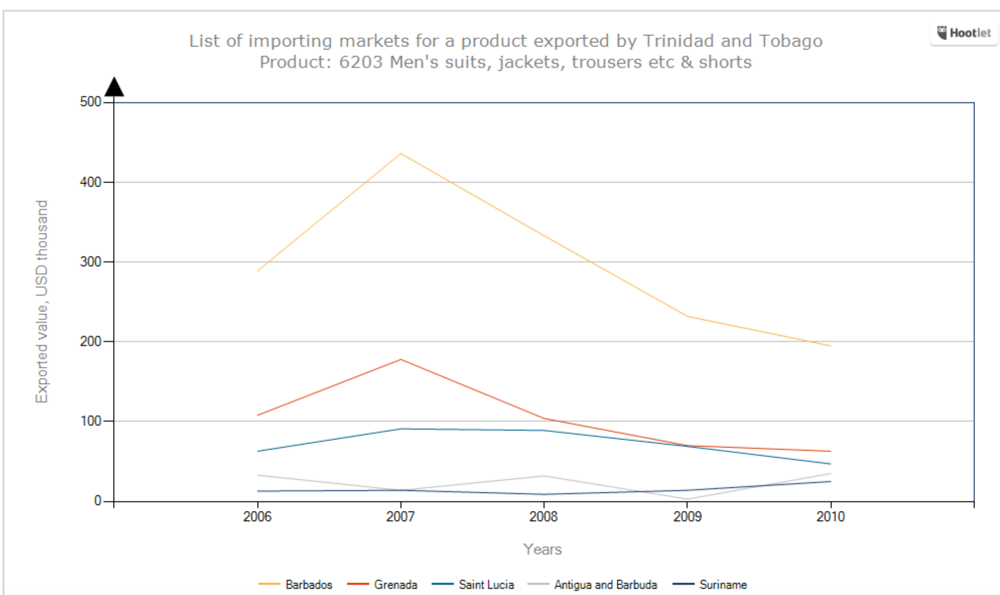
The figure below indicates that there are avenues for diversification of exports to extend to Asia and Latin America, given the small percentage of fashion stakeholders who currently export to the Asian market and the absence of Latin American countries as an export destination among respondents to the survey. The majority of exporters are small companies which contribute only a minimal portion to the total value of the country's exports, but which undoubtedly have significant potential to grow.

Figure 9: Trinidad and Tobago Export Markets



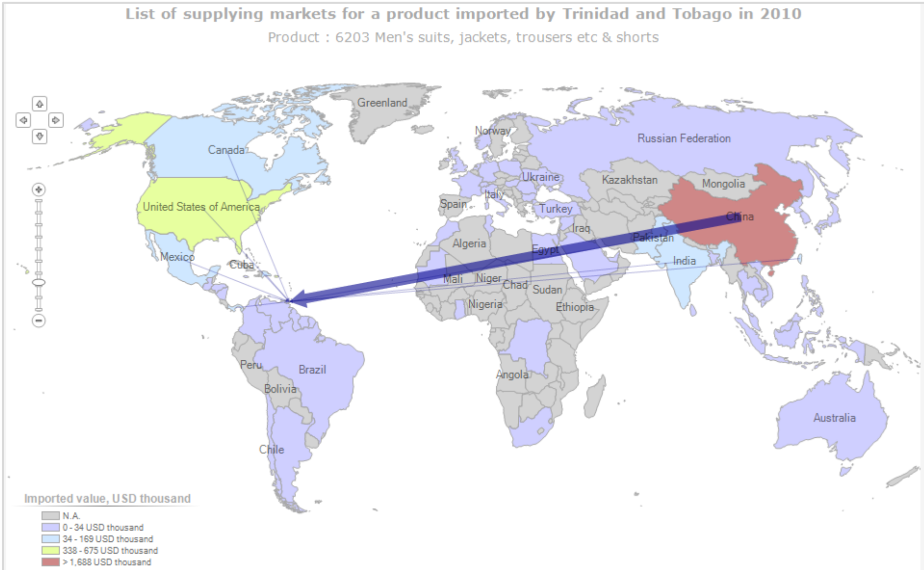
As shown in Figures 12 and 13 below, data received from the Central Statistical Office of Trinidad and Tobago further highlight that the potential export capacity of local fashion stakeholders remains an important challenge in fostering growth on a global scale.

Figure 10: List of importing markets for a product exported by Trinidad and Tobago – Product: 6203 Men's suits, jackets, trousers etc. and shorts



Source: http://www.trademap.org/tradestat/Country_SelProductCountry_TS_Graph.aspx?nvpm=1|780||||6203|||4|1|1|2|2|1|2|1|1

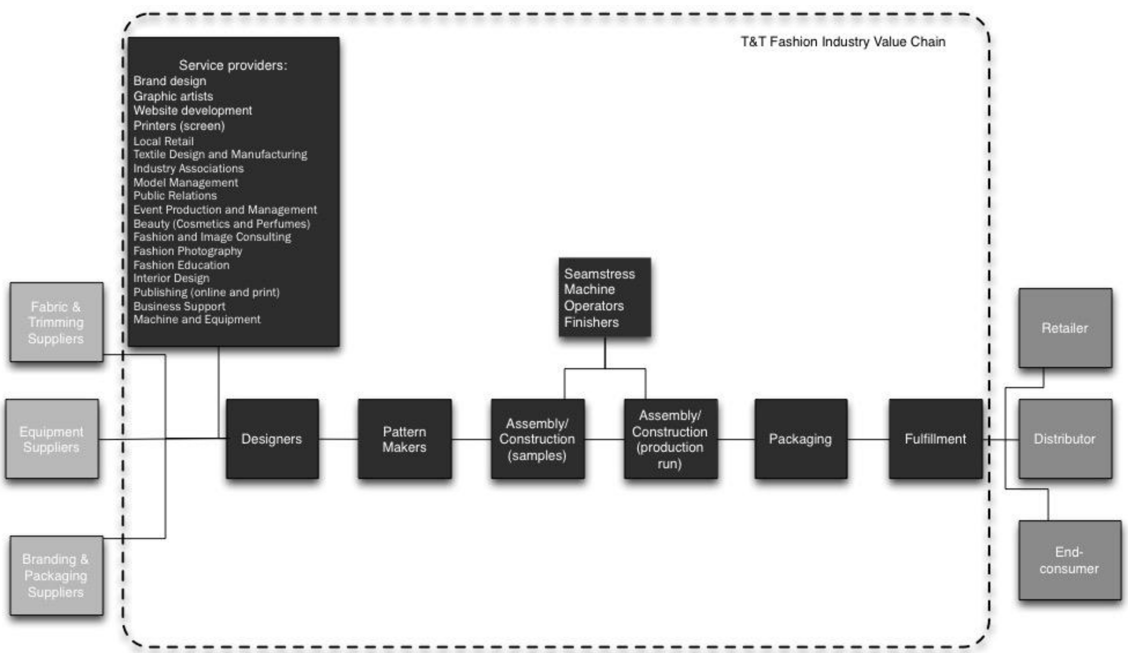
Figure 11: List of supplying markets for a product imported by Trinidad and Tobago in 2010 – Product: 6203 Men's suits, jackets, trousers etc. and shorts



2.3 S1B – Fashion Sectors and Organizations

There currently exists no global consensus as to the definition of the Fashion Industry. Rather, it is typically referenced through the use of its value chain. An adapted version of the Fashion Value chain is presented below with further details provided in section 2.3.2.

Figure 12: The Trinidad and Tobago Fashion Industry Value Chain



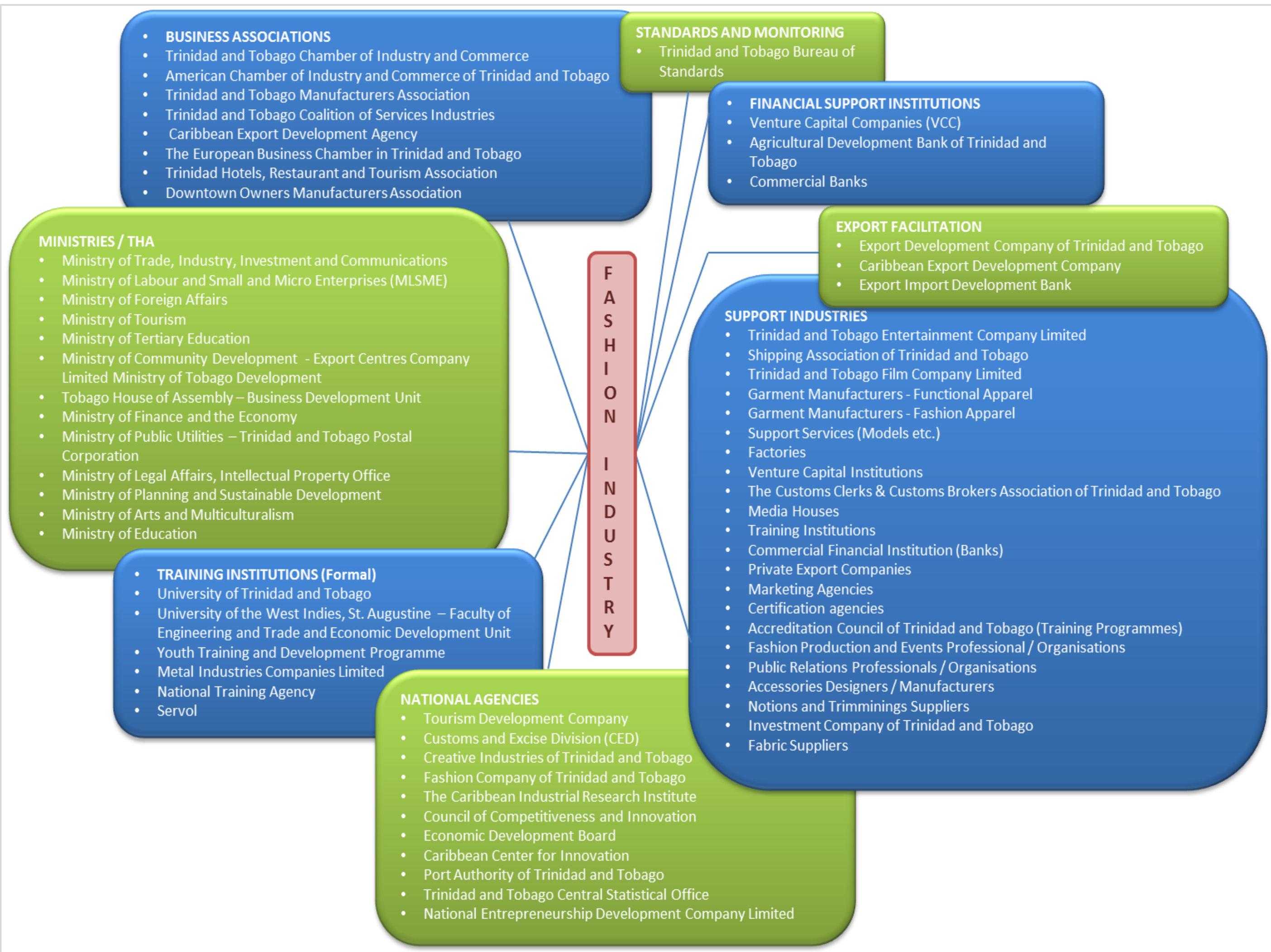
Source: adapted from the National Export Strategy of Jamaica[41]

[41] Ministry of Industry Investment Commerce, Jamaica Trade Invest, Jamaica Exporters Association. 2009. National Export Strategy - Jamaica.

Noteworthy also, is that the key (direct and indirect) stakeholder groups within the value chain are consistent and typically include the following: *Business Associations; Standards and Monitoring Institutions; Financial Support Institutions; Export Facilitation Institutions; Training Organisations; Government Ministries / State Agencies; National Agencies and; Support Industries*.

Figure 15 below provides an overview of the key stakeholder groups within Trinidad and Tobago's Fashion Industry, as identified by the members of the Consultative Group and participants of the National Consultation Sessions. This listing while comprehensive is not exhaustive. The strategic role and function of these various groups are presented in section 2.4.

Figure 13: Stakeholder groups of the Trinidad and Tobago Fashion Industry



In order to increase strengthen the viability of the Trinidad and Tobago Fashion Industry there is the need for a strengthening of the coordination amongst the various stakeholders identified above. Further details and analysis of the relationship of the stakeholder groups and their role and function are presented in Section 2.4 below.

2.3.1 Companies - Organisations and Operations

Data and research conducted for this project indicates that the business strategies of the firms that form the core of the Fashion Industry as defined under this project, are generally not focused, competitive or lend toward sustainability of these firms. Additionally, the manufacturing and operational capacity of many of the players are basic and at the same time inefficient.

Further, the majority of firms are small players and do not have the capacity to compete on the international market presently. Young, newly-graduated designers have difficulty starting up, middle-range designers/firms have problems expanding and financing projects whist some are now starting off, others are mid-range (have some level of success) but require significant support to scale up and expand overseas.

The challenges presently experienced by the local Fashion Industry can be summarized as follows:

- Operates within a small domestic market with disposable income
- Players within each sector are not at the same level and many are not export-ready.
- Fragmentation exists within the industry fueled by a lack of trust resulting in the hesitation of partnerships, collaboration and sharing production costs
- Competency of pattern-makers are high, but the manufacturing process is inefficient to fill bulk orders
- Support infrastructure is not cohesive

However, the industry does appear to have the potential to develop and opportunities for growth do exist. To assess these opportunities, the *Benefits Potential Framework* has been used. Shown in Figure 16 below, the Benefits Potential Framework looks at assessing the external and internal opportunities that exist within the sector and the industry as a whole, in relation to current capacity in each area. These are highlighted in the page immediately following.

Figure 14: Benefit Potentials

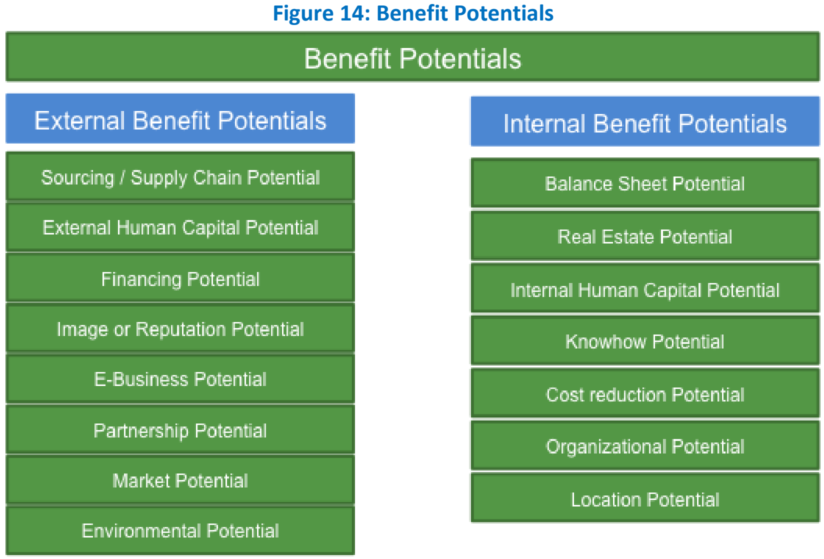


Table 6: Sample of Self-Reported Benefit Potential Utilization by Industry Members

Benefit Potential	Current Utilization (%)	What is the opportunity	What do you want to do to realize it?	Is your success in relation to this potential dependent on someone else? Do what?
Sourcing/Supply chain	40%	Improving quality and competitive advantage	Create new network of suppliers and shipping	YES, supply at reasonable rates and quality
External Human Capital	10%	Cheap Skilled Labor	Set up training facility	YES, finance
Corporate/ Improve Reputation	70%	Selling storyline and brand	Expand on marketing opportunities, developing strategies	YES, to develop marketing Plans
E-Business	0%	Expanding into INT'L markets	Create and sustain E-Platform	YES, Bankers to create platform
Market Potential	5%	Entrance into new markets, increased income	Participating in trade forums, getting Int'l representation	YES, Market efficiently
Technology Potential	60%	Increase Production	Obtain funding	YES, to give funds
Know How Potential	80%	Continuous research and upgrade	Channel it correctly	NO
Organizational Potential	60%	Deliver Timely, set up more efficient production line, improve out bound and in bound logistics	Review structure and how it relates	

The opportunities identified in Table 6 above are indicative of an inefficient use of the Value Chain by members of the Industry since many players have been found to only utilize one or a few areas of the Global Fashion Industry value chain.

2.3.2 Fashion Industry Sectors in Trinidad & Tobago

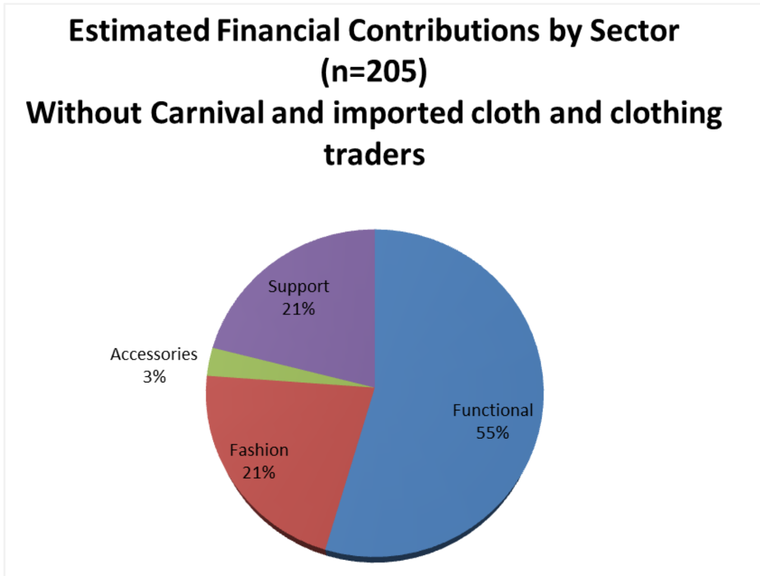
For the purposes of this Strategic Plan, the Trinidad and Tobago Fashion Value Chain was primarily utilized to define the scope of the local Fashion Industry. The Fashion Industry members have been grouped into four (4) broad areas that are currently active and form the core of the local industry. These are defined as follows:

- ➔ **Fashion Apparel** - refers to garments worn with fashion and style in mind. It speaks more to the design aesthetic and beauty and includes both high fashion and mass fashion.
- ➔ **Functional Apparel** - refers to garments designed for a specific function while these may be fashionable as well, for this study these items are those that are more functional in nature and may be produced for those with more multifaceted and complex requirements eg. medical uniforms, safety clothing, uniforms etc.
- ➔ **Accessories** - refers to items that can be used to accentuate the fashion / functional garment. It includes items such as jewellery, hats, purses/bags, shoes, scarves etc.
- ➔ **Support** - refers to organizations primarily within the Supply (ancillary services that directly support the creation of apparel through the provision of raw materials - notions, trimmings, textiles, equipment etc.) and Distribution (Branding, Marketing and PR, Business Development, Beauty/ Cosmetics, Fashion Show production, Model Management, Merchandising etc.) Segments of the fashion value chain.

These sectors are represented in Figure 167 and 18 below, along with the estimated size and proportions of financial contribution to Trinidad and Tobago Economy, 2014.

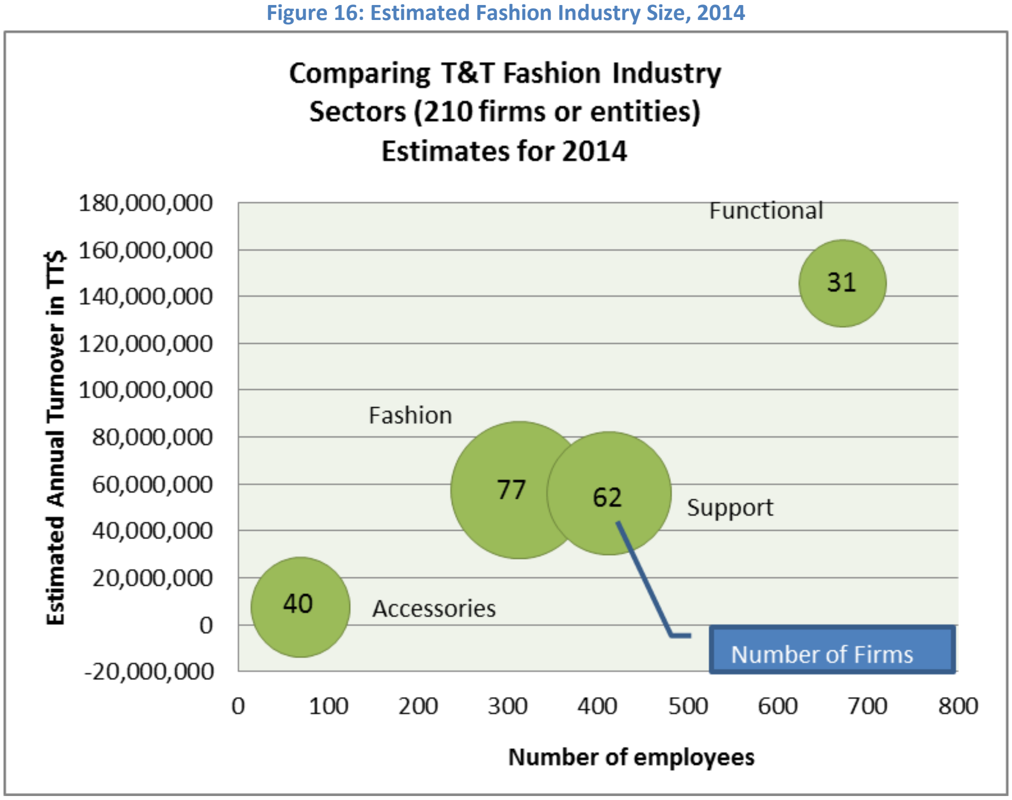
It should be noted that in defining the Fashion Industry, consideration was also placed on whether Mas should be included as a sector. It is acknowledged that Mas is an important industry in which many persons who are working primarily in the Fashion Industry also take part professionally. However, the purpose and intent of the apparel in Mas is different. The linkages between the two sectors are very important and the Fashion Industry Strategy presented in this document is seeking to strengthen these links. At present there are large studies being conducted that specifically focus on the Carnival sector and when those findings are made public, the Fashion Industry should take them into account. Additional information about the relationship between Mas and Fashion is provided in Appendix 5.

Figure 15: Estimated Proportions of Financial Contribution by Fashion Industry Sectors to Trinidad and Tobago Economy, 2014



Source: Syntegra Change Architects Ltd survey and estimates

Figure 16: Estimated Fashion Industry Size, 2014



Source: Syntegra Change Architects Ltd survey and estimates (Note: Organization and production are presented in dotted lines because the sectors within the Fashion Industry of Trinidad and Tobago are not formally structured in this manner)

2.4 S3–5: Industry Cohesion, Intelligence and Governance Process

The Fashion Industry is driven by government policy which fulfils the S5 function to a large extent within the VSM Model. However, there appears to be limited cohesion (S3) and collective industry intelligence gathering or strategic initiatives for the industry (S4). It should be noted, however, that although the S4 function is not strong, the policy mandates at the S5 level are present and do drive elements within the S4 level. The creation of a body that has an overall responsibility for the execution of Governments' policy for the Fashion Industry, namely FashionTT, is a strong and, in the analysis presented in this strategy document, a critical element for making the Industry viable once the actions this body takes and promotes are providing the systemic viability functions that are currently missing.

The lack of cohesion in the industry has contributed to a lack of adaptability and coordination amongst and between the sectors within the Industry as well as the limited exploitation of the Global Fashion Value Chain. In order for the Status Quo to be changed, the support network for the Fashion Industry must be strengthened. For the purposes of the Strategic Plan, the support network is defined using the International Trade Centre's framework for export and include the following dimensions:[42]

- **'Border-In' Support**: Capacity and Competency Development activities
- **'Border' Support**: Policy development, Infrastructure, Trade Facilitation and Ease of Doing Business activities.
- **'Border-Out' Support:** Market Access, In-Market Support and National Promotion support
- **'Developmental' Support**: Poverty Reduction, Employment, Regional Development and Environmental Sustainability activities

The table below provides a listing (whilst comprehensive it is not exhaustive) of the agencies which comprise the Fashion Industry support network and a high level indication of the support function within the industry.

Table 7:Support Institutions

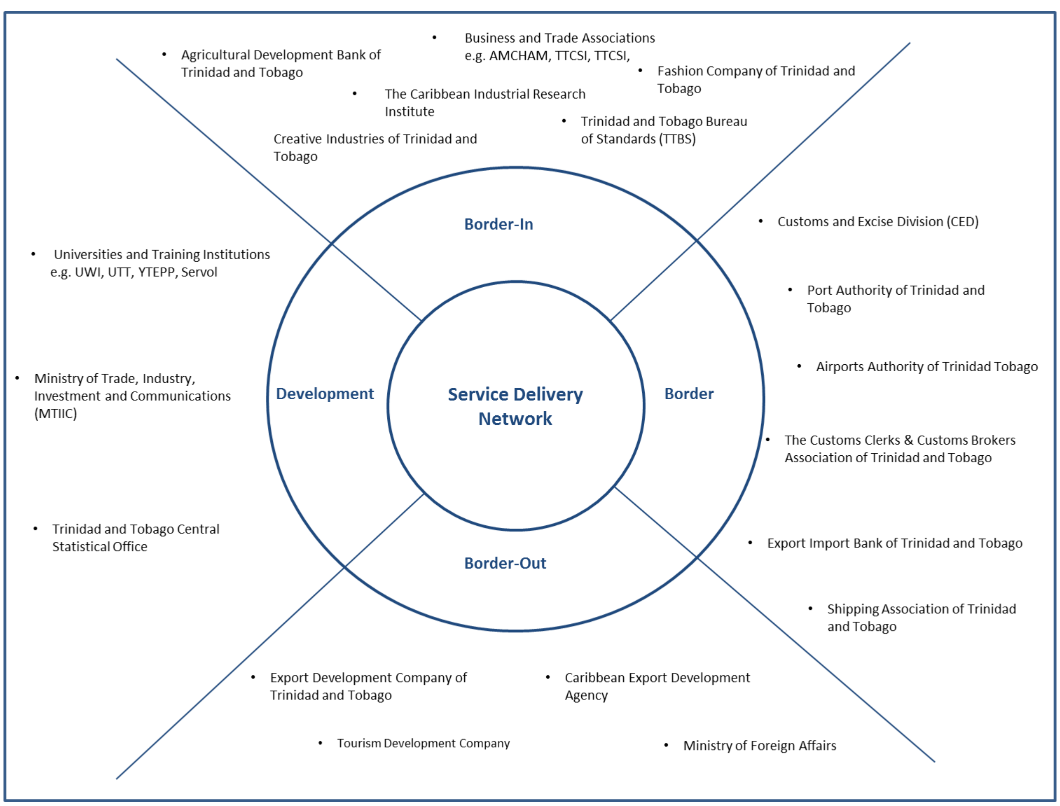
Institution	"Border-In"	"Border"	"Border-Out"	"Developmental"
KEY MINISTRIES / TOBAGO HOUSING AUTHORITY (THA)				
1. Ministry of Trade, Industry, Investment and Communications	✓	✓	✓	✓
2. Ministry of Labour and Small and Micro Enterprises	✓			✓
3. Ministry of Foreign Affairs	✓			✓
4. Ministry of Tourism	✓		✓	✓
5. Ministry of Tertiary Education	✓	✓		
6. Ministry of Community Development - Export Centres Company Limited	✓	✓		✓
7. Ministry of Tobago Development s				✓
8. Tobago House of Assembly – Business Development Unit		✓	✓	✓
9. Ministry of Finance and the Economy	✓	✓		✓
10. Ministry of Public Utilities – Trinidad and Tobago Postal Corporation	✓	✓	✓	
NATIONAL AGENCIES				
11. Trinidad and Tobago Bureau of Standards	✓	✓		✓
12. Export Development Company of Trinidad and Tobago	✓	✓		✓

[42] International Trade Centre (ITC). 2011. National Trade Policy for Export Success. Geneva. http://www.intracen.org/national-trade-policy-for-export-success.pdf.

13. National Entrepreneurship Development Company Limited	✓	✓	✓	
14. University of Trinidad and Tobago	✓	✓	✓	
15. University of the West Indies, St. Augustine	✓	✓		
16. Investment Company of Trinidad and Tobago	✓	✓		
17. Youth Training and Development Programme			✓	
18. Export Import Bank of Trinidad and Tobago			✓	
19. Tourism Development Company				✓
20. Venture Capital Companies			✓	
21. Customs and Excise Division				✓
22. Trinidad and Tobago Creative Industries Company Limited	✓	✓	✓	✓
23. Trinidad and Tobago Fashion Company Limited	✓	✓	✓	✓
24. Metal Industries Companies Limited	✓	✓		
25. National Training Agency	✓	✓		
26. The Caribbean Industrial Research Institute	✓	✓		
27. Council of Competitiveness and Innovation	✓	✓		
28. Economic Development Board	✓	✓		
29. Caribbean Center for Innovation	✓	✓		
BUSINESS ASSOCIATIONS				
30. Trinidad and Tobago Chamber of Industry and Commerce	✓	✓		✓
31. American Chamber of Industry and Commerce of Trinidad and Tobago	✓	✓		✓
32. Trinidad and Tobago Manufacturers Association	✓	✓		
33. Trinidad and Tobago Coalition of Services Industries			✓	
34. Caribbean Export Development Agency		✓	✓	✓
35. The European Business Chamber in Trinidad and Tobago		✓	✓	✓

Of the institutions identified in the table above, several are key stakeholders which form part of the Fashion Industry Service Network as shown in the Figure 19 below. Specifically, these institutions are key players to the industry's export and trade support services.

Figure 17: Trinidad and Tobago's Fashion Industry Service Delivery Network.



There appears to be considerable overlap in the mission, objectives and activities of many of these agencies resulting in duplication of efforts, fragmentation of services provided and lack of full-cycle end-to-end support. Each agency tends to focus on the issues that are part of their mandate as well as those outcomes that are in the short to medium-term.

Particular attention should be placed on assessing the coordination and collaboration requirements amongst these institutions to ensure adequate support is available to members of the various sectors within the Fashion Industry.

2.5 SWOT – The Industry Viability Assessment

The analysis of the Trinidad and Tobago Fashion Industry as presented above indicates that there is much potential, that there are opportunities, that many of the organizations have organizational weaknesses, that there are also threats, but that the most critical aspect from an industry perspective is that systemic functions are missing and this results in the conclusion that the industry is not viable within its present state.

The summary results of the analysis are presented in the tables below with a detailed SWOT assessment included as Appendix 4:

Industry Weaknesses	**Industry Threats**
× New entrants lack the level of technical training to ensure quality standards × Depletion of skilled technical labour as a result of exits from the industry × Low work ethic, productivity and focus on quality within the available labour pool × Challenges for firms to identify partners and suppliers who produce similar quality products / work × Limited access to quality fabrics and trimmings × Lack of a functional and structured service support network × Low manufacturing capability to fill large orders × Limited access to funding and overall financial support (especially for new and emerging designers) × Difficulty in sourcing low-cost high-quality raw materials and accessories × Lack of coordinated full-cycle training programme	× Increasing availability of affordable fashion products × Emergence of competing cultural and ethical fashion brands globally × Mass designer production of Caribbean inspired designs × Competition from regional players × Large volumes of imported clothing × Competition/rivalry and a resistance to creative collaboration within the industry × Globalisation of production systems × Increase use of technology for production and distribution

However, the analysis has also signaled the existence of several strengths and opportunities that can be harnessed to increase industry viability.

Strengths	Opportunities
✓ High level Government policy focusing on strengthening local industry ✓ Passionate and skilled designers ✓ High level of creativity and innovation ✓ Trained pool of workers in garment construction ✓ Presence of support institutions (though there needs to be some strengthening and increased coordination)	✓ Increased sales through stronger linkages with related industries such as Mas, Film and Tourism ✓ There is demand for resort wear / Caribbean inspired products ✓ Harnessing local creatively to create brands that are unique and recognizable ✓ Increase in collaborations amongst designers to exploit synergies and economies of scale ✓ Focusing on niche market segments ✓ Opening up a local fashion retail space exclusive to local designers. ✓ International shows for overseas for both sales exposure and partnering opportunities

In order for Trinidad and Tobago's Fashion Industry to participate in the global Fashion Industry on a larger scale, an understanding of the main drivers shaping tomorrow's Fashion Industry is required.

Figure 18: Main drivers shaping tomorrow's Fashion Industry

Source: Reis, Michele, and Ian Ivey. 2008. "Fashion Advanced Sector Foresight Project: Best Bet Investment Opportunity Cases." Niherst.Gov.tt. http://www.niherst.gov.tt/resources/publications/fashion-advanced-sector-foresighting-project.pdf.

Additionally, there are consumer trends, demographic shifts in population and technological and resource changes that have salience for small country players like Trinidad and Tobago. Many of these developments were examined in the context of Trinidad and Tobago (NIHERST: 2007). Some key ones are listed below.

a. Technology and Resource Shifts

- ➔ Biology and technology are increasingly being merged to create new products
- ➔ This involves a convergence of material science, ICT, micro-electronics and fashion design.

b. Demographic Shifts

- ➔ Ageing populations or 'Old Gold' Fashion which offer new opportunities to design for elderly (adaptive clothing)
- ➔ Designing with the elder consumer in mind-less mobility, technology being applied even for this demographic, e.g. RFID chips in clothing to locate people with Alzheimers
- ➔ In terms of US market, fastest growing ethnic group in the US - Hispanics
- ➔ Different tastes and influencing trends.

c. Consumer Trends

- ➔ Markets of one - catering to individual needs rather than the mass marketing concept.

d. Technology Trends

- ➔ Environment adjusting materials
- ➔ Electronic and ICT-based smart materials

What the analysis has shown is that markets that used to provide the largest employment in the sector, outsourced manufacturing in Trinidad and Tobago (and the region), have moved to different parts of the world (mostly Asia). New opportunities have arisen, but the Industry has not been able to take advantage of these. The core strategic challenge for the Trinidad and Tobago Fashion Industry is therefore to become viable and as a result, which is the most important: competitive.

Chapter 3

Strategic Options

CHAPTER 3- Examining Strategic Options for the Trinidad and Tobago Fashion Industry

3.1 The Core strategic issue

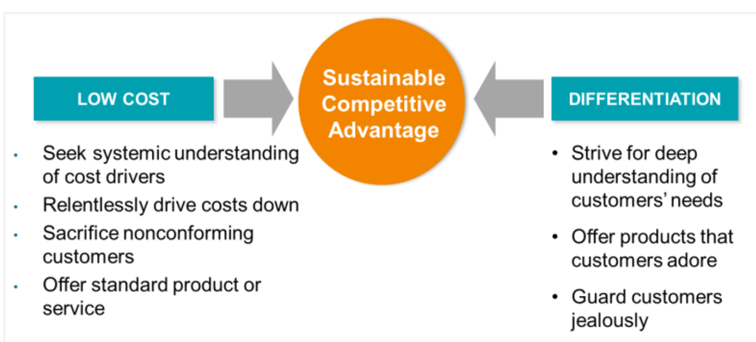
The key challenge faced by the Fashion Industry of Trinidad and Tobago is a ***decline in competeviness*** at the national, industry and firm level.

- ➔ We have seen a global shift in production locations to Asia together with globally distributed value chains
- ➔ The structure of the Fashion Industry across the Caribbean has changed – much lower importance of larger scale production in export zones
- ➔ Rise of the Fashion Industry in Latin America – both supply and demand
- ➔ Decrease in employment in Trinidad and Tobago (as well as rest of Caribbean)
- ➔ Decreasing productivity and increased skill shortage

=> Therefore, the core strategic issue is **increasing competitiveness**

At a strategic level, there are only two ways to create a sustainable competitive advantage:

- ➔ **To be a low-cost player** - operate with sustainably lower costs
    - Provide a standard product or service that they make as cost-effectively as possible. They focus on driving costs out of the system. They don't try to serve customers who want something other than their standardized products or who seek additional, expensive bells and whistles.
- ➔ **To be a differentiator** - differentiate by offering a significantly better product or service
    - Companies that compete on differentiation provide products or services for which customers are willing to pay a premium over competitive offerings. To do so, the companies seek to deeply understand customers and their unmet needs, doing whatever it takes to delight those customers over the long term.
    - Differentiation may be based on the product quality, branding, breadth of offerings, customer service, and so on.

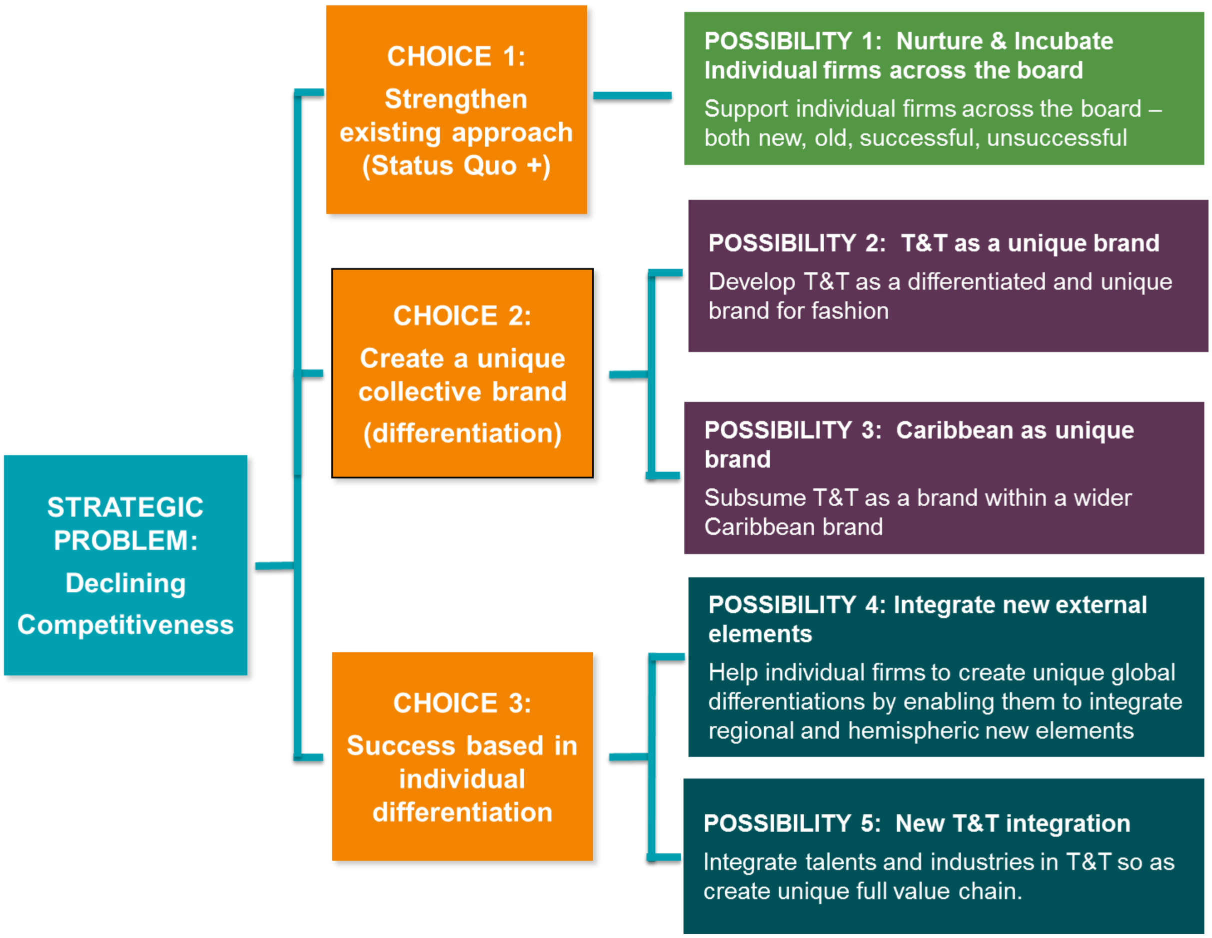


Source: Lafley[43]

[43] Lafley, A G, and Roger L Martin. 2013. Playing to Win. Boston, Massachusetts: Harvard Business Review Press.

3.2 Strategic Choices and Possibilities

Through the analysis of the data provided and dialogue with the Consultative Group, five strategic possibilities for increasing competitiveness were developed- as presented below:



The first choice is to enhance the current (status quo) approach. A key feature of this approach is that all organizations (established, new, successful and unsuccessful) are supported across the spectrum. A key feature of the support is to spread the support wide and not to repeat support systematically for those who are proving to be successful.

In other words, rather than supporting the most promising industry members even more when they are already showing signs of success, support is instead spread as wide as possible as with the belief that any player might be lucky to break through, and those with more proven success can make it on their own, so that there is no need to support them further, or it would be 'unfair' to support them further when others have not yet received support.

A second choice is to create competitiveness based on differentiation through the creation of a unique collective brand for Trinidad & Tobago. Within this choice two possibilities have been developed:

i. Creation of a Trinidad and Tobago brand which focuses on harnessing the uniqueness of the Trinidad and Tobago diaspora.
ii. Creation of a Trinidad and Tobago brand which is subsumed within the wider Caribbean brand.

The third broad choice is to focus efforts on creating success through individual differentiation and success. Two possibilities for choice three have also been identified:

i. Integrate new external elements through the strategic use of the global value chain. A key feature of this option is the provision of support to individual firms to create a unique global differentiation by enabling them to integrate regional and hemispheric new elements
ii. Create a unique full value chain though the integration of local elements (talents and industries)

Further details of elements and scope if each possibility is highlighted in Figure 21 on the following page.

Each possibility has both attractive elements as well as limitations to success. In order to make an informed decision regarding the most attractive possibility, the Consultative Group considered the dimensions outlined in Figure 191 below when they evaluated the relative desirability of the different possibilities.

Figure 19: Key considerations for choosing way forward

Topic for Consideration	
• Multiplier Effect – as high as possible	• Role of organisations – Support Institutions
• Employment – as high as possible	• Role of GoRTT
• Finance – Investments as low as possible	• Policy Change required
• Finance – Revenue Generation for companies has high as possible	• Dependency on the Collective Effort
• Export Capability – foreign exchange earnings	• Robust Industry (not subject to individual actions)

These dimensions were assessed in relation to the following elements and a discussion around the trade-offs of each possibility.

➔ **Industry:** *Segments and Structure*
➔ **Consumers**: Channels and End Customers
➔ **Relative Position**: Capabilities and Cost
➔ **Competition**: Competitor Reaction

An overview of the assessment criteria used to determine the most viable possibility immediately follows Figure 22.

Figure 20: Consolidated Strategic Options and Possibilities Overview

	Strategic Option 1 - Strengthen existing approach (Status Quo +)	Strategic Option 2 - Create a unique collective brand (Differentiation)		Strategic Option 3 - Success based on individual stakeholder differentiation	
	Strategic Possibility 1 - Nurture and Incubate Individual Firms Across the Board	Strategic Possibility 2 - Trinidad and Tobago as a Unique Brand	Strategic Possibility 3 - Caribbean as a Unique Brand	Strategic Possibility 4- Integrate New External Elements	Strategic Possibility 5 - New T&T Integration
What is our winning Aspirations	Be a player in the international market through internationally recognized local firm (e.g. Sasha Cosmetics)	Development of the T&T National Brand that focus on local attributes	Establishment of a Caribbean brand that speaks to the Caribbean aesthetic	Integration of new external elements within the fashion value chain & Caribbean Attitude Brand	New combination of all local elements into the fashion value chain
Where will we play?	- For younger (18 – 35 years) ethnic /different - For leisure - Professional men and women 35 – 55 years olds - Caribbean aesthetic	Essentially same as Status Quo	Essentially same as Status Quo	Essentially same as Status Quo	Essentially same as Status Quo
How will we win?	- Differentiation / exclusivity based on individual brands - Caribbean uniqueness - Pride in locally made quality and quantity - Individual firm capabilities	- Differentiation through uniqueness and pride in quality leveraging T&T brand - Incorporate event (sports, beauty, carnival/mas, cultural etc. into brand	Differentiation through uniqueness and pride in quality developing a Caribbean Brand and focusing " Caribbean Aesthetic / Attitude"	- integration of new external elements (esp from Latin America) within the fashion value chain. Caribbean Brand and focusing " Caribbean Aesthetic / Attitude + global standards with aesthetic stories (price & eco assurance)	Exploit opportunities provided by local resources, culture, skills to enhance fashion products and promote national uniqueness.
What capabilities must we have?	- Strong direct marketing capability - Company brand: person-based brand - Production of high quality products (as individual players	- Strong national alignment around central theme - Strong international advertising - Strong national brand based on cultural products such as the steelpan, carnival, etc	Strategic promotion of Caribbean aesthetic/attitude aimed at increased international market penetration and market share	Identification and exploitation of external elements to integrate at the different aspects of the fashion value chain - International sourcing and production	Identification and exploitation of local elements to integrate at the different aspects of the fashion value chain
What Management Systems do we need?	Targeted assistance from support institutions and increased internal capacity of established firms	Strong alignment of industry players around central theme focused on national brand	Stronger collaboration, marketing/positioning, distribution and supply chain of focused on Caribbean aesthetic	Strong research and development capabilities to identify external/ international elements to incorporate in local design, production and distribution	Strong research and development capabilities to identify internal elements to incorporate in local design, production and distribution.

Figure 21: Barriers, challenges, concerns, strategic challenges

		Possibility 1	Possibility 2	Possibility 3	Possibility 4	Possibility 5
		Nurture and Incubate Individual Firms Across the Board	**Trinidad and Tobago as a Unique Brand**	**Caribbean as a Unique Brand**	**Integrate New External Elements**	**New Trinidad and Tobago Integration**
Industry	**Segments**		• Cohesive brand	• Challenge of cohesive Caribbean brand		• Challenge to bring all sectors together
	Structure				• Lack of a facilitative environment and coordination of all agencies	
Cus	**Channels**	• Sustainability		• e-commerce		
	End Customers		• Brand unproven		• Local or international clients	
Relative Position	**Capabilities**	• Value chain • Quality • Production	• Buy-into and support "Brand Trinidad and Tobago" • National solidarity / patriotism • Conflicts in personalities / personal interests • Lack of compromise & collaborative effort • Division of Fashion Industry players	• Governments collaboration • Lack of production capacity • Having a Caribbean brand – collaboration • Various industries unified	• Sale – production ration for profitability • Re-engineering our existing capabilities • Increased Collaboration between agencies Increase in R&D e.g. international production	• Lack of production capability • Lack of workforce capacity e.g. compare with the Chinese/Asian labour re: productivity levels • Low quality
	Costs	• Disharmony • Funding • Material costs	• Cost of paradigm shift is prohibitive	• Collectively develop a unified vision for a Caribbean brand • Overcoming differences	• R&D and cutting edge technology costs	• Product that can compete with imported garments • Higher Labour costs - skilled enough • High set up costs
Competitor	**Reaction**	• Cheaper imports		• Strong competition from C.A. and S.A. • Resistance for country brands e.g. Jamaica/Barbados	• Bigger pool – more international competition • External production may mean decrease in indigenous feel/production	• Increased collaboration & trust would be required • Proper agreements

Source: Consultative Group members (RED indicates barriers or challenges whilst BLUE indicates perceived opportunities)

3.3 The way forward: Integration of New External Elements in order to increase competitiveness

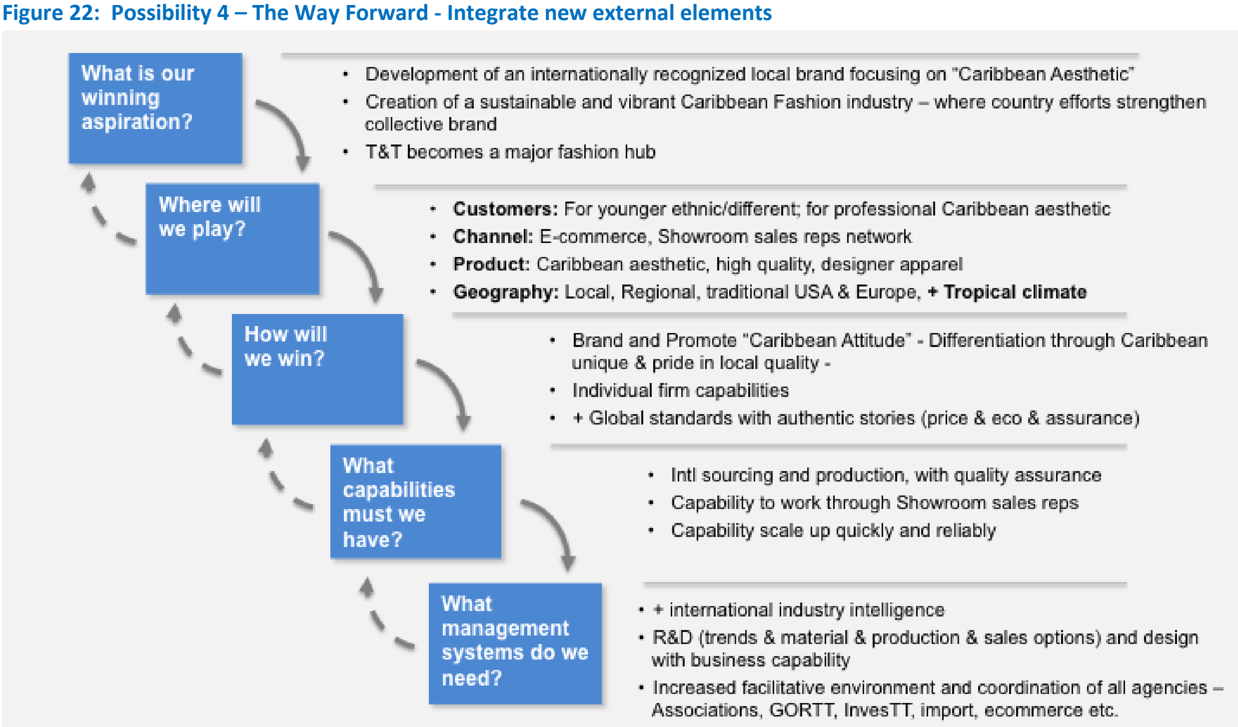
On the basis of the in-depth analysis, the selected strategy is ***Option 4 – Integration of New External Elements****.* This option speaks to creating differentiation by combining external elements with the elements of the local industry. It provides the greatest opportunity for the Fashion Industry to address the current decline in competitiveness, strengthen the capacity of players to participate in the international market and increase growth and revenue at the national and firm level.

Overall **Possibility 4** is considered to be most favoured because the likelihood of achieving the benefits, outweigh the probable risks by the greatest extent.

Further, the Consultative Group also agreed to integrate a component of Possibility 3 namely, the ***Development of a Unique Brand*** into the strategy. In designing the strategy and defining the brand, it is noted that it was a strongly held belief by the Consultative Group that there is no strong desire to create a national Trinidad and Tobago brand. Rather, the general consensus is to focus and develop a brand that was anchored in the "***Caribbean Aesthetic***". It was agreed that it would be more difficult to compete on the international market with a Trinidad and Tobago brand versus the much more established and/or easily recognizable Caribbean Brand.

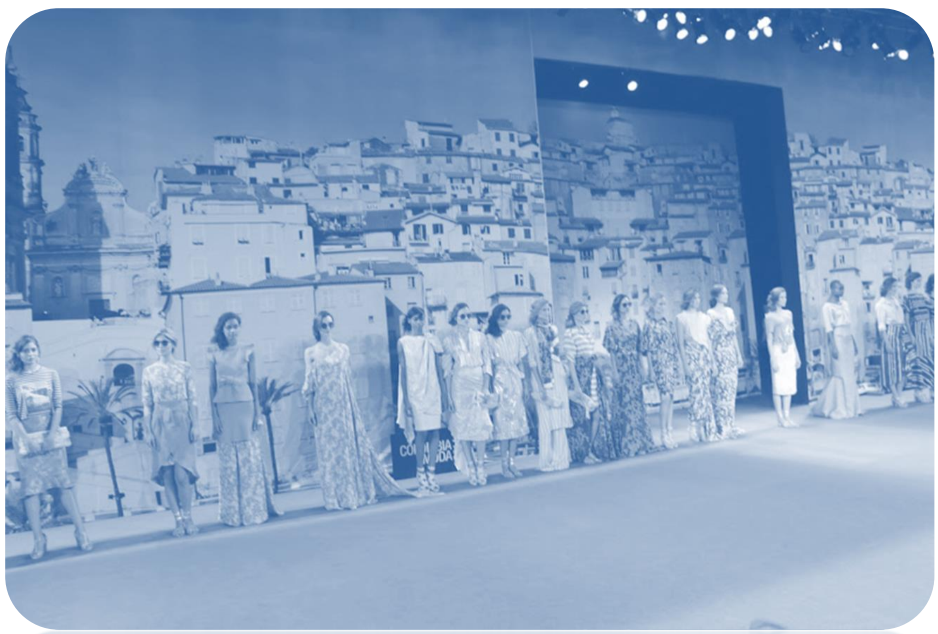
This is discussed further in Chapter four.

Figure 22: Possibility 4 – The Way Forward - Integrate new external elements



Chapter 4

Strategic Plan



CHAPTER 4- The Strategic Plan for the Fashion Industry of Trinidad and Tobago

In the previous chapter we examined alternative strategic choices and possibilities for the Fashion Industry and outlined the analysis that lead to the choice of developing the competitiveness of the Trinidad and Tobago Fashion Industry through the addition of new external elements. In this chapter we begin by re-stating the strategy succinctly.

4.1 The Strategy Formulated: Objectives, Advantages, and Scope

Objectives - The Ends that the Strategy is designed to achieve:

Over the next five (5) years we will have two (2) firms in the Fashion Apparel sector that are internationally recognized through their sales volume of more than TTD $10 million (currently the largest annual sales volume for an individual firm is approximately TTD $2 million). The Fashion Apparel Sector would have a strengthened base that has an improved local and regional sales of collectively approximately TTD $75 million (up from its currently approximated value of TTD $57 million). In addition to increased sales volume the industry would have increased the pool of companies that have increased their level of company maturity. Trinidad and Tobago will be experienced regionally as a fashion hub on the basis of an aligned Fashion Industry where developments of the sectors and support organizations and events are coordinated in systematic way. Trinidad and Tobago will increase its local and regional impact, as well as its local, regional, and International visibility by branding the developments in the Fashion Industry as being part of and promoting a Caribbean Aesthetic. The end results that will be achieved are increased foreign exchange and an increase in sustainable & meaningful employment.

Advantages - The advantages will we use compared to others (The means through which ends will be achieved):

The Caribbean, as a region, has high brand recognition around the world, but this potential has not yet been captured or utilized for the Fashion Industry. The strategy seeks to enable 2 firms to become noted Fashion Industry participants outside of the Caribbean. The strategy therefore seeks to utilize all of the brand capital that has been, and continues to be, built up for the Caribbean and to add a specific fashion dimension to it, by creating the category of "Caribbean Aesthetic" which is intentionally broad enough to capture the diversity that is the essence of the Caribbean and at the same time to add an authenticity and pride dimension that captures the imagination of international market players.

A key feature of the global market system is the fragmentation of the value chain. Fashion Industry players in the Caribbean have made use of outsourced production for local or regional consumption on occasions where higher volumes are needed. The strategy seeks to utilize the untapped potential of sourcing in Latin America, creating and designing locally and then producing and fulfilling orders through outsourcing in Latin America. This concentrates local efforts on the highest value adding parts of the value chain and allows larger orders to be produced and shipped, meeting production quality and order fulfillment expectations of international buyers.

The initial driving force towards increased competitiveness is achieved through outsourcing and utilizing the Global Value Chain, leading to a higher value proposition (quality at better price and terms). Increased success of firms leads to increased local and regional visibility as well, coupled with lower priced high quality products available locally (due to higher volumes and lower production costs) demand is stimulated and coupled with the "Caribbean Aesthetic" brand campaign, and aligned or coordinated industry players, Trinidad and Tobago is becoming the regional fashion hub and the local Fashion Industry firms will benefit – as do other sectors like Mas, Carnival and Music. Creating strong brand visibility locally, regionally, and internationally is important in order to "harness" the 'pull factor' that the larger international volume firms will create for other members of the industry.

The core strategy contains three interdependent and one enabling factor(s): differentiated support for and investment in the three fashion sectors, branding for visibility that spans all three sectors but where the focus is on Fashion Apparel and Accessories internationally (and local awareness), support for firms and associations. The key enabling feature of the strategy is effective good governance of the sector.

The strategy is not to grow the industry through artisanal or export zone production growth. Instead, the artisanal part of the sector will grow as a result of leading designers and producing through company brands that are internationally known with sales several orders of magnitude larger than currently possible.

Scope - The niches for industry to operate in:
In the first instance the focus is the same markets as have been targeted thus far (Caribbean, USA and Europe). The differences are only (i) on the differentiators used to compete in those markets (higher volumes, tighter production and quality specification, at lower prices, with increasingly stronger collective brand presence and individual authentic stories); (ii) channels through which sales are being sought – moving from direct sales to an increased utilization of intermediaries so as to achieve higher volumes and keep the focus on the highest value part of the value chain: design

4.2 What is different? Comparing Status Quo versus Desired Future State

At present, the structure of the Fashion Industry does not foster development and capacity strengthening of the sector as a whole. Rather, because the system is missing key elements of viability, the industry is fraught with fragmentation amongst the players within the value chain, duplication of efforts, provision of uncoordinated ad hoc services and little or no sector policy to guide its development.

Fashion Industry firms are largely focused on the financial sustainability of their individual businesses and support agencies typically operate in isolation with little or no collaboration with regard to the scope of services they provide or consistency in the delivery of services.

In order to achieve the desired future state for the Fashion Industry there is a need to alter the current areas of focus and emphasis, as well as to add a few essential elements that are currently missing.

The movement from the present configuration and emphasis to the future state requires shifts in fundamental assumptions within the industry. For this option to be successful:

- organizations within the various sectors will need to excel in their use of the global fashion value chain
- there needs to be a strong base to support the pipeline
- firms must be successful enough to create an up-ward pull or vacuum for others within the industry.

Figure 23: Comparing the Status Quo Strategy with the Way Forward (the new strategy)

	Status Quo	Way Forward
What is our winning aspiration?	• For T&T to be a player in Intl Fashion Industry • Turn around declining industry • Local companies to be internationally known	• Development of an internationally recognized local brand focusing on "Caribbean Attitude" • Creation of a sustainable and vibrant Caribbean Fashion industry – where country efforts strengthen collective brand • T&T becomes a major fashion hub
Where will we play?	• **Customers:** For younger ethnic/different; for professional Caribbean esthetic • **Channel:** Direct marketing and distribution, with local and regional boutiques • **Product:** Caribbean aesthetic, professional, designer apparel • **Geography:** Local, Regional, traditional USA & Europe, with some Asia	• No change very necessary because existing markets and segments still hold a lot of unsatisfied demand. Only suggestion is to add start focusing also on other Tropical climate countries.
How will we win?	• Differentiation through Caribbean unique & pride in local quality • Individual firm capabilities	• Brand and Promote "Caribbean Aesthetic" - Differentiation through Caribbean unique & pride in local quality - • Individual firm capabilities • + Global standards with authentic stories (price & eco & assurance)
What capabilities must we have?	• Direct marketing • Company brand • Products of high quality	• Intl sourcing and production, with quality assurance • Capability to work through Showroom sales reps • Capability scale up quickly and reliably
What management systems do we need?	• Individual company capability for full value chain production • Collective support for players to succeed	• + international industry intelligence • R&D (trends & material & production & sales options) and design with business capability • Increased facilitative environment and coordination of all agencies – Associations, GORTT, InvesTT, import, ecommerce etc.

Figure 24: Specific Transformations Required

FROM (Current State)	->	TO (Future Desired State)
Seeking differentiation through all stages of value chain	->	Differentiation by purposefully integrating really new elements or processes into the production
Fragmented Industry	->	Integrated System through much increased coordination and policy capacity
Seeking workarounds for debilitating Environment	->	Transforming blockages and creating an enabling environment
Focus on individual players, esp. designers	->	Focus on sector as a whole and common interests
Primarily serving local market	->	Increase penetration in international market
Government sponsorship	->	Encouraging firm level sustainability
Aspiring for full local value chain (all stages)	->	Towards new sourcing and production locations (esp. Latin America)
Trinidad & Tobago focused thinking & brand aspiration	->	Regional and international with "Caribbean Aesthetic" Brand (Trinidad and Tobago subsumed)
Rotation of support to individual firms	->	Sustained support with increased accountability
Focus on own institutional activities	->	Collaboration and integration with existing efforts
Emphasis of glamour and design	->	Emphasis of craft, development, and business

4.3 Key features of the "Global Value Chain Strategy", including strategic objectives

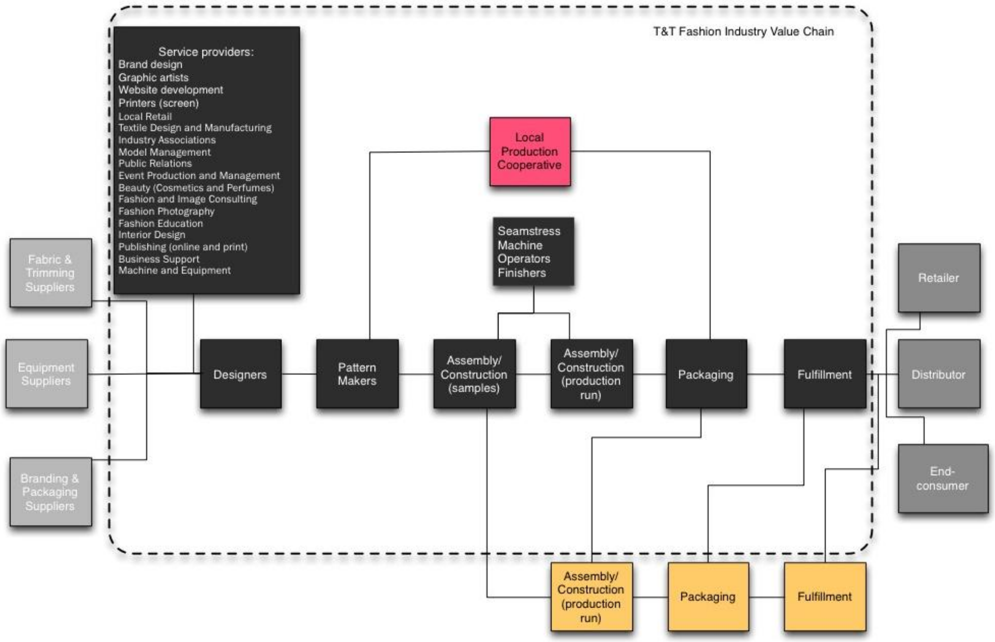
The previous section highlighted the significant difference between the status quo approach and the new strategy.

Before outlining the specific strategies and measures for each programmatic area through which the new strategy is to be achieved, we highlight three aspects that are absolutely essential and around which the programmatic strategies are built. These are:

4. *Transformation of the Value Chain (Global and Local)*
5. *Development of the industry through the implementation of six (6) programmatic areas*
6. *Aligning the Strategy against pre-defined Criteria*

4.3.1 Transform the Value Chain

Figure 25: New Fashion Value Chain - including GVC and Local Outsourcing through Cooperative



To increase the viability of the industry, there is the need to fully exploit the Global Fashion Value Chain. This will be done through concentrated efforts and direct support to firms/ designers that are considered export-ready. Additionally, efforts will be placed to augment the local value chain through the development of a local Cooperative designed to focus the capabilities of several firms simultaneously in order to benefit from economies of scale, design and production skills and technical expertise.

4.3.2 Develop the Industry as a viable system through six programmatic areas

As highlighted in Chapter 2 – Situational Analysis, changes have and are continuing to take place in the Fashion Industry globally. The local industry has not been able to adapt as an industry to take advantage of the opportunities that have emerged – to a large extent because the Industry, as a system, lacks important features that would make it able to adapt, to make it viable.

In order to transform this, the new strategy is designed to build the requisite elements and will be done through the following **six Strategic Programmes** (that align with the Viable System Model dimensions).

1) **P1A**: Improve Market Access
2) **P1B**: Innovate Organizations & Operations

3) **P2**: Assure Sector Coordination & Support
4) **P3**: Well governed Strategic Investments
5) **P4**: Institute an Industry Intelligence and Innovation Function
6) **P5**: Actively Manage the Industry Strategy and Governance Process Policy

Each Strategic Programme has a number of Principal Strategies through which they are to be achieved. These are presented in the Section 4.4 below.

4.3.3 Strategic Alignment Criteria – Everything must be aligned around a few key criteria for the strategy to work

In order to align the focus and work with the greatest amount of cost efficiency and effectiveness, all Principal Strategies within the six Strategic Programmes need to be designed so as to achieve a few essential Strategic Alignment Criteria. The following are the Strategic Alignment Criteria that fall within the benefit category – all Principal Strategies need to perform as high as possible on these criteria (that is, they need to maximize).

Alignment Criteria:

- ✓ **Viability**: To what extent does the Principal Strategy support the establishment of viable system elements? Not all programmes have an equally big or direct impact on Viability and what will be reflected in the weighting system.
- ✓ **Large Export Lead:** to what extent does the Principal Strategy promote the conditions of success for 2 firms from Trinidad and Tobago to succeed to achieve several orders of magnitude greater sales internationally?
- ✓ **Growth Linkage**: to what extent does the Principal Strategy contribute to or provide the linkage and boundary that ensure that if Trinidad and Tobago has two companies that really grow and lead through exports, there will be the pull for the others, and even in related sectors. The linkage is not about the two companies, but about how much others would grow if the two are successful because of the created linkage factor.

Section 4.5 introduces also, the *Cost criterion* that needs to be minimized, and the *Probability of Success criterion* that needs to be 'maximized'.

- ✓ **Depth & Strength**: To what extent does the Principal Strategy support the development of a wide 'pipeline' of designers – different stages of development and different target markets and styles. This is explicitly not considering the impact on the 2 high GVC exporters.

4.4 Strategic Programmes and their Components

In this section, the strategy is presented in greater detail – building on the strategy as formulated in Section 4.1. – with a Strategic Direction Statement for each of the Strategic Programmes defined. The Strategic Direction Statements are like vision statements for each programme.

Following the Strategic Direction Statement, the detailed strategic objectives are presented as well as the Principal Strategies through which the programmes are to be achieved. Every programme also has performance measures that are stated both in output and outcome terms.

For each principal strategy we then present:

1. **A description**: This outlines the principal strategy verbally
2. **An Action Plan**: The principal strategy is expanded to include the measure through which it is to be practically implemented, performance indicators (outcomes and outputs), the baseline from where we are starting, the targets to achieved over the five years, which organization is to take the lead and which are the main support organizations, and the investment required on an annual basis as long as the principal strategy is being executed.
3. A **draft procurement plan**
4. A **draft monitoring & evaluation plan**
5. A **draft outline of the main tasks by project stage** to give an indication of the work required and to facilitate the writing of terms of reference or other documents where applicable
6. A summary of **Critical Success Factors** for the particular Principal Strategy
7. Options for **Scaling-up or Down** in the event are there more or less resources available than originally anticipated

This level of detail is helpful because it facilitates preparation for execution – which is the most important stage in the strategy process.

4.4.1.1 P1A. Improve Market Access - Market Access and Facilitation for Sales

Strategic Programmes For industry viability

1. Improve Market Access
2. Innovate Organizations & Operations
3. Assure Sector Coordination & Support
4. Well governed Strategic Investments
5. Institute an Industry Intelligence and Innovation Function
6. Actively Manage the Industry Strategy and Governance Process Policy

Programme Direction Statement (Outcomes & Impacts)

In addition to the current support for individual fashion apparel sector firms to access fashion shows for sales and to participate in trade missions for sales, we will also focus on systematically enabling access to trade shows in Latin America for all fashion industry sectors for sourcing of materials and the development of production partnerships. We will also improve market access for the fashion industry collectively by developing a "Caribbean Aesthetic" brand identity that will benefit from the wide global brand awareness of the wider Caribbean and that will bring that benefit to the fashion industry. In order to also facilitate smaller international transactions we will strengthen the efforts to enable Trinidad and Tobago entrepreneurs to be able to receive electronic credit card payments

Strategic Objective

Broaden and deepen market access for individual firms of all fashion industry sectors, while building a collective brand, and eliminating the Trinidad and Tobago e-payment hurdle for trade

Principal Strategies

1. Develop "Caribbean Aesthetic" brand
2. Market access for sales
3. Market access for sourcing
4. Allow e-payment transaction

Performance Indicators

Outcomes: diversity of sourcing locations, production partnerships, increased sales, **Outputs**: number and consistency of qualified participants, targeted brand visibility, e-payment volume

Market access facilitates the need to extend beyond supporting firms to attend fashion shows in order to primarily promote sales. It needs to include market access in order to diversify sourcing options so as to include new and interesting and attractively priced material inputs as well as establishment of production and distribution partnerships.

Firms or designers who receive the recommended sustained support (3 years) need to be screened rigorously to establish what kind of support is right given their evolutionary stage. The criteria need to include their sales volume, quality of work, and market experience. Selection needs to be done transparently and independently.

The collective brand development function is a very significant project component and is a crucial element of the strategy because without it the collective mobilization of the Fashion Industry is far less likely to happen.

4.4.1.1.1 S1. Enable E-Business Operations

Full Title	S1. Enable E-Business Operations
Short Title	S1. E-Payments
Strategic Programme	P1A. Market Access
Description	Many of the smaller Fashion Industry firms would benefit from enabling their clients to pay by credit card instead of international money orders or bank transfers. At present this is not possible because banks do not allow the online processing of credit cards in Trinidad & Tobago. Only payments through Paypal are possible at the present time, but many firms do not have company credit cards and therefore that avenue is blocked as well. The aim of this project is to lobby the Bankers Association and support the other already ongoing initiatives in this domain. This project is designed solely as a communication and lobbying project and banking process transformation is not expected to be accomplished through this work. TTCSI is proposed to be sole selected as executing agency for this project as this issue is of critical importance for all service industries of Trinidad and Tobago.

Action Plan

Objective	Principal Strategies & Measures	Performance Indicator (Outcomes)	Performance Indicator (Outputs)	Baseline Data	Target			Lead Organization	Support	Investment (annual TT$ '000)
					Year 1	Year 2	Year 3-5			
O1. To increase global reach of local firms through the improvements of e-business transactions /e-commerce	**S1. Enable E-Business Operations** Collaborate with commercial banks to allow e-payment system	Online credit card payment introduced in Trinidad and Tobago	- MOU with commercial banks - Number of banks to sign MOR and allow e-payments	- Online credit card processing not possible in Trinidad and Tobago (only transactions through Paypal and other progs)	0	50%	100%	MTIIC	TTCSI & FashionTT	

Procurement

Item description	Month when needed	Quantity	From where to buy?	Estimated cost ('000)	Procurement Method	Procurement Schedule				
						Advertise	Submission of Bids	Bid Evaluation and recommendation approval	Contract award	Delivery
Professional services	June '15	1	TTCSI	50	Sole Select				June '15	June '16

Monitoring & Evaluation

Priority Policies, Programmes and Projects	Goal(s)	Expected Outcome(s)	Evaluation Type (Frequency)	Planned Evaluation Completion Date (mm/yy)	Evaluation Method(s)	Entity Responsible for Evaluation
Enable E-Business Operations	Broaden and deepen market access for individual firms of all Fashion Industry sectors, while building a collective brand, and eliminating the Trinidad and Tobago e-payment hurdle for trade.	Online credit card payment possible in Trinidad and Tobago	Annual	June '16	Report by TTCSI to FashionTT	TTCSI

Main Tasks by Project Stage:

Initiation	Planning	Prepare	Execution & Monitor	Closure
• Agree on outcomes	Stakeholder mapping Review existing work done in this domain Develop communication plan	• Communication plan	• Follow-up with key stakeholders • Prepare progress reports (TTCSI to FashionTT)	• Prepare final report

Critical Success Factors:

Be sure to include	Be sure to avoid
• Review previous efforts • Understand reasons for not implementing this thus far	

Scaling up or down options:

With more resources	With fewer resources
• Intensify lobbying efforts	

4.4.1.1.2 S2. Fashion & Trade Shows for Sales

Full Title	S2. Fashion and Trade Shows for Sales
Short Title	S2. Sales Access
Strategic Programme:	P1A. Market Access
Description	Top export ready firms that are not part of the GVC support project are supported to participate in selected fashion and trade shows for the purpose of sales. The firms are selected by an expert panel. Shows are selected based on the target markets of the firms. Firms are offered support for three consecutive years once they meet performance standards to be specified by expert panel. Draft criteria for selection are based on Quality, Export Volume, Market Experience.

Action Plan

Objective	Principal Strategies & Measures	Performance Indicator (Outcomes)	Performance Indicator (Outputs)	Baseline Data	Target			Lead Organization	Support	Investment (annual TT$ '000)
					Year 1	Year 2	Year 3-5			
O2. To provide a forum for designers to increase their visibility and market their products	**S2. Fashion & Trade Shows for Sales** Host Fashion Trade Shows to promote designers, brands and increase sales	Consolidated financial value of sales and orders	- At least 1 national trade show annually - Combined sales at Fashion and Trade Shows - Number of firms' participation - Participation at >3 consecutive shows	- None available [reference ExportTT for trade mission figures]	Top 10% of firms to participate (approx.. 7 firms)	50% of participating firms have sales orders	90% of participating firms have sales orders	FashionTT		400

Procurement

Item description	Month when needed	Quantity	From where to buy?	Estimated cost ('000)	Procurement Method	Procurement Schedule				
						Advertise	Submission of Bids	Bid Evaluation and recommendation approval	Contract award	Delivery
[See FVCIP]	[See FVCIP]	[See FVCIP]	[See FVCIP]	[See FVCIP]	[See FVCIP]	[See FVCIP]	[See FVCIP]	[See FVCIP]	[See FVCIP]	[See FVCIP]

Monitoring & Evaluation

Priority Policies, Programmes and Projects	Goal(s)	Expected Outcome(s)	Evaluation Type (Frequency)	Planned Evaluation Completion Date (mm/yy)	Evaluation Method(s)	Entity Responsible for Evaluation
Fashion and Trade Shows for Sales	Broaden and deepen market access for individual firms of all Fashion Industry sectors, while building a collective brand, and eliminating the Trinidad and Tobago e-payment hurdle for trade.	Consolidated financial value of sales and orders	Annual	June 2018	Document review (EximTT reports)	FashionTT

Main Tasks by Project Stage:

Initiation	Planning	Prepare	Execution & Monitor	Closure
• Integrate project into Fashion Value Chain Investment Programme (FVCIP) • Confirm outcomes measures and targets • FashionTT Executive and Board establishes any additional performance policies that must be adhered to	• Review target firms • Establish evaluation criteria • Review project stakeholder groups • Plan support programme and processes • Develop communications plan	• Prepare communications • Prepare support programme and processes (FVCIP manager with Expert Panel) • Prepare monitoring and evaluation programme	• Launch project • Execute Communication plan • Evaluate and select firms for support • Sign MOUs with participating firms • Monitor and support participating firms • Prepare progress reports (the FVCIP manager to FashionTT)	• Prepare final report with lessons learned – either to close off project or start another 3 year cycle (FVCIP manager to FashionTT)

Critical Success Factors:

Be sure to include	Be sure to avoid
• Participating firms to mentor for some time, to be specified in MOU, peer organizations in the industry. • Firms need to attend the same trade show for at least three years in a row in order to increase their chance of success. • Performance criteria need to be part of the MOU and if firms to do not adhere to them they need to leave the programme. • Support programme needs to be reviewed annually by expert panel and FVCIP executive in order to determine what adaptations are necessary for increased success.	• Too frequent rotation of participating firms (great care should be taken in the initial selection so as to ensure continuity along with accountability in the programme).

Scaling up or down options:

With more resources	With fewer resources
• Start the project as a multi-cohort programme. • Increase support programme to include capacity building for different operational value chain components of their firms during the course of the three years (in between the Trade shows).	• Reduce the number of firms participating while keeping the three year term of the support. • Ask participating firms to contribute 25% of costs.

4.4.1.1.3 S3.Trade Events for Sourcing and Partnerships

Full Title	S3. Trade Events for Sourcing and Partnerships
Short Title	S3. Sourcing Access
Strategic Programme	P1A. Market Access
Description	Selected firms (for local and export production) that are not part of the GVC support project are supported to participate in selected trade shows for the purpose of sourcing new and different materials (as well as establish partnerships with other firms). The firms are selected by an expert panel. Shows are selected based on the target markets of the firms. Firms are offered support for three consecutive years once they meet performance standards to be specified by expert panel. Draft criteria for selection are based on Quality, Export Volume, Market Experience.

Action Plan

Objective	Principal Strategies & Measures	Performance Indicator (Outcomes)	Performance Indicator (Outputs)	Baseline Data	Target			Lead Organization	Support	Investment (annual TT$ '000)
					Year 1	Year 2	Year 3-5			
O3. To improve access to the supply, production and distribution elements of the Fashion value chain	**S3.Trade Events for Sourcing and Partnerships** Identify and support attendance to BSB fashion events by local fashion firms/ individuals	Diversity of sourcing locations and production partnerships	- Number of B2B events attended - Number of partnerships created - Number of firms repeated participation	- None – this has not been in focus	7 selected firms participate	80% have new sourcing markets	100% have new sourcing markets	FashionTT		400

Procurement

Item description	Month when needed	Quantity	From where to buy?	Estimated cost ('000)	Procurement Method	Procurement Schedule				
						Advertise	Submission of Bids	Bid Evaluation and recommendation approval	Contract award	Delivery
[see FVCIP]	[see FVCIP]	[see FVCIP]	[see FVCIP]	[see FVCIP]	[see FVCIP]	[see FVCIP]	[see FVCIP]	[see FVCIP]	[see FVCIP]	[see FVCIP]

Monitoring & Evaluation

Priority Policies, Programmes and Projects	Goal(s)	Expected Outcome(s)	Evaluation Type (Frequency)	Planned Evaluation Completion Date (mm/yy)	Evaluation Method(s)	Entity Responsible for Evaluation
Fashion and Trade Shows for Sourcing	Broaden and deepen market access for individual firms of all Fashion Industry sectors, while building a collective brand, and eliminating the Trinidad and Tobago e-payment hurdle for trade.	Diversity of sourcing locations and production partnerships	Annual	June 2018	Report from participating firms to Executive of FVCIP	FashionTT

Main Tasks by Project Stage:

Initiation	Planning	Prepare	Execution & Monitor	Closure
• Integrate project into Fashion Value Chain Investment Programme (FVCIP) • Confirm outcomes measures and targets • FashionTT Executive and Board establishes any additional performance policies that must be adhered to	• Review target firms • Establish evaluation criteria • Review project stakeholder groups • Plan support programme and processes • Develop communications plan	• Prepare communications • Prepare support programme and processes (FVCIP manager with Expert Panel) • Prepare monitoring and evaluation programme	• Launch project and • Execute Communication plan • Evaluate and select firms for support • Sign MOUs with participating firms • Monitor and support participating firms • Prepare progress reports (the FVCIP manager to FashionTT)	• Prepare final report with lessons learned – either to close off project or start another 3 year cycle (FVCIP manager to FashionTT)

Critical Success Factors:

Be sure to include	Be sure to avoid
• Participating firms to mentor for some time, to specified in MOU, peer organizations in the industry. • Firms need to attend the same trade show for at least three years in a row in order to increase their chance of success. • Performance criteria need to be part of the MOU and if firms to do not adhere to them they need to leave the programme. • Support programme needs to be reviewed annually by expert panel and FVCIP executive in order to determine what adaptations are necessary for increased success.	• Too frequent rotation of participating firms (great care should be taken in the initial selection so as to ensure continuity along with accountability in the programme).

Scaling up or down options:

With more resources	With fewer resources
• Start the project as a multi-cohort programme. • Increase support programme to include capacity building for different operational value chain components of their firms during the course of the three years (in between the Trade shows).	• Reduce the number of firms participating while keeping the three year term of the support. • Ask participating firms to contribute 25% of costs.

4.4.1.1.4 S4. Development of a "Caribbean Aesthetic" brand

Full Title	S4. Development of a "Caribbean Aesthetic" brand
Short Title	S4. Carib. Brand
Strategic Programme	P1A. Market Access
Description	Develop a "Caribbean Aesthetic" brand identity for the Trinidad and Tobago Fashion Industry that utilizes the wide global brand awareness of the wider Caribbean and that will bring that benefit to the Fashion Industry. The brand does not constrain individual designers in their styles, but rather utilizes their diversity to build the "Caribbean Aesthetic" awareness and thereby create the linkage and demand pull – lead by the few designers that will be using the Global Value Chain to grow their sales by a few 100% and through the effect of the brand they will also have a pull effect on the other industry players in Trinidad and Tobago.

Action Plan

Objective	Principal Strategies & Measures	Performance Indicator (Outcomes)	Performance Indicator (Outputs)	Baseline Data	Target			Lead Organization	Support	Investment (annual TT$ '000)
					Year 1	Year 2	Year 3-5			
O4. To create a strong brand aimed at promoting Trinidad and Tobago Fashion and its various constituents	**S4. Development of a "Caribbean Aesthetic" brand** - Develop and issue scope of Works / RFP for Branding Project and hire consultant/firm	Increased Reference to "Caribbean Aesthetic" in intl & local industry copy	- RFP developed and tendered. - National branding campaign developed and implemented in Trinidad and Tobago, Region, and most importantly in extra Caribbean target markets	No consistent collective branding or positioning for the Fashion Industry	RFP developed and tender awarded and project executed	Short Term wins (Branding and Promotional activities) initiated	Review and revamp Branding and promotional activities initiative in Y2	FashionTT		800

Procurement

Item description	Month when needed	Quantity	From where to buy?	Estimated cost ('000)	Procurement Method	Procurement Schedule				
						Advertise	Submission of Bids	Bid Evaluation and recommendation approval	Contract award	Delivery
Brand Development & Campaign		One firm	Advertising Firms	800 yr 1 800 yr 2 600 yr 3	Tender	March'15	April '15	May	June	Year1-3

Monitoring & Evaluation

Priority Policies, Programmes and Projects	Goal(s)	Expected Outcome(s)	Evaluation Type (Frequency)	Planned Evaluation Completion Date (mm/yy)	Evaluation Method(s)	Entity Responsible for Evaluation
Development of a "Caribbean Aesthetic" brand	Broaden and deepen market access for individual firms of all Fashion Industry sectors, while building a collective brand, and eliminating the Trinidad and Tobago e-payment hurdle for trade.	Reference to "Caribbean Aesthetic" in intl & local industry copy	Annual	June 2018	Document reviews, Focus groups, Survey	FashionTT

Main Tasks by Project Stage:

Initiation	Planning	Prepare	Execution & Monitor	Closure
• Establish steering committee • Establish industry consultative reference group for Trinidad and Tobago – include international experts • Agree on creative brief	• Review fashion industry brand position for other countries • Review Empathy Maps developed for strategy • Interviews & working sessions with consultative reference group.	• Develop the brand strategy and test with consultative reference group and other stakeholders • Plan campaign execution, prioritizing different markets and channels	• Execute campaign locally and internationally • Monitor effectiveness and adapt campaign	• Engage consultative reference group in feedback as well as other industry and non-industry stakeholders • Derive lessons learned

Critical Success Factors:

Be sure to include	Be sure to avoid
• Consultation • International Experts • Focus on the Caribbean as a whole in brand, and all the diversity that it includes and how Trinidad and Tobago reflects that Caribbean diversity • Include wide examples of different fashion designers and expressions to build the brand • Utilize events and images that go beyond Trinidad and Tobago to exemplify what "Caribbean" and "Caribbean Aesthetic" means • Focus the campaign execution on prioritized markets: locally and key target for the larger export markets pursued by the GVC firms (first recommendation is to stay within the established markets that are currently understood and serviced by Trinidad and Tobago companies)	• Don't only focus on Trinidad and Tobago as the brand • Don't use a narrow interpretation of what Caribbean is or means as the brand must carry the wider Trinidad and Tobago Fashion Industry • Diluting the brand to such an extent that it could be anything to anybody • Do not execute the campaign without reference to the actual export activity and market developments of the Trinidad and Tobago Fashion Industry.

Scaling up or down options:

With more resources	With fewer resources
• There are two parts that can increase: 1. Development of the campaign – this could be done with more preparation and design effort and 2. The execution of the campaign • The execution of the campaign has almost unlimited scaling potential. • First intensify the campaign execution in chosen markets and then expand to others.	• Avoid spreading campaign resources too wide and thin • Therefore, limit first the number of markets and then the intensity within the markets.

4.4.1.2 P1B. Innovate Organizations & Operations

Strategic Programmes For industry viability

1. Improve Market Access
2. Innovate Organizations & Operations
3. Assure Sector Coordination & Support
4. Well governed Strategic Investments
5. Institute an Industry Intelligence and Innovation Function
6. Actively Manage the Industry Strategy and Governance Process Policy

Programme Direction Statement (Outcomes & Impacts)

We will promote the organizational and operational improvement of all value chain elements of companies with proven potential while at the same time investing in promoting the establishment of a local outsourced production cooperative company and the targeted transformation support of qualified companies to fully embed into the Global Value Chain.

Strategic Objective

Effective, efficient, and appropriately organized companies for different markets and value propositions

Principal Strategies

1. Cooperative for sample & local production runs
2. Value-Chain Investment Programme - Global Value Chain firms
3. Value-Chain Investment Prog.- Non GVC companies

Performance Indicators

Outcomes:

Output:

New value proposition: Produce authentic design in Caribbean and produce in global locations that would be consistent with the expectations and demands of customers (China, for example, would not be acceptable to many customers because of the perceived low product quality) globally in order to meet larger scale demand globally. This forms part of the Value-Chain Investment Programme. A crucial element is to support 2 qualified existing or new local partnership firms to sell to existing markets (Caribbean, USA, Europe) and produce in Colombia – Medellin for example. This is a keystone initiative and it is further elaborated in Appendix 8. In this option, it is expected that the selected firms will need to contribute a financial investment (to be determined) as well.

A critical problem for years has been the difficulty in finding and retaining qualified production staff in Trinidad and Tobago and being able to scale up production by smaller design companies on occasions when somewhat larger sales opportunities are available. In this regard, the idea of instituting a Cooperative has found resonance in the various consultations for this project. Mr. Robert Young (The Cloth) has led the idea of starting a Cooperative and has developed a proposal document which can serve as the foundation for this project.

4.4.1.2.1 S1. Value-Chain Investment Programme (VCIP) – Non-GVC firm value chain step improvement

Full Title	S1. Value Chain Investment Programme (VCIP) - Non-GVC firm value chain step improvement
Short Title	S1. VCIP – Non - GCV improvement
Strategic Programme	P1B. Organizations and Operations
Description	The aim of this project is to support up to five firms per cohort in improving up to two elements of their value chain. This project does not seek to integrate the firms into the GVC, but to improve their in-house performance or to outsource some steps locally. The participating firms will be carefully selected by the international expert panel of the FVCIP and offered a one year support. Participants will benefit from fashion production consultants and through the improvements in the value chain harness the most significant value potentials that have been identified in the strategic planning process (see section 2.3 for reference to Value Potentials). Criteria for selecting the firms are developed by the international expert panel, but they must include quality, export volume, market experience, and co-finance capability. This support project must include a co-finance component and international expert panel will determine the performance criteria to be included in order to stay in the support programme for the duration of the year. In its default design, this programme will consist of one cohort of 5 firms per year.

Action Plan

Objective	Principal Strategies & Measures	Performance Indicator (Outcomes)	Performance Indicator (Outputs)	Baseline Data	Target			Lead Organization	Support	Investment (annual TT$ '000)
					Year 1	Year 2	Year 3-5			
O5. To improve the use and access of the local fashion value chain by constituents	**S1. Value-Chain Investment Programme (VCIP) – Non-GVC firm value chain step improvement** - Develop RFP for VCIP - Non-GCV project	Improvement of the local Value Chain of firms	- RFP for VCIP – Non GVC developed and tended Consultants for value chain step improvement hired - Local Value chain steps improved	No current support for Fashion Industry firms	5 firms	5 firms	15 firms	FashionTT	- TTCSI - Industry Associations	400

Procurement

Item description	Month when needed	Quantity	From where to buy?	Estimated cost ('000)	Procurement Method	Procurement Schedule				
						Advertise	Submission of Bids	Bid Evaluation and recommendation approval	Contract award	Delivery
[See FVCIP]	[See FVCIP]	[See FVCIP]	[See FVCIP]	[See FVCIP]	[See FVCIP]	[See FVCIP]	[See FVCIP]	[See FVCIP]	[See FVCIP]	[See FVCIP]

Monitoring & Evaluation

Priority Policies, Programmes and Projects	Goal(s)	Expected Outcome(s)	Evaluation Type (Frequency)	Planned Evaluation Completion Date (mm/yy)	Evaluation Method(s)	Entity Responsible for Evaluation
Value Chain Investment Programme (VCIP) - Non-GVC firm value chain step improvement	25 firms supported	Firms effectively and efficiently organized to be able to harness the full Value Potential that exists at all stages of the value chain.	Semi-annual	June 2020	Project report by FVCIP project manager	FashionTT

Main Tasks by Project Stage:

Initiation	Planning	Prepare	Execution & Monitor	Closure
• FVCIP –non-GVC is integrated into the FVCIP • FashionTT executive and board determine expected outcomes and specify any conditions that need to be met • Outcomes and constraints are agreed with the FVCIP Project manager and the FVCIP international expert evaluation committee	• Review existing knowledge about the experience and capabilities of Trinidad and Tobago Fashion Industry firms • Map stakeholders • Develop communication plan	• TOR for Value Chain improvement consultants are drawn up • Develop pool of consultants • Stakeholders and in particular support organizations are engaged	• Communication Plan executed • Application Process opened • MOUs with Selected Firms agreed • Phased firm support programme executed • Monitoring reports submitted to FashionTT	• Lessons learned, including possible application to other industries and recommendations for scaling up • Project Closure

Critical Success Factors:

Be sure to include	Be sure to avoid
• Co-financing by firms that are being supported • Selection and support guidance by international expert panel that is free from conflicts of interest and that has the experience of transforming firms using the Global Value Chain, in the Fashion Sector. • Transparency and accountability in the process	• Be sure not to spread support too thinly as very few firms would be capable of achieving this transformation • Be sure to avoid a perceived bias against firms that are successful and growing rapidly

Scaling up or down options:

With more resources	With fewer resources
• First increase the intensity of support for the five firms in each cohort • Then increase the number of firms in cohort	• First decrease the number of firms in cohort • Then decrease the level of support for each firm

4.4.1.2.2 S2. Production Cooperative

Full Title	S2. Production Cooperative
Short Title	S2. Cooperative
Strategic Programme	P1B. Organizations and Operations
Description	All Fashion Industry stakeholders have identified the actual production process of garments to be challenging because of a shortage of skills, poor work ethic as well as low productivity. Industry members have identified the possibility of establishing a production cooperative as a viable vehicle through which the most talented and skilled production staff can come together and scale up production, turnover, in an organizational form that encourages pride and high organizational values. Many fashion apparel designers have expressed an interest in being able to outsource locally the production run for smaller quantity orders once quality and confidentiality can be guaranteed. The production bottle neck in the industry is large enough to warrant a concerted effort to find a way for firms to produce large enough qualities to be able to scale up their own design and distribution operations as well as to produce sample batches. The draft project proposal ("Living through Dreams – Workers' Cooperative") submitted by Robert Young (2013) may be used as a starting point for further project design and elaboration. TTCSI is to be the executing organization and in turn use an International Fashion Industry Cooperative Organization Consultant (organizing their individual procurement process – a three year project 2015-2018). TTCSI is a natural execution partner for this project because there are other service industry sectors where the use of Cooperatives is being explored by TTCSI.

Action Plan

Objective	Principal Strategies & Measures	Performance Indicator (Outcomes)	Performance Indicator (Outputs)	Baseline Data	Target			Lead Organization	Support	Investment (annual TT$ '000)
					Year 1	Year 2	Year 3-5			
O6. To increase local garment manufacturing capacity	**S2. Production Cooperative** Create project to design and facilitate the development of a Fashion-Production Cooperative that is locally owned	- Outsourced production possible in Trinidad and Tobago (sample & local run productions)	- Cooperative established	- Limited / No production outsourcing possibility in Trinidad and Tobago	0	1	1	TTCSI	FashionTT	600

Procurement

Item description	Month when needed	Quantity	From where to buy?	Estimated cost ('000)	Procurement Method	Procurement Schedule				
						Advertise	Submission of Bids	Bid Evaluation and recommendation approval	Contract award	Delivery
Professional services	June '15	1	TTCSI	600	Sole Select				June '15	June '18

Monitoring & Evaluation

Priority Policies, Programmes and Projects	Goal(s)	Expected Outcome(s)	Evaluation Type (Frequency)	Planned Evaluation Completion Date (mm/yy)	Evaluation Method(s)	Entity Responsible for Evaluation
Production Cooperative	Effective, efficient, and appropriately organized companies for different markets and value propositions	Outsourced production possible in Trinidad and Tobago (sample & local run productions)	Semi-Annual	June 2018	Project reports by TTCSI to FashionTT	TTCSI

Main Tasks by Project Stage:

Initiation	Planning	Prepare	Execution & Monitor	Closure
• Define project outcomes	Stakeholder mapping Review existing proposal/work	• Project Scope and Terms of Reference	• Award contract and monitor	•

Critical Success Factors:

Be sure to include	Be sure to avoid
• Be sure that an international perspective with experience in production cooperatives in the Fashion Industry is engaged • Be sure to emphasize that the process for the development of this cooperative firm is inclusive and engages the stakeholders at all levels. • Be sure to develop the cooperative from the start in a way that engenders the confidence of many designers rather than relying on the demand by a few.	• Be sure to avoid consultants who do not have both the experience of start-up cooperatives and the Fashion Industry. • Be sure to avoid any processes or steps that further decrease the prevailing low conditions of trust in the industry.

Scaling up or down options:

With more resources	With fewer resources
• Increase intensity of engagement and decrease implementation time to 2 years. • Include a soft loan option	• Do a feasibility study and hand over to other support programme (eg. NEDCO) • Co-financing requirement by participants

4.4.1.2.3 S3. Fashion Value-Chain Investment Programme (FVCIP) – Global Value Chain Transformation

Full Title	S3. Fashion Value Chain Investment Programme (FVCIP) - Global Value Chain Transformation
Short Title	S3. FVCIP – GCV
Strategic Programme:	P1B. Organizations and Operations
Description	The aim of this project is to support up to two qualified firms to transform their value chain and integrate fully into the Global Value Chain so as to be able to scale up their export capability by several orders of magnitude within five years so as to become a high visibility brand in their chosen export markets and across the Caribbean. This is the flagship or keystone component of the FVCIP and the Fashion Industry Strategic Plan. The participating firms will be carefully selected by the international expert panel of the FVCIP and offered a three year support. Participants will benefit from export support professionals who must have the experience of having helped other Caribbean firms for production and distribution partnerships with international firms. Furthermore, participants will also be supported by consultants in the Latin American Fashion Industry who have helped partnerships to develop and who have a proven track record of enabling firms to sell to distributors. The primary market to explore is Latin America and in particular Colombia. Criteria for selecting the firms are developed by the international expert panel, but they must include quality, export volume, market experience, and co-finance capability. This support project must include a co-finance component and international expert panel will determine the performance criteria to be included in order to stay in the support programme over the three years. In its default design, this programme will consist of only one cohort of 2 participating companies. If the support for one is discontinued because of a breach in the MOU, then another suitably qualified firm can be considered for support.

Action Plan

Objective	Principal Strategies & Measures	Performance Indicator (Outcomes)	Performance Indicator (Outputs)	Baseline Data	Target			Lead Organization	Support	Investment (annual TT$ '000)
					Year 1	Year 2	Year 3-5			
O7. To improve access and use of the global fashion value chain by constituents	**S3. Fashion Value-Chain Investment Programme (FVCIP) – Global Value Chain Transformation**	Firms making full use of the Global Value Chain (GVC)	- Number of partnerships established - Volume of export sales	Currently international outsourcing done only for domestic market sales. - Highest export volume by a single fashion apparel designer less than TT$1m	1 partnership $2m	2 partnerships $4m	4 partnerships $8m	FashionTT	EximTT ExportTT TTCSI Business Chambers	600

Procurement

Item description	Month when needed	Quantity	From where to buy?	Estimated cost ('000)	Procurement Method	Procurement Schedule				
						Advertise	Submission of Bids	Bid Evaluation and recommendation approval	Contract award	Delivery
[See FVCIP]	[See FVCIP]	[See FVCIP]	[See FVCIP]	[See FVCIP]	[See FVCIP]	[See FVCIP]	[See FVCIP]	[See FVCIP]	[See FVCIP]	[See FVCIP]

Monitoring & Evaluation

Priority Policies, Programmes and Projects	Goal(s)	Expected Outcome(s)	Evaluation Type (Frequency)	Planned Evaluation Completion Date (mm/yy)	Evaluation Method(s)	Entity Responsible for Evaluation
Fashion Value Chain Investment Programme (FVCIP) - Global Value Chain Transformation	Effective, efficient, and appropriately organized companies for different markets and value propositions	Firms making full use of the Global Value Chain (GVC)	Semi-Annual	June 2018	Project report by FVCIP project manager	FashionTT

Main Tasks by Project Stage:

Initiation	Planning	Prepare	Execution & Monitor	Closure
• FVCIP –GVC is integrated into the FVCIP • FashionTT executive and board determine expected outcomes and specify any conditions that need to be met • Outcomes and constraints are agreed with the FVCIP Project manager and the FVCIP international expert evaluation committee	• Evaluation Committee reviews exporting and partnership formation experience by Caribbean companies with Latin American companies, and outsourcing experience by fashion designers globally • Stakeholders are mapped • Communication plan developed	• TOR for Export promotion consultants in Trinidad and Tobago and Latin America are drawn up • Develop pool of consultants • Stakeholders and in particular, support organizations, are engaged	• Project is Launched • Communication Plan executed • Application Process opened • MOUs with Selected Firms agreed • Phased firm support programme executed • Monitoring reports submitted to FashionTT	• Lessons learned, including possible application to other industries and recommendations for scaling up • Project Closure

Critical Success Factors:

Be sure to include	Be sure to avoid
• Co-financing by firms that are being supported • Selection and support guidance by international expert panel that is free from conflicts of interest and that has the experience of transforming firms using the Global Value Chain, in the Fashion Sector. • Transparency and accountability in the process	• Be sure not to spread support too thinly as very few firms would be capable of achieving this transformation • Be sure to avoid a perceived biased against firms that are successful and growing rapidly

Scaling up or down options:

With more resources	With fewer resources
• Could start a new cohort of 2 firms every two years, leading to a higher churn rate of firms that are not successful, but increasing the probability that one will achieve the full breakthrough within the five years of this planning period. • Expand the leadership development component of the support offered	• Increase the proportion of co-financing • Support only one firm at a time for three years, before starting cycle

4.4.1.3 P2. Assure Sector Coordination & Support

Strategic Programmes For industry viability

1. Improve Market Access
2. Innovate Organizations & Operations
3. Assure Sector Coordination & Support
4. Well governed Strategic Investments
5. Institute an Industry Intelligence and Innovation Function
6. Actively Manage the Industry Strategy and Governance Process Policy

Programme Direction Statement (Outcomes & Impacts)

We will assure the essential ability of all fashion sector members to coordinate their development, production, and marketing activities by investing in the development of essential coordination tools, mechanisms, the capacity of closely linked sector associations, and business support organizations.

Strategic Objective

Alignment of local industry activity with international market cycles and key events as well as maximization of local sector integration possibilities.

Principal Strategies

1. Coordinate sector members
2. Capacity building for Industry associations
3. Related agency coordination

Performance Indicators

Outcomes:

Output:

Coordination is particularly important for the fashion apparel and the fashion accessories sectors. Opportunities to link the fashion accessories sector with apparel and functional apparel will be emphasized. Linkages between the whole industry and the Mas industry are particularly promising and will be promoted. The aim of the intervention is to make active participation by all members of the sectors beneficial to them.

Standard coordination mechanism such as a fashion calendar, newsletter, recognition mechanisms for industry members, and resource sharing facilities will be promoted. The aim is to make all aware of relevant trade events, key dates and cycles, linkage opportunities. Coordination and liaison with related agencies in trade, education, regulation, support, and promotion should be made systematic by establishing formal linkages between the organizations that do not depend only on the relationships of individuals.

Capacity development for associations: at present there are primarily three (3) organizations: FETT, FATT, DUS. In order to support integration there will be a review of the feasibility to integrate the associations into one consolidated association with different committees and focal areas (inclusive of Tobago).

4.4.1.3.1 S1. Support Agency Coordination

Full Title	S1. Related & Support Organization Coordination
Short Title	S1. Related Coordination
Strategic Programme	P2. Assure Sector Coordination & Support
Description	The success of the Fashion Industry depends in part on the effective functioning of the relevant support organizations. The primary objective of this project is to improve the functioning of the support organizations by creating a better understanding of, higher awareness of, and more customized services for the Fashion Industry members. Examples of supply and support organizations are textile and notions importers, financial institutions like banks whom the Fashion Industry stakeholder depend on for loans, export promotion companies, TTBS, CSO, EximTT, ExportTT, UTT, YTEPP, Incubators and others – see inventory produced for this strategic plan. There would be two main kind of activities: • Focus group sessions – for awareness, understanding, and customized service development • Active customized communication programme for each organization (linking this with the Branding Project and the capacity building programme for the association).

Action Plan

Objective	Principal Strategies & Measures	Performance Indicator (Outcomes)	Performance Indicator (Outputs)	Baseline Data	Target			Lead Organization	Support	Investment (annual TT$ '000)
					Year 1	Year 2	Year 3-5			
O8. To ensure effective collaboration and coordination of support industries in order to consolidate efforts and resources.	**S1. Related & Support Organization Coordination** - Conduct a stakeholder mapping exercise to identify the key support stakeholders - Review policy mandates and design programme to consolidate individual efforts	Alignment of support and opportunities	- Systematic Linkages developed	- No coordination mechanisms exists	70%	90%	100%	FashionTT	- TTCSI - Industry Associations	100

Procurement

Item description	Month when needed	Quantity	From where to buy?	Estimated cost ('000)	Procurement Method	Procurement Schedule				
						Advertise	Submission of Bids	Bid Evaluation and recommendation approval	Contract award	Delivery
Communication & Facilitation Consultant	June 2015	1	Trinidad and Tobago	100	Tender	March	April	May	June	June 2015

Monitoring & Evaluation

Priority Policies, Programmes and Projects	Goal(s)	Expected Outcome(s)	Evaluation Type (Frequency)	Planned Evaluation Completion Date (mm/yy)	Evaluation Method(s)	Entity Responsible for Evaluation
Related & Support Organization Coordination	100% alignment of support and supply organizations with industry needs and strategy	Alignment of support and opportunities	Quarterly	June 2016	Project progress reports	FashionTT

Main Tasks by Project Stage:

Initiation	Planning	Prepare	Execution & Monitor	Closure
• FashionTT executive and board determine expected outcomes and specify any conditions that need to be met • Outcomes and constraints are agreed with the executing organization(s)	• Map stakeholders • Develop communication plan	• TOR for the consultant	• Award contract • Execute communications plan • Monitor reports submitted	• Lessons learned, including possible application to other industries • Project Closure

Critical Success Factors:

Be sure to include	Be sure to avoid
• Mechanism to facilitate two-way understanding between Fashion Industry and supply and support organizations – insights from focus sessions should be shared through newsletter and other channels	• Focusing on select firms or designers leading to perceived bias • Missing of publication deadlines • Lack of follow-through

Scaling up or down options:

With more resources	With fewer resources
• Increase the linkage with the branding project to amplify results • Increase investment in media	• Focus on financing institutions as there is the greatest need and gap

4.4.1.3.2 S2. Coordinate Sector members

Full Title	S2. Coordination Mechanisms for Industry Members
Short Title	S2. Coordination
Strategic Programme:	P2. Assure Sector Coordination & Support
Description	There are two important dimensions to the coordination of Fashion Industry players: i. the individual firms need to be able to get in sync with local, regional, and international patterns of in the Fashion Industry demand and events; There are seasonal patterns with relatively long lead times and there are also changes in the relative importance of different industry events. ii. within the industry in Trinidad and Tobago members of the Fashion Industry sectors need to coordinate with each other. There are relatively large variations in production during the course of the year and the more developed sector members know of the patterns in other sectors (for example, accessories knowing the demand patterns in fashion apparel or function apparel) then the conditions for cooperation and sector integration, as well as local value addition is increased. There is the need to develop an annual Fashion Calendar and a Newsletter for the Industry. The fashion calendar highlights local, regional, and international events and trends. This would also stimulate demand and facilitate production and lower transaction costs. The calendar needs professional independent input and editing so as to ensure that the highest quality events and trends for different sectors and target markets are brought out. The newsletter would inform industry players of local and regional events, industry members, opportunities, and emerging risks. The newsletter is an important avenue for sharing information, creating transparency in the industry, and thereby helps to create trust. The newsletter also helps to connect the industry regionally and internationally. Feature articles can also be educational and inspirational. The strategy research has led to the identification of three sectors in the Trinidad and Tobago Fashion Industry and a first inventory of industry members. There is now the need to create a forum where the members can come together and network and appreciate each other. A bi-annual recognition event can be that forum. Sharing information, samples, books, studies, industry publications and other resources would lower transaction costs, create transparency, and stimulate innovation. It is therefore proposed that the Industry Association be enabled to lead on such a project. This would be an initiative for and by industry members. From a systemic perspective, FashionTT should be accountable that adequate coordination mechanisms exist, while from an implementation perspective, the Industry Association(s) are in the best place for execution for maximum impact.

Action Plan

Objective	Principal Strategies & Measures	Performance Indicator (Outcomes)	Performance Indicator (Outputs)	Baseline Data	Target			Lead Organization	Support	Investment (annual TT$ '000)
					Year 1	Year 2	Year 3-5			
O9. To achieve alignment of local industry activity with international market cycles and key events as well as maximization of local sector integration possibilities.	**S2. Coordination Mechanisms for Industry Members** - Develop an Annual Fashion Calendar - Create a Bi-Annual Industry Newsletter - Establish an annual Industry recognition event - Design mechanism for sharing resources	Trinidad and Tobago industry activity aligned with international market cycles	- Annual Fashion Calendar developed - Bi-Annual Industry Newsletter produced - Creation and hosting of annual Industry recognition event - Mechanism for sharing resources established	No formal coordination mechanisms and industry event exist for the Fashion Industry	Calendar-100% Newsletter -100% Resource Sharing Facility -50%	Calendar Newsletter Resource Sharing Facility-50% Recognition event-100%	Calendar Newsletter Resource Sharing Facility Recognition event	FashionTT	Industry Associatio ns	100

Procurement

Item description	Month when needed	Quantity	From where to buy?	Estimated cost ('000)	Procurement Method	Procurement Schedule				
						Advertise	Submission of Bids	Bid Evaluation and recommendation approval	Contract award	Delivery
Production of Calendar Newsletter Resource Sharing Facility	June 2015	1	Fashion Association(s)	100	Sole select (or competitive bid amongst the current three associations					June 2016

Monitoring & Evaluation

Priority Policies, Programmes and Projects	Goal(s)	Expected Outcome(s)	Evaluation Type (Frequency)	Planned Evaluation Completion Date (mm/yy)	Evaluation Method(s)	Entity Responsible for Evaluation
Coordination Mechanisms for Industry Members	Calendar Newsletter Resource Sharing Facility 2 Recognition events	Alignment of local industry activity with international market cycles and key events as well as maximization of local sector integration possibilities.	Annual	June 2020	Reports by executing organizations	FashionTT

Main Tasks by Project Stage:

Initiation	Planning	Prepare	Execution & Monitor	Closure
• FashionTT executive and board determine expected outcomes and specify any conditions that need to be met • Outcomes and constraints are agreed with the executing organization(s)	• Map stakeholders • Develop communication plan	• TOR for producers of calendar, newsletter, resource sharing facility, recognition event • Stakeholders and in particular support organizations are engaged	• Award contracts for producers of calendar, newsletter, resource sharing facility, recognition event • Communication Plan executed • Monitoring reports submitted to FashionTT	• Lessons learned, including possible application to other industries and recommendations for scaling up • Project Closure

Critical Success Factors:

Be sure to include	Be sure to avoid
• Consider combing the recognition event with other relevant event so as to reduce organizational costs • Purchase high value industry studies • Establish institutional relationships with other fashion associations and institutions and include resource sharing arrangements • Include a resource sharing component for awardees of FVCI programmes • Terms of Reference for all coordination mechanisms need to specify that all sectors need to be served and there must be mechanism of professional peer review that ensures an avoidance of bias.	Be sure to avoid allocating too high a proportion of resources or focus on the recognition event

Scaling up or down options:

With more resources	With fewer resources
• Add the inclusion of the development and maintenance of a database of all members of the industry	• First reduce by postponing the recognition event, then the resource sharing facility, then the calendar

4.4.1.3.3 S3. Capacity Building for industry associations

Full Title	S3. Capacity Building for Industry Association
Short Title	S3. Cap. Dev. for Assoc.
Strategic Programme	P2. Assure Sector Coordination & Support
Description	At present there are three Fashion Industry associations. Each one has a somewhat different focus and therefore membership base – though there is some overlap. All three of the organizations would benefit from capacity building. In view of the fact that main focus of this Fashion Industry Strategy is to create a viable industry by investing in all the requisite processes and systems to ensure that the industry becomes a viable system, it is proposed that the three Associations be integrated into one that then has a larger membership base, larger income, is more viable itself, and is able to support the integration of the sector. This project would be executed by TTCSI who in turn would develop their own capacity to support all other associations that are members of their organization. Through this process the wider service sector is strengthened and multiplier effect of individual firm success increased. Success in this project is necessary so that an increasing number of industry coordination and support activities can be executed by the Association – a process that in itself increases the viability and capacity of the Associations. The main areas for work with the association includes the development of the requisite organizational governance and operation mechanisms, a strategy for high value services, and include a path for financial viability.

Action Plan

Objective	Principal Strategies & Measures	Performance Indicator (Outcomes)	Performance Indicator (Outputs)	**Baseline Data**	**Target**			**Lead Organization**	**Support**	**Investment (annual TT$ '000)**
					Year 1	**Year 2**	**Year 3-5**			
O10. To improve the competency, skills, reach and impact of the Fashion Industry Associations	**S3. Capacity Building for Industry Association** - Design and implement an annual training programme	- Improved Local sector integration & viability through strengthened Associations	- Capacity Building Programme for Associations Developed and Implemented	- Three industry associations that are each working individually to become viable.	Creation of 1 viable industry association 50% of capacity development programme	100% of capacity development programme		TTCSI	FashionTT	400

Procurement

Item description	Month when needed	Quantity	From where to buy?	Estimated cost ('000)	Procurement Method	Procurement Schedule				
						Advertise	Submission of Bids	Bid Evaluation and recommendation approval	Contract award	Delivery
Capacity Building for Industry Association	June '15	1	Consultant	400	tender	March	April	May	June '15	June 2016

Monitoring & Evaluation

Priority Policies, Programmes and Projects	Goal(s)	Expected Outcome(s)	Evaluation Type (Frequency)	Planned Evaluation Completion Date (mm/yy)	Evaluation Method(s)	Entity Responsible for Evaluation
Capacity Building for Industry Association	One viable Fashion Industry association	One viable Fashion Industry association	quarterly	June 2016	Project progress reports	TTCSI

Main Tasks by Project Stage:

Initiation	Planning	Prepare	Execution & Monitor	Closure
• FashionTT executive and board determine expected outcomes and specify any conditions that need to be met • Outcomes and constraints are agreed with the executing organization(s)	• Map stakeholders • Develop communication plan	• TOR for the consultant to work with the association	• Award contract • Execute communications plan • Monitor reports submitted	• Lessons learned, including possible application to other industries • Project Closure

Critical Success Factors:

Be sure to include	Be sure to avoid
• Organizational form and structure needs to enable the association to execute the strategy (which is to be developed). • Be sure to benchmark the associations' work with that of other fashion associations in other regions	• Avoid a process that is 'top down' and lacks consultation. The consultant must have proven capability to engage stakeholders and lead consensus building approaches

Scaling up or down options:

With more resources	With fewer resources
• Add support for the development of specific service offerings of the association	• Develop only the strategy for the association without organizational transformation support

4.4.1.4 P3. Well-governed Strategic Investments

Strategic Programmes For industry viability

1. Improve Market Access
2. Innovate Organizations & Operations
3. Assure Sector Coordination & Support
4. Well governed Strategic Investments
5. Institute an Industry Intelligence and Innovation Function
6. Actively Manage the Industry Strategy and Governance Process Policy

Programme Direction Statement (Outcomes & Impacts)

The purpose of investment in the fashion industry to create a successful, dynamic, and viable industry. We therefore invest in accordance with the agreed viability priorities. We maintain the highest standards of good governance, including the establishment of transparent criteria and outcome measures based on consultation with all stakeholders and separate the governance function from operations, including the use of an independent international selection panel.

Strategic Objective

Transparent and assured progress towards industry success and viability through good governance.

Principal Strategies

Well-governed Strategic investment programme

Performance Indicators

Outcomes: Explicit criteria, professional judgment, no conflict of interest, accountability
Output: Published criteria, independent panel, monitoring reports

Strategic investments in the industry play a critical role in the industry strategy. It is therefore of the utmost importance that the investments are seen to be governed in a fair, transparent, and cost effective way. Investments in this programmatic area therefore speak to the importance of instituting a well governed investment programme by CreativeTT through FashionTT. The investment programme comprises of:

a. Create GVC companies
b. Market access
c. Associations and support organizations
d. Capacity building of non-GVC firms

In order to ensure success, the following critical good governance features must be included:

1. Systematic consultation on and communication of the criteria for making investments
2. A qualification process for applicants that tests the readiness of firms – quality, volume, market experience, together with ability to commit own funds to the process.
3. An independent, professional, panel that includes non- Trinidad and Tobago nationals with right experience
4. A monitoring, auditing, and accountability programme that reports on progress, holds participants accountable, and helps to improve the programme over time.

Since the actual investment costs are presented alongside the initiatives, only the direct costs of the programme administration itself are presented here. The most significant cost here are the fees and expenses associated with the independent, professional expert panel.

4.4.1.4.1 S1. Well Governed Strategic Investment Programme (Value-Chain Investment Programme)

Full Title	S1. Well Governed Strategic Investment Programme (Fashion Value-Chain Investment Programme)
Short Title	S1. Intl. Panel
Strategic Programme:	P3. Well Governed Strategic Investments
Description	This is a flagship or keystone component of this strategy for the Fashion Industry. The programme is located in FashionTT and managed by it. The programme is Governed by the FashionTT Board and the CEO of CreativeTT. There must be a project management office and manager accountable for the successful execution of the FVCIP. The project manager, together with the CEO of CreativeTT leads the process of constituting a three person independent international panel of Fashion Industry experts who will have the responsibility for deciding on the criteria for and selection of applicants to be included in the various support projects under this programme. The independent expert panel is also defining relevant aspects of the Support, Monitoring and Evaluation components of the programme to be included in the overall programme monitoring and reporting process by the Programme manager. The Programme Manager leads the procurement and management of consultants and service providers for this programme. The screening and selection by the Selection and Advisory Panel uses four main criteria to assess the appropriateness of different support channels for members of the Fashion Industry: 1. Quality production capabilities 2. Volume produced 3. Market experience 4. Co-finance capability Depending on how programme applicants score on the four dimensions, the panel directs them to one of four support avenues: 1. The GVC support programme for firms that, based on their experience and development steps taken, are ready to transform the business into ones that are fully integrated into the GVC 2. Incubator programme for new or young high potential companies or partnerships that first need to develop their overall system. FCVIP is engaging with an existing incubator programme 3. Non-GVC value chain improvement – here, up to two value chain elements are supported 4. Firms that are earmarked for future, or second wave/cohort support. Depending on the progress made by programme participants they can move from one support avenue to another over time.

Action Plan

Objective	Principal Strategies & Measures	Performance measure (Outcomes)	Lead Measures (Outputs)	Baseline Data	Target			Lead Organization	Support	Investment (annual TT$ '000)
					Year 1	Year 2	Year 3-5			
O11. To create a direct funding mechanism aimed at supporting export-ready firms	**S1. Well Governed Strategic Investment Programme (Fashion Value-Chain Investment Programme-FVCIP)** Create and launch FCVIP with explicit participation criteria and ensure transparency through the establishment of an independent (preferably international) panel	Explicit criteria, professional judgment, no conflict of interest, increased accountability	- FVCIP established and launched - Published Criteria, - Independent Panel - Monitoring reports	- No FVCIP investment programme is in operation	1 well-governed investment programme	1 well-governed investment programme	1 well-governed investment programme	FashionTT	- CreativeTT	200

Procurement

Item description	Month when needed	Quantity	From where to buy?	Estimated cost ('000)	Procurement Method	Procurement Schedule				
						Advertise	Submission of Bids	Bid Evaluation and recommendation approval	Contract award	Delivery
Independent international expert panel	April 2015	3 experts	International	200		March 15	March 15	April	April 15	April 15

Monitoring & Evaluation

Priority Policies, Programmes and Projects	Goal(s)	Expected Outcome(s)	Evaluation Type (Frequency)	Planned Evaluation Completion Date (mm/yy)	Evaluation Method(s)	Entity Responsible for Evaluation
Well Governed Strategic Investment Programme (Fashion Value-Chain Investment Programme)	International 3 Person Independent Panel	Transparent and assured progress towards industry success and viability through good governance.	Yearly	June 2020	Progress reports	FashionTT

Main Tasks by Project Stage:

Initiation	Planning	Prepare	Execution & Monitor	Closure
• FashionTT executive and board determine expected outcomes and specify any conditions that need to be met • Outcomes and constraints are agreed with CEO	• Map stakeholders • Develop communication plan • CEO conduct consultations on further criteria for the expert panel	• TOR for the expert panel members • Advertise internationally	• Award contracts with panel members • Execute the communications plan • Monitor reports submitted	• Lessons learned, including possible application to other industries • Project Closure

Critical Success Factors:

Be sure to include	Be sure to avoid
• Be sure to emphasize that this is an investment programme in the sense that funding is provided only for projects that are closely linked with the strategic goals for the sector and decisions are made consistently and coherently in ways that maximize benefits for any given cost level (based on a benefit/cost analysis). • Be sure to ensure that the board of FashionTT is accountable to ensure that the procurement process lead by the CEO is fair, transparent, assures highest value for money results, and that all potential conflicts of interest are avoided. • Be sure to include an Independent Selection and Advisory Body • Be sure to include a co-finance component for participating firms • Be sure to sign MOUs with exit or termination clauses and hold consultants and participating firms accountable for performance • Be sure to include a strong leadership development component by a professionally qualified leadership coach for the GVC programme members	• Be sure to avoid any activities that may (be perceived to) compromise the integrity of programme.

Scaling up or down options:

With more resources	With fewer resources
• Extend the intensity of involvement of the panel by including a component into the programme that allows for written reflections on progress and insights gained on theindustry	• Reduce the number of international experts

4.4.1.5 P4. Institute an Industry Intelligence and Innovation Function

Strategic Programmes For industry viability

1. Improve Market Access
2. Innovate Organizations & Operations
3. Assure Sector Coordination & Support
4. Well governed Strategic Investments
5. Institute an Industry Intelligence and Innovation Function
6. Actively Manage the Industry Strategy and Governance Process Policy

Programme Direction Statement (Outcomes & Impacts)

We communicate systematically with all local fashion sectors, related organizations and Industries, with a focus on identifying opportunities, trends and developments, locally, regionally, and internationally in all steps of the fashion industry value chain. We share the insights with all industry members and adapt our strategic investments in accordance with the insights gained.

Strategic Objective

Align strategic investments and industry participant actions with emerging opportunities and risks so as to achieve the biggest impact on the viability of the industry as a whole.

Principal Strategies

1. Commercialize existing R&D
2. Industry data collection & analysis (Trinidad and Tobago and international)
3. Industry research for investment & policy

Performance Indicators

Outcomes:

Output:

Through the application of existing R&D work, e.g. from CARIRI on fibres, the uniqueness of Trinidad and Tobago fashion is increased and thus competitiveness and desire for further investments in R&D strengthened – thereby increasing the viability of the industry.

Systematic linkages and intelligence gathering processes must be established and linked with the industry-wide strategy and intelligence committees, in order to distill and communicate emerging trends, opportunities and risks. This work must review the emerging information from within Trinidad and Tobago as well the regional and international developments – subscriptions, conference participations, study tours, data collection, etc will all be part of this effort. The linkages will be systematic and institutional so as to not only depend on individual relationships. The information must be disseminated through the local associations, TTCSI, and the established coordination and support channels of the Industry.

The information that is emerging should also be specifically applied through recommendations for how to adapt the Fashion Industry Investment Programme, the Industry coordination and support elements, and the governance of the programme.

4.4.1.5.1 S1. Industry Data (National and International) Collection and Analysis

Full Title	S1. Industry Data (national and international) collection and Analysis
Short Title	S1. Data collection and Analysis
Strategic Programme	P4.. Institute an Industry Intelligence and Innovation Function
Description	This Fashion Industry strategy was developed on the collection of primary industry data, including the first inventory of Fashion Industry constituents. The results of the research and the insights gained constitute an important milestone in industry data consolidation. In order to build industry viability basic data collection and analysis must continue. Information must be continually gathered about the local Fashion Industry, regional developments, and global changes in the Fashion Industry. The main mechanism to extend this work through this project is the systematic and persistent facilitation work to access and bring together existing information from the different institutions identified as sector members and support organizations. Industry relevant data and trend reports need to be purchased internationally and made available to industry players that are part of the FVCIP and beyond. Systematic linkages with the relevant organizations are to be established. The information that is being gathered through the data collection and analysis will be applied to evolve not only the FVCIP programme, which is handled internally by FashionTT, but to generate and manage strategic projects that are across implementation entities. The projects are coordinated by FashionTT but are directed by consultative industry groups or committees that include organizations beyond FashionTT. The primary expenditure here is through project officers whose primary job is to coordinate and support industry wide innovation projects. FashionTT needs to institute a regular forum for the fashion association, research & development, key support organizations, the FVCIP programme, other creative industries to come together and review trends and opportunities as they emerge. Collaboration with TTCSI is important as there are other service sectors that are facing the same issues and data sharing and initiatives could be synergized.

Action Plan

Objective	Principal Strategies & Measures	Performance Indicator (Outcomes)	Performance Indicator (Outputs)	Baseline Data	Target			Lead Organization	Support	Investment (annual TT$ '000)
					Year 1	Year 2	Year 3-5			
O12. To improve access to and availability of current and industry relevant data to local Fashion Industry	**S1. Industry Data (national and international) collection and Analysis** Design and implement a systematic industry data collection and information sharing system	Industry trend reports that are shared with all constituents	- Agreements for systematic information gathering and sharing established	- No formal industry data collection and analysis mechanism exists	Forum established 50% of agreements made	Forum working 100% of agreements made	Forum working 100% of agreements made	FashionTT	- TTCSI	50

Procurement

Item description	Month when needed	Quantity	From where to buy?	Estimated cost ('000)	Procurement Method	Procurement Schedule				
						Advertise	Submission of Bids	Bid Evaluation and recommendation approval	Contract award	Delivery
Consultant for data gathering and exchange network	June '15	1	Trinidad and Tobago	50	RFP	April	May	May	June '15	June '16

Monitoring & Evaluation

Priority Policies, Programmes and Projects	Goal(s)	Expected Outcome(s)	Evaluation Type (Frequency)	Planned Evaluation Completion Date (mm/yy)	Evaluation Method(s)	Entity Responsible for Evaluation
Industry Data (national and international) collection and Analysis	Institutional data sharing agreements and forum for discussion	Increased intelligence for industry leading to better decision making	Semi-annual	June '15	Progress reports	FashionTT

Main Tasks by Project Stage:

Initiation	Planning	Prepare	Execution & Monitor	Closure
• FashionTT executive and board determine expected outcomes and specify any conditions that need to be met • Outcomes and constraints are agreed with CEO	• Map stakeholders • Develop communication plan	• Start communication	• Establish data sharing agreement • Convene quarterly meetings for data analysis	• Lessons learned, including possible application to other industries • Identify mechanisms for sustainability of the process • Project Closure

Critical Success Factors:

Be sure to include	Be sure to avoid
• Institutional data sharing arrangements must be made with CSO, TTBS, and other important stakeholder organizations	• Be sure to avoid the harboring of industry information • Be sure to avoid inconsistent collection of data

Scaling up or down options:

With more resources	With fewer resources
• Develop an online custom database with semi-automated data sharing	• Collaborate with other institutions to obtain economies of scale required to consolidate data

4.4.1.5.2 S2. Commercialization of existing Research and Development

Full Title	S2. Commercialization of existing Research and Development
Short Title	S2. R&D Commercialization
Strategic Programme	P4. Institute an Industry Intelligence and Innovation Function
Description	Over the past decades Research & Development in natural fibres and other fields relevant for the fashion has been conducted within Trinidad & Tobago. This project seeks to make an inventory of the research in existence and to facilitate the identification of possible avenues for commercializing the existing knowledge. Through this project the designers are able to increase the variety of local input materials and thereby increase as well as highlight the uniqueness of the Trinidad and Tobago Fashion Industry and thereby increase the competitiveness of the industry as well as stimulate further investment in R&D. The combined effect of this project is the increase in viability of the industry.

Action Plan

Objective	Principal Strategies & Measures	Performance Indicator (Outcomes)	Performance Indicator (Outputs)	Baseline Data	Target			Lead Organization	Support	Investment (annual TT$ '000)
					Year 1	Year 2	Year 3-5			
O13. To increase the application of existing research and data derived from previous work.	**S2. Commercialization of existing Research and Development** - **Consolidate existing R&D to create comprehensive R&D inventory.** **Identify feasible R&D elements for commercialization**	Increased use in R&E culture and general of income existing R&D	- Relevant R&D inventory established - R&D commercialized	- No inventory of relevant existing R&D exists	Inventory established & Commercialization avenues established	50% of relevant R&D commercialization examined	100% of relevant R&D commercialization examined	FashionTT	- CARIRI	50

Procurement

Item description	Month when needed	Quantity	From where to buy?	Estimated cost ('000)	Procurement Method	Procurement Schedule				
						Advertise	Submission of Bids	Bid Evaluation and recommendation approval	Contract award	Delivery
Consultant for R&D Commercialization	June '15	1	Trinidad and Tobago	50	RFP	April '15	May '15	June '15	June 2015	June 2016

Monitoring & Evaluation

Priority Policies, Programmes and Projects	Goal(s)	Expected Outcome(s)	Evaluation Type (Frequency)	Planned Evaluation Completion Date (mm/yy)	Evaluation Method(s)	Entity Responsible for Evaluation
Commercialization of existing Research and Development	100% of relevant existing R&D commercialized	Increased competitiveness through distinct products	Quarterly	June 2016	Progress reports	FashionTT

Main Tasks by Project Stage:

Initiation	Planning	Prepare	Execution & Monitor	Closure
• FashionTT executive and board determine expected outcomes and specify any conditions that need to be met • Outcomes and constraints are agreed with CEO	• Map stakeholders • Develop communication plan	• Contact all research institutions	• Develop inventory of R&D • Classify according to areas and possible implementation areas • Examine paths for commercialization	• Lessons learned, including possible application to other industries • Project Closure

Critical Success Factors:

Be sure to include	Be sure to avoid
• Establish formal links with the research organizations • Develop strong communication programme to reach the researchers and stimulate disclosure of relevant research as some of it may not be readily commercialized but with some modifications and further development it could be achieved.	• Avoid ad hoc relationship with research organisations thus resulting in sporadic and irrelevant data / research priorities

Scaling up or down options:

With more resources	With fewer resources
• Invest in research and development	• Only conduct communication programme to identify opportunities for researchers to then pursue

4.4.1.5.3 S3. Industry Research for Investment and Policy Development

Full Title	S3. Industry Research for Investment and Policy Development
Short Title	S3. Research for Invest. & Policy
Strategic Programme	P4. Institute an Industry Intelligence and Innovation Function
Description	This project builds on the data gathering project. It has the same purpose as the data gathering project ("Data Collection and Analysis") but rather than limiting the work to gather existing information, in this project the aim is to generate new primary data through FashionTT's own research or contracted work.

Action Plan

Objective	Principal Strategies & Measures	Performance Indicator (Outcomes)	Performance Indicator (Outputs)	Baseline Data	Target			Lead Organization	Support	Investment (annual TT$ '000)
					Year 1	Year 2	Year 3-5			
O14. To strengthen the policy and decision making through the consistent collection and consolidation of new/ primary data.	**S3. Industry Research for Investment and Policy Development**	Improved understanding of Fashion Industry developments	- Primary research on Trinidad and Tobago Fashion Industry established	- No primary data research on industry	1 project	1 project	3 projects	FashionTT	- UWI - UTT	200

Procurement

Item description	Month when needed	Quantity	From where to buy?	Estimated cost ('000)	Procurement Method	Procurement Schedule				
						Advertise	Submission of Bids	Bid Evaluation and recommendation approval	Contract award	Delivery
Research contracts	Nov '15	1	University	200	RFP	Aug	Sept	Oct	Nov'15	Nov'16

Monitoring & Evaluation

Priority Policies, Programmes and Projects	Goal(s)	Expected Outcome(s)	Evaluation Type (Frequency)	Planned Evaluation Completion Date (mm/yy)	Evaluation Method(s)	Entity Responsible for Evaluation
Industry Research for Investment and Policy Development	Primary data research on Trinidad and Tobago Fashion Industry	Published research studies	Semi-annual	Nov 2016	Progress reports	FashionTT

Main Tasks by Project Stage:

Initiation	Planning	Prepare	Execution & Monitor	Closure
• FashionTT executive and board determine expected outcomes and specify any conditions that need to be met • Outcomes and constraints are agreed with CEO	• Map stakeholders • Develop communication plan • Review existing research and data	• Research plan that includes primary data collection	• Conduct research • Write paper and publish	• Lessons learned, including possible application to other industries • Identify mechanisms for sustainability of the process • Project Closure

Critical Success Factors:

Be sure to include	Be sure to avoid
• Primary data collection • Publication requirement to ensure peer review mechanism is built in	• Research based only secondary data

Scaling up or down options:

With more resources	With fewer resources
• Include international primary data (of special interest would be understanding of other fashion industries in Caribbean on a comparative basis)	Support only ongoing research that is co-financed by other institution (e.g MSc, MBA, PhD)

4.4.1.6 P5. Industry strategy and governance process policies

Strategic Programmes For industry viability

1. Improve Market Access
2. Innovate Organizations & Operations
3. Assure Sector Coordination & Support
4. Well governed Strategic Investments
5. Institute an Industry Intelligence and Innovation Function
6. Actively Manage the Industry Strategy and Governance Process Policy

Programme Direction Statement (Outcomes & Impacts)

We create the requisite policies for the Fashion Industry, monitor and evaluate both the outcome success as well as the governance process and proactively revise the policies to ensure continued success.

Strategic Objective

Proactively adapted policies that guide and assure the viability of the fashion industry.

Principal Strategies

1. Establish and review Fashion Industry policies
2. Monitor and evaluate outcomes achieved

Performance Indicators

Outcomes:

Output:

4.4.1.6.1 S1. Establish and Review Government Fashion Industry Policies

Full Title	S1. Review Government Fashion Industry Policies
Short Title	S1. Industry Policy Review
Strategic Programme	P5. Actively Manage the Industry Strategy and Governance Process Policy
Description	This industry strategy represents practical implementation of established government policy on diversification where the Fashion Industry has been identified as a priority sector. Through Government's establishment of CreativeTT and FashionTT it recognized the importance of having a coordinative and strategic investment mechanism for the industry as a whole. This strategy is therefore fully consistent with Government's policy. As experience with the implementation is accumulated it becomes very important for the Government to inform and evolve the policy framework through the convening of a multi-sectorial committee (composed of a wide cross section of stakeholder organizations) that is reviewing the results achieved and the policy framework. The Government will then need to review the conclusions and make the necessary adjustments to the policy and by implication the implementation plan. Completing this review work is critical for the viability of the Industry.

Action Plan

Objective	Principal Strategies & Measures	Performance Indicator (Outcomes)	Performance Indicator (Outputs)	Baseline Data	Target			Lead Organization	Support	Investment (annual TT$ '000)
					Year 1	Year 2	Year 3-5			
O15. To improve national policy aimed at developing the full potential of the local Fashion Industry	**S1. Review Government Fashion Industry Policies** - Review and amend existing polices - Develop/Introduce new relevant policy elements	Full policy cycle is executed to ensure the viability of the industry	- Existing Fashion Industry Policies Reviewed and augmented accordingly	- Policy direction is established	Review and introduce new policies	Continue to Review	Continue to Review	Ministry of Trade & Industry	- CreativeTT - TTCSI - Industry Associations	50

Procurement

Item description	Month when needed	Quantity	From where to buy?	Estimated cost ('000)	Procurement Method	Procurement Schedule				
						Advertise	Submission of Bids	Bid Evaluation and recommendation approval	Contract award	Delivery
Facilitation of stakeholder engagement for policy review	April '16	1	Trinidad and Tobago	50	RFP	Feb '16	March '16	March '16	April '16	May-June '16

Monitoring & Evaluation

Priority Policies, Programmes and Projects	Goal(s)	Expected Outcome(s)	Evaluation Type (Frequency)	Planned Evaluation Completion Date (mm/yy)	Evaluation Method(s)	Entity Responsible for Evaluation
Review Government Fashion Industry Policies	Policy Reviewed and updates	Policy direction that is optimally aligned for industry viability	Mid-term	April '16	Progress report	Ministry of Trade

Main Tasks by Project Stage:

Initiation	Planning	Prepare	Execution & Monitor	Closure
• Establish inter-agency committee • Agree to policy review approach	• Establish timeline and allocate responsibility • Identify policy documents / resources • Identify key stakeholder groups	• Consolidate policy documents • Develop communications mechanism for engaging key stakeholder group	• Facilitation of stakeholder engagement for policy review • Develop report and recommendations for agreed policy changes • Facilitate approval of policy changes • Communicate policy changes to key stakeholders	• Lessons learned, including possible application to other industries • Identify mechanisms for sustainability of the process • Project Closure

Critical Success Factors:

Be sure to include	Be sure to avoid
• Industry wide representation, and include all the organizations involved in the implementation to be heard and have a voice • Use current feedback and progress data from all strategy components	• Avoid individual industry stakeholders to dominate the evaluation perspectives put forward

Scaling up or down options:

With more resources	With fewer resources
• Include further primary data research and consultations	• Decrease the number of consultations held, but be sure to maintain quality of session to ensure receipt of relevant information

4.4.1.6.2 S2. Monitor and Evaluate Outcomes Achieved

Full Title	S2. Monitor and Evaluate Outcomes Achieved
Short Title	S2. M&E Outcomes
Strategic Programme	P5. Actively Manage the Industry Strategy and Governance Process Policy
Description	Monitoring and Evaluation of the strategic plan is an integral part of the policy cycle and the programme. Monitoring and Evaluation of the execution of the Implementation Plan will take place on a continuous basis to allow for course-correction initiatives, performance management issues and the overall attainment of the intended objectives. Relevant institution(s) will monitor and evaluate the inputs, activities and outputs to ensure that the strategic plan objectives are delivered in accordance with the implementation plan. Monitoring is an important tool to help make decisions aimed at improving performance, assessing whether the programme is on course and if it is likely to achieve intended objectives, ensure accountability, assess the use of resources and to monitor achievements of the intended outputs. The main purpose is to allow for evidence-based decisions with respect to any corrections in implementation. Evaluation of the plan will serve two main purposes: 1. To enquire into the feasibility of the plan 2. To assess the overall impact of the selected strategies.

Action Plan

Objective	Principal Strategies & Measures	Performance Indicator (Outcomes)	Performance Indicator (Outputs)	Baseline Data	Target			Lead Organization	Support	Investment (annual TT$ '000)
					Year 1	Year 2	Year 3-5			
O16. To ensure transparency and implementation of all programme projects and initiatives	**S2. Monitor and Evaluate Outcomes Achieved** - Develop M&E programme/mechanism to ensure course-correction initiatives, performance management issues and the overall attainment of the intended objectives	- Programme Assurance	- Monitoring & Evaluation Reports based on full analysis of all projects that are part of strategy	- Only high level policy review presently utilized	- Develop M&E Plan - Implement M&E	- Course - Correct - Continue M&E	- Course - Correct - Continue M&E - Close-Off	MTIIC	- CreativeTT - TTCSI - Industry Associations	50

Procurement

Item description	Month when needed	Quantity	From where to buy?	Estimated cost ('000)	Procurement Method	Procurement Schedule				
						Advertise	Submission of Bids	Bid Evaluation and recommendation approval	Contract award	Delivery
Consultant for M&E facilitation	April '16	1	Trinidad and Tobago	50	RFP	Jan'16	Feb 16	March '15	March '16	April—May '16

Monitoring & Evaluation

Priority Policies, Programmes and Projects	Goal(s)	Expected Outcome(s)	Evaluation Type (Frequency)	Planned Evaluation Completion Date (mm/yy)	Evaluation Method(s)	Entity Responsible for Evaluation
Review Government Fashion Industry Policies	Reviewed policy	Policy direction that tis optimally aligned for industry viability	Mid-Term	May '16	Progress report	MTIIC

Main Tasks by Project Stage:

Initiation	Planning	Prepare	Execution & Monitor	Closure
• Convene meeting to discuss and agree on M&E approach	• Prepare M&E framework	• Align plans and develop shared reporting template	• Implement and M&E mechanism • Review data and feedback • Identify high risk elements, establish and implement course-correction initiatives	• Lessons learned, including possible application to other industries • Identify mechanisms for sustainability of the process • Project Closure

Critical Success Factors:

Be sure to include	Be sure to avoid
• Be sure to have independent input into M&E process design • Be sure that there is consensus on evaluation criteria prior to implementation • Be sure to communicate with and engage key stakeholders in the design and implementation of ME& process	• Avoid any activity which may result in perceived bias of the process

Scaling up or down options:

With more resources	With fewer resources
• Engage independent consultant to design M&E framework and execute monitoring and reporting	• Develop policy internally, but consult with key agencies to ensure clarity of process and agreement to evaluation criteria.

4.5 Principal Strategies Portfolio

In the previous section strategies were presented within six (6) programmes. In order to be able to prioritize implementation action, one needs to know which strategies have the greatest relative benefits and what combination or portfolio packages of principal strategies would lead to the overall greatest benefit for any given level of investment.

To this end, this section presents the criteria that align all actions and that are used to evaluate the relative performance of the different strategies. Strategies should perform as well as possible on as many as possible. However, not all criteria are equally important and so the criteria, through them the scores, need to be weighted.

4.5.1 Criteria for alignment

While the Fashion Industry of Trinidad and Tobago is complex because there are many organizations involved, each with their own agenda and time line for action, and while the new strategy for the industry has many components, the overall thrust of the strategy is relatively simple and rests on a few dimensions that can be easily tracked. There will be many unexpected developments during the course of the implementation of the strategy and the following criteria should always be used to determine what combination of actions to take:

- ✓ **Costs**: This is not counting operational costs - only investment costs, for example by CreativeTT or FashiontTT, and other organizations specific to these Principal Strategies.
- ✓ **Viability**: To what extent does the Principal Strategy support the establishment of viable system elements? Not all programmes have an equally big or direct impact on Viability and what will be reflected in the weighting system.
- ✓ **Large Export Lead:** to what extent does the Principal Strategy promote the conditions of success for 2 firms from Trinidad and Tobago to succeed to achieve several order of magnitude greater sales internationally?
- ✓ **Growth Linkage**: to what extent does the Principal Strategy contribute to or provide the linkage and boundary that ensure that if Trinidad and Tobago has have two companies that really grow and lead through exports, there will be the pull for the others, and even in related sectors. The linkage is not about the two companies, but about how much others would grow if the two are successful because of the created linkage factor.
- ✓ **Depth & Strength**: To what extent does Principal Strategy support the development of wide 'pipeline' of designers – different stages of development and different target markets and styles. This is explicitly not considering the impact on the 2 high GVC exporters.
- ✓ **Probability of success (POS)** i.e. the probability of realizing the benefits of a Principal Strategy for the given resources. These probabilities are specified between 1 to 100. A value of 100 indicates 100% confidence in realizing the benefits given the resources, while a value of 0 would mean there is no confidence in realising the benefits. The probabilities are then translated into scaled preference values.

4.5.2 The portfolio

Figure 28 below provides a graphical representation of the Programme Portfolio Structure in the form of a ‘Cityscape” view. For each Programme, Principal Strategies are presented and ordered in such a way that the Status Quo (SQ), which represents the current approach, is always at level 1 – the lowest investment. Within each Programme the subsequent Principal Strategies, ‘going up the tower’, are cumulative in nature, meaning that with increasing amounts of funds, one would invest in more Principal Strategies, going higher up a tower (not only choosing a Principal Strategy from higher up a tower without investing in the lower levels of the programme). Within each Programme the Principal Strategies are presented in decreasing cost-benefit ratios.

Figure 28 below).

Figure 26: Programme Portfolio Structure (the 'Cityscape')

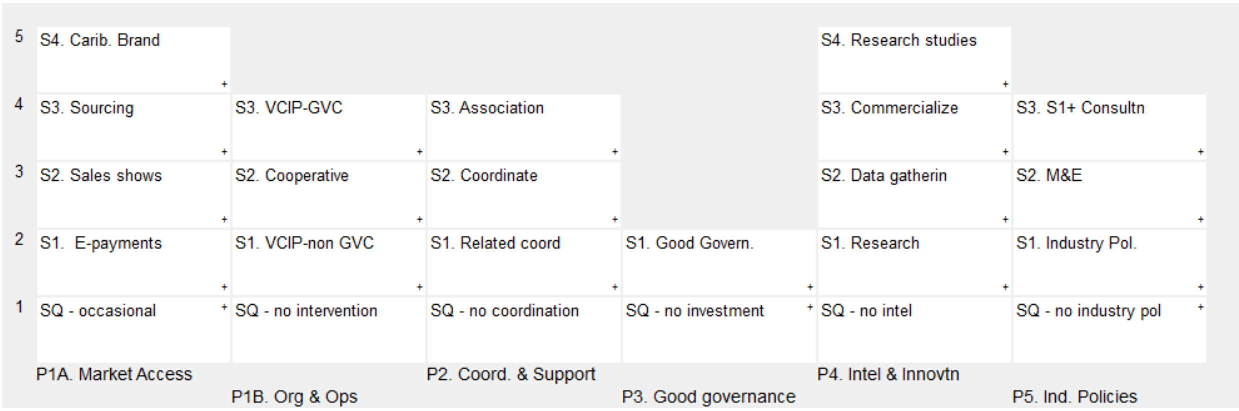


Table 8 presents the alignment criteria in two groups – costs and benefits. All the strategies have financial costs involved, and those are presented in comparable terms (TT$). The strategies are compared in their relative performance on all but one benefit criteria using relative preference scales. Probability of Success (POS) is first expressed in the estimated probability and that is then converted into preference scales. The end result is that one can see all measures are comparable to each other.

Table 8: The Criterion Structure – Costs and Benefits

Criterion Group	**Costs**	**Benefits**				
Criterion	**Costs**	**Viability:**	**Large Export Lead**	**Growth Linkage:**	**Depth & Strength:**	**Probability of success (POS)**
Scale	TT$ ‘000 per year	Relative preference scale 0-100	Relative preference scale 0-100	Relative preference scale 0-100	Relative preference scale 0-100	Probability translated into preference scales

The third step is to establish weights for the criteria. Two weights need to be determined: Within-Criterion Weights (WCW's) bring units of value across the different Programmes for a given Criterion onto a common scale. The WCW's represent the swing in value from 0 to 100 on the preference scale in one Programme as compared to another. The value difference represented by the Swing Weight can often be made clearer by asking assessors to “*consider the difference between the least and most preferred Principal Strategy and how much they care about that difference*."

There are no WCW's on the Cost side, because the same unit of value is used in all Programmes (TT$ per year in ‘000).

The second kind of weight is the Across Criteria Weights (ACW's), and these bring the scores for the different Criteria into a common unit. The ACW's are assessed by comparing the scales that have been given WCW's of 100, one scale is chosen for each Criterion. The scales given WCW's of 100 do not typically all fall in the same Programme, so it will be necessary to compare a 100-weighted scale in one Programme on a given Criterion with another 100-weighted scale in a different Programme for another Criterion. It is important to remember that it is the value of the 0-100 scale that is being compared and not just the 100 values. The results of this model have been explored for robustness through sensitivity analysis.

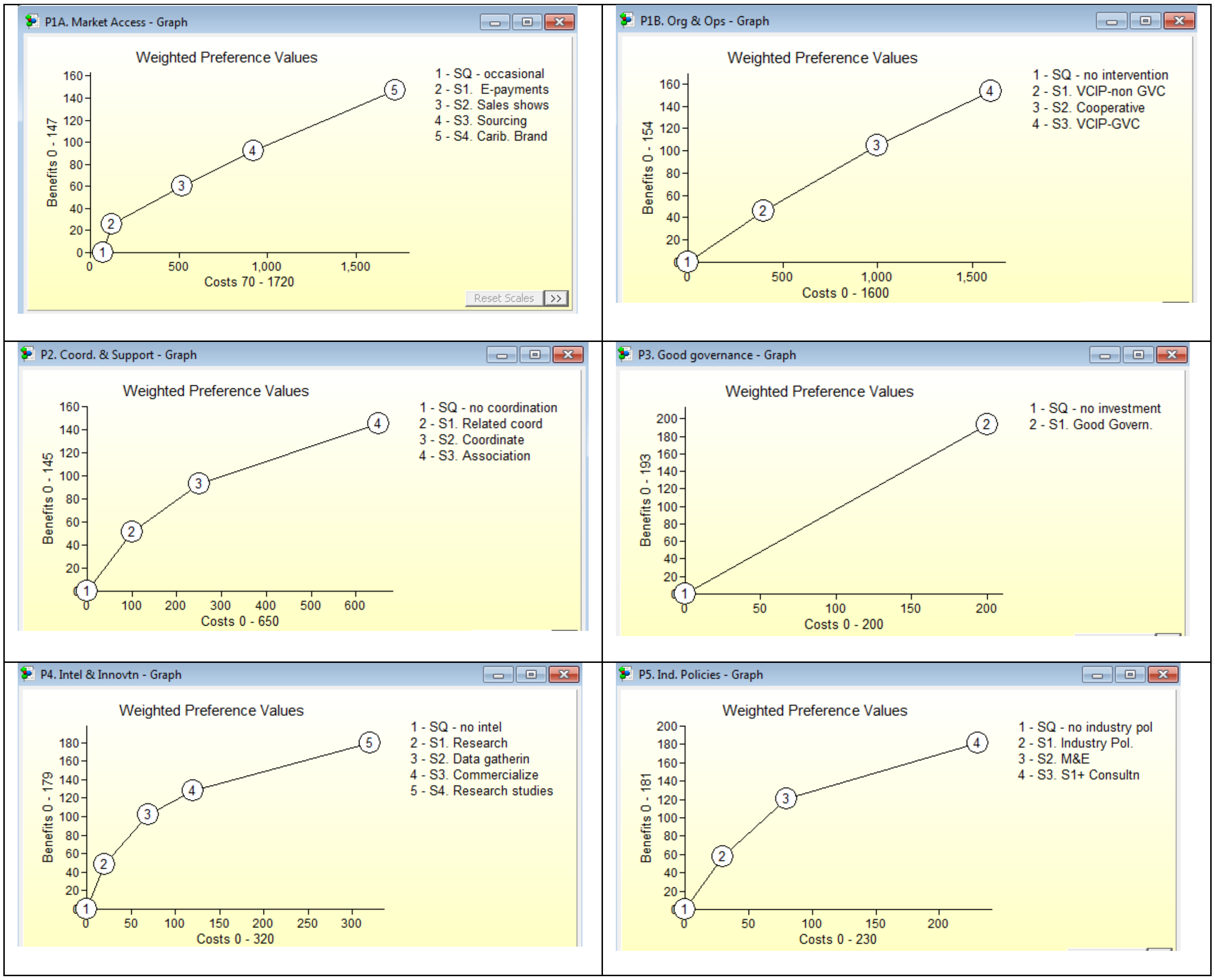
Figure 27: Criterion Weights - Within and Across Programmes

	Costs	Benefits				
	TT$ Investment	Viability	Large Export Lead	Growth Linkage	Depth & strength	Prob of Success
P1A. Market Access	-	40	100	90	40	100
P1B. Org & Ops	-	35	100	80	80	100
P2. Coord. & Support	-	100	30	100	50	100
P3. Good governance	-	100	100	100	100	100
P4. Intel & Innovtn	-	100	65	100	104	100
P5. Ind. Policies	-	128	116	70	50	100
Across Weights	100	80	100	100	70	70

The graph below (Figure 28) displays the costs vs. the benefits for the Principal Strategies. The slope of the graph leading to each Principal Strategy is the Benefit-to-Cost ratio (B/C). Mathematically, the Principal Strategy with the highest B/C ratio on the graph is the most beneficial for its cost, therefore providing the best value-for-money.

The graph for a Programme allows one to compare the cost-effectiveness of that Programme's Principal Strategies on a visual basis. The Principal Strategies with the steepest slopes, which when sorted will be at the bottom of the curve, have proportionally greater benefit-to-cost potential than those with flatter gradients (decreasing marginal returns).

Figure 28: Programme Benefit-to-Costs Graphs

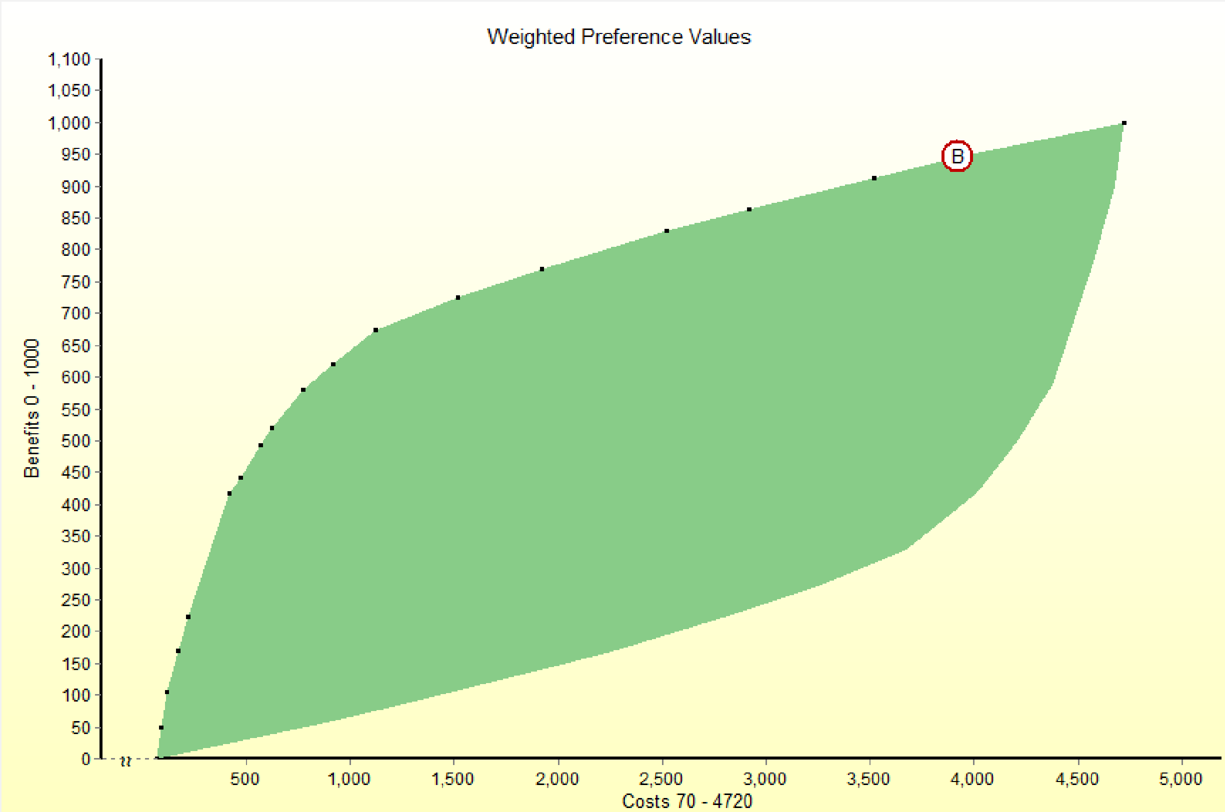


The Portfolio Envelope Graph shown in Figure 29 below highlights the combinations of the Principal Strategies.

The elliptically shaped area of the graph represents the plot of all the possible portfolio packages. The points on the upper surface of this area show the best portfolio of Principal Strategies for any defined resource. This is known as the **Efficient Frontier**. The Efficient Frontier is a monotonic curve of decreasing slope. This indicates that the highest benefit-to-cost options are at the bottom left of the curve and the ratio of the curve decreases towards the right.

The location marked by “B” on the envelope indicates the position of the chosen portfolio package for year 1.

Figure 29: Portfolio Envelope Graph



The Order of Priority graph shown in Table 9 below displays a list of Principal Strategies that appear in the Efficient Frontier in the order in which they should be resourced to maximise the benefits for any given resource. It provides a numerical representation of the Efficient Frontier of the Envelope Graph. Starting with a portfolio with the minimum Level in each Programme, Principal Strategies are added to the portfolio one at a time by maximising the incremental benefit-to-cost ratio.

Table 9: Order of Priority – sequence in which Principal Strategies should be resourced

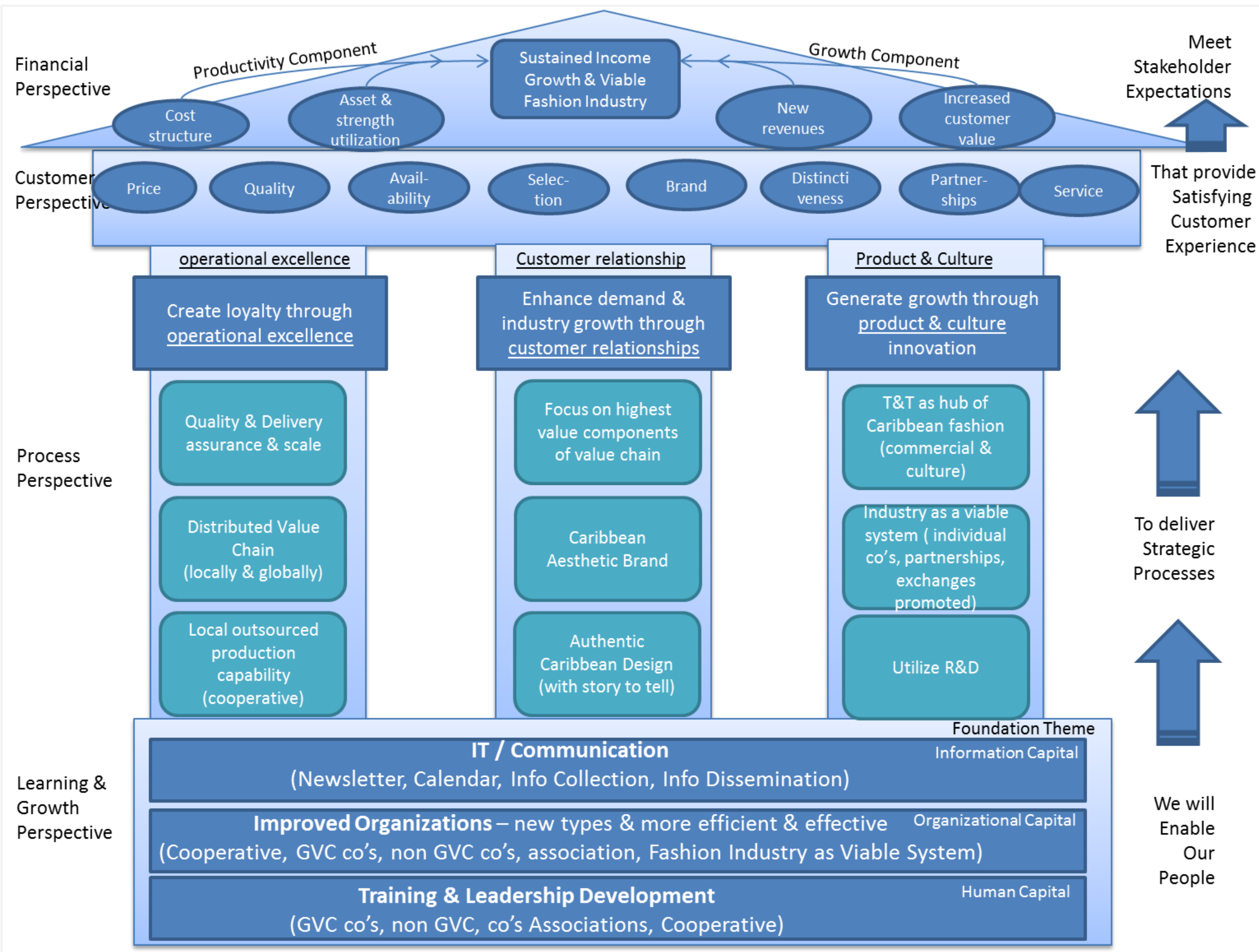
		Programme		Principal Strategy	Costs Inc	Costs Cum	Benefits Inc	Benefits Cum	Ratio
0	1	P1A. Market Access	1	SQ - occasional	70	70	0	0	-
0	2	P1B. Org & Ops	1	SQ - no intervention	0	70	0	0	-
0	3	P2. Coord. & Support	1	SQ - no coordination	0	70	0	0	-
0	4	P3. Good governance	1	SQ - no investment	0	70	0	0	-
0	5	P4. Intel & Innovtn	1	SQ - no intel	0	70	0	0	-
0	6	P5. Ind. Policies	1	SQ - no industry pol	0	70	0	0	-
1	5	P4. Intel & Innovtn	2	S1. Research	20	90	48	48	2.41
2	6	P5. Ind. Policies	2	S1. Industry Pol.	30	120	57	105	1.91
3	6	P5. Ind. Policies	3	S2. M&E	50	170	63	169	1.27
4	5	P4. Intel & Innovtn	3	S2. Data gatherin	50	220	55	223	1.09
5	4	P3. Good governance	2	S1. Good Govern.	200	420	193	416	0.97
6	1	P1A. Market Access	2	S1. E-payments	50	470	26	443	0.52
7	3	P2. Coord. & Support	2	S1. Related coord	100	570	51	494	0.51
8	5	P4. Intel & Innovtn	4	S3. Commercialize	50	620	25	519	0.50
9	6	P5. Ind. Policies	4	S3. S1+ Consultn	150	770	61	580	0.41
10	3	P2. Coord. & Support	3	S2. Coordinate	150	920	41	621	0.28
11	5	P4. Intel & Innovtn	5	S4. Research studies	200	1120	52	673	0.26
12	3	P2. Coord. & Support	4	S3. Association	400	1520	52	725	0.13
13	2	P1B. Org & Ops	2	S1. VCIP-non GVC	400	1920	45	771	0.11
14	2	P1B. Org & Ops	3	S2. Cooperative	600	2520	59	829	0.10
15	1	P1A. Market Access	3	S2. Sales shows	400	2920	34	863	0.08
16	2	P1B. Org & Ops	4	S3. VCIP-GVC	600	3520	49	913	0.08
17	1	P1A. Market Access	4	S3. Sourcing	400	3920	32	945	0.08
18	1	P1A. Market Access	5	S4. Carib. Brand	800	4720	55	1000	0.07

An assessment of the graph indicates the all programme initiatives may be initiated in the 2015 period while the Branding campaign can be initiated in 2016.

4.6 Strategy Map

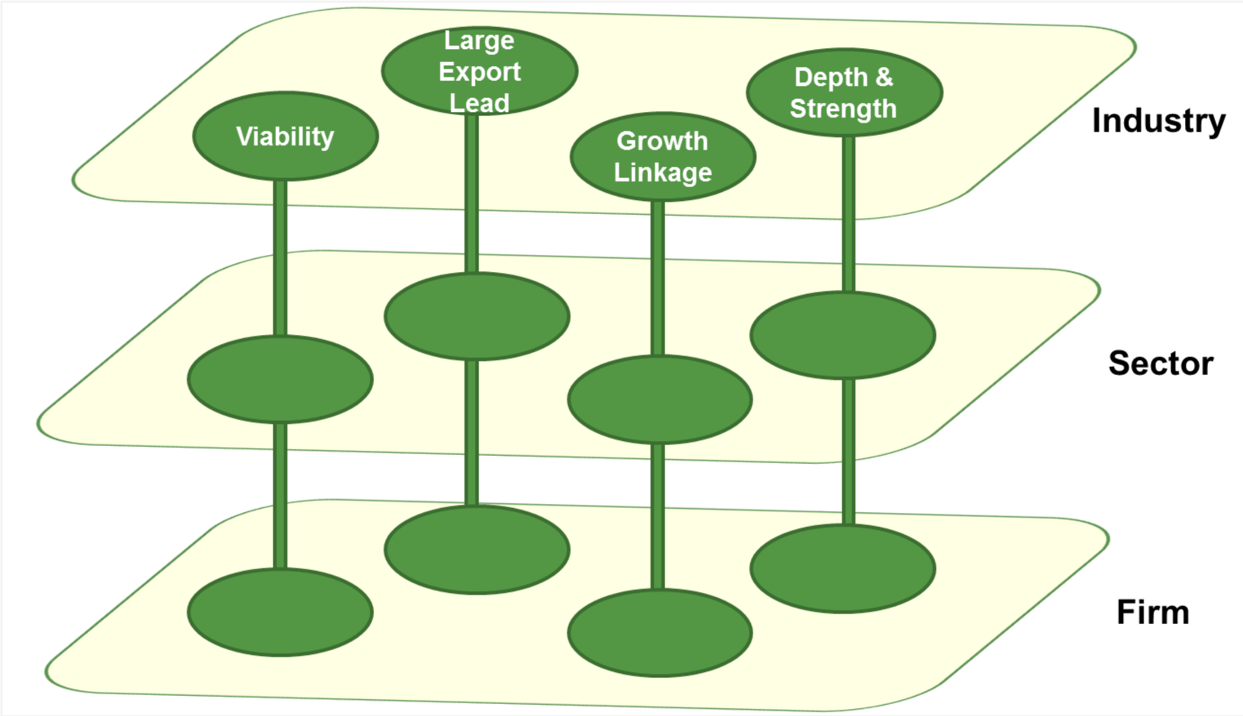
The Strategy Map presented in Figure 32 below, graphically communicates the primary strategic goals, areas for industry focus and the dimensions to be evaluated. It highlights the context within which the progress of the implementation of the strategy will be assessed.

Figure 30: Fashion Industry Strategy Map



The Strategy map helps to focus the efforts of the industry and ensure that the Fashion Industry as a whole will be strong and viable. Further, the strength and viability of the industry increases when member organisations are sufficiently aligned which makes it easier for synergies to develop. In this regard, the industry strategy needs to be translated and more focused. That is, the strategy should be filtered down through the industry, sector and firm levels and serves as reinforcing rods for the implementation of the strategy (see figure 33 below).

Figure 31: Strategic objectives as reinforcing rods



Specifically, Strategy maps should be made for each of the key institutions - MTIIC, CreativeTT, FashionTT and Fashion Associations - involved in the monitoring and implementation of the programmes and related projects.

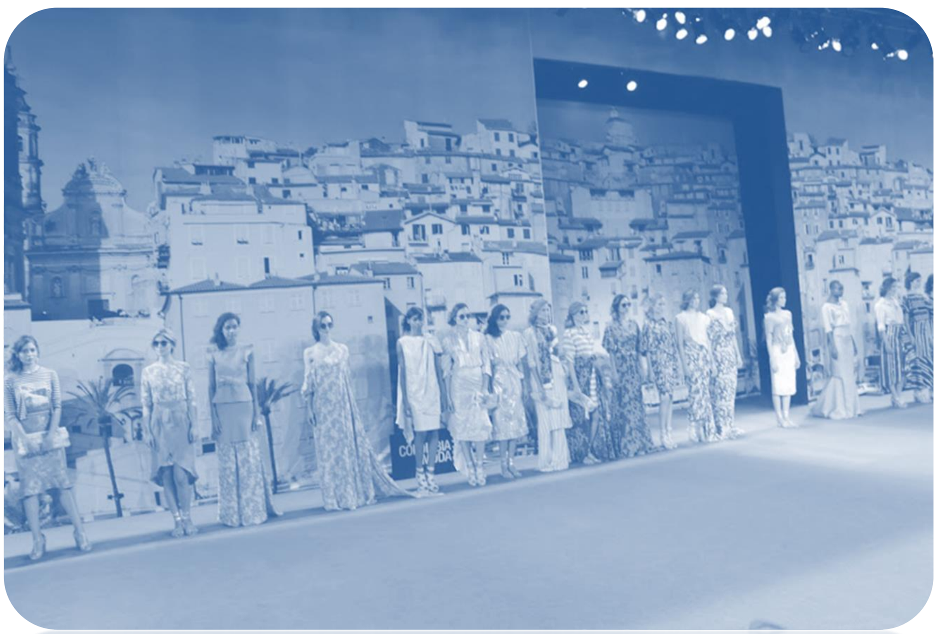
In case of the Fashion Association there is going to most likely three phases:

a. Working with all three associations in their current form;
b. The transition phase during the proposed merger;
c. Working with the newly formed association (if this suggestion is indeed implemented).

The Association(s) has / have an active part to play in the coordination of the Fashion Industry and will need to work particularly closely together with FashionTT and TTCSI. Particular focus should be paid to demonstrating and communicating clearly how the Fashion strategy helps them and how their actions support the Fashion Industry - for example particular emphasis on areas where there is a degree of interdependence.

Chapter 5

Quick Wins



CHAPTER 5- Quick wins

In this chapter, we identify several initiatives for quick wins – initiatives that can be achieved within a short period of time (2015), have a meaningful impact and are visible to the key industry players.

Quick wins serve to energize the industry players in the early stages of implementation and support sustained momentum and continuous motivation.

Strategic Initiative	Related Objective	Measure	Expected Impact
1. S2. Fashion & Trade Shows for Sales	O2.	Launch and host 1 National Annual Trade Show	Promotion of local designers, brands and increased sales
2. S3.Trade Events for Sourcing and Partnerships	O3.	Identify and support attendance to 1 B2B fashion event by 7 local fashion firms/ individuals	Diversification of sourcing locations and production partnerships for local designers
3. S4. Development of a "Caribbean Aesthetic" brand	O4.	Develop and issue Scope of Works / Request for Proposals for Branding	Create industry awareness for the desire to create a unique brand focused on the Caribbean Aesthetic
4. S1. Value-Chain Investment Programme (VCIP) – Non-GVC firm value chain step improvement	O5.	Develop and issue RFP for VCIP - Non-GCV project. Intention is to support at least 5 firms in Year 1	Create industry awareness for the Non-GCV project designed to improve access to the local Value Chain of firms
5. S2. Production Cooperative	O6.	Create project to design and facilitate the development of a Fashion-Production Cooperative that is locally owned	Direct engagement of sector players at all levels and improved fashion production capacity
6. S3. Fashion Value-Chain Investment Programme (FVCIP) – Global Value Chain Transformation	O7.	Design and implement a Global Value Chain Investment Programme. The intention is to support at least 1 partnership in Year 1	Fashion Industry stakeholders obtain a dedicated mechanism for accessing investment to make full use of the Global Value Chain (GVC)
7. S1. Related & Support Organization Coordination	O8.	Conduct a stakeholder mapping exercise and initiate dialogue to improve cohesion and increase collaboration synergies	Improved collaboration with key support players and increased ease of doing business by core Fashion Industry sectors
8. S2. Coordination	O9.	Develop an Annual Fashion	Improved direct engagement and

Mechanisms for Industry Members		Calendar, Create a Bi-Annual Industry Newsletter , Establish and launch an annual Industry recognition event	communication with key industry stakeholders
9. S3. Capacity Building for Industry Association	O10.	Engage key fashion association to design and implement an annual capacity development programme	Improved relationship with key industry influencers who can support and facilitate stakeholder buy-in for implementation activities
10. S1. Well Governed Strategic Investment Programme (Fashion Value-Chain Investment Programme- FVCIP)	O11.	Create and launch FCVIP with explicit participation criteria and ensure transparency through the establishment of an independent (preferably international) panel	Fashion Industry stakeholders obtain a dedicated mechanism for accessing investment as well as improved industry confidence in the transparency and governance of strategic direction and support activities
11. S1. Industry Data (national and international) collection and Analysis	O12.	Design and implement a systematic industry data collection and information sharing system	Direct engagement of sector players at all levels and increased access to industry data
12. S3. Industry Research for Investment and Policy Development	O13.	Develop project toward an improved understanding of Fashion Industry developments through primary research	Direct engagement of sector players at all levels and increased access to industry data
13. S1. Review Government Fashion Industry Policies	O14.	Initiative project to review and amend existing polices and engage stakeholders throughout full policy lifecycle.	Improved and explicit policy direction highlights seriousness of industry development and leads to increased stakeholder confidence and improved brand perception of MTIIC, CreativeTT and FashionTT by industry stakeholders
14. S2. Monitor and Evaluate Outcomes Achieved	O15.	Develop M&E programme framework for strategy implementation to ensure course-correction initiatives and performance management issues	Improved industry confidence in the transparency and governance of strategic direction and support activities

Chapter 6

Critical Success Factors

CHAPTER 6- Critical Success Factors

A plan is of little value by itself and this document represents the first step toward creating a high-performance, customer-focused Industry.

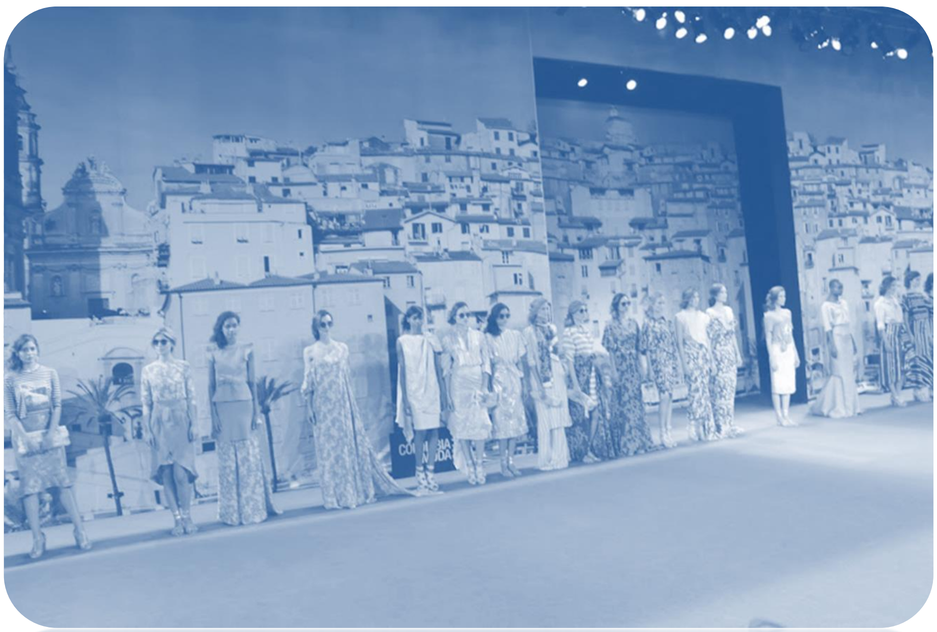
In additional to the success factors identified at the end of each Principal Strategy in Section 4.4, there are several broad based factors which are essential to achieve the desire future state of the Fashion Industry of Trinidad and Tobago. These are presented below:

- ***The plan must be owned and actively rolled out by Trinidad and Tobago Fashion Company Limited with strong support from CreativeTT and the Ministry***
- ***The plan should be reviewed periodically(annually) and amended as needed***
- ***There must be a governance structure in place that assures clear objectives, transparent decision making, disclosure of results, the use of international professionals for the selection panel(s), appropriate participation in decision making.***
- ***Accountability and responsibility for monitoring the implementation of the plan rests with the Ministry of Trade, Industry, Investments and Communications***
- ***Industry Buy-In and commitment is critical for implementation***
- ***Independent international perspectives and participation in project development and/or implementation is strongly recommended, when applicable***

As the Ministry with responsibility for oversight of the Trinidad and Tobago Fashion Company Limited, The Ministry of Trade, Industry, Investment and Communications is therefore encouraged to reference the strategic plan often and use it as one mechanism to continuously monitor, evaluate and report on their progress.

Chapter 7

Action Plan



CHAPTER 7- Action Plan

7.1 The Implementation Approach

The Strategic Issues and objectives identified serve as the foundation used for the development of the Strategic Implementation Plan **(Appendix 1).**

The development of the Implementation Plan took into consideration the following:

7.1.1 Phasing and Sequencing

The plan will be implemented using a phased approach over a five-year period (2015 – 2020). Depending on the nature of the initiatives and the availability of financial, physical and human resources, projects may run concurrently and/or consecutively.

7.1.2 Performance Management

The Trinidad and Tobago Fashion Company Limited in collaboration with the Ministry of Trade, Industry, Investments and Communications and the Trinidad and Tobago Coalition of Services Industries will continuously monitor and evaluate the implementation of the various initiatives of the plan through the establishment of standards and targets, measuring actual performance against initially set targets and reporting on the results.

7.1.3 Assumptions, Risks and Uncertainties

During the period of the implementation of this strategic plan, it is assumed that a reasonably stable and conducive political environment will exist. However, we are mindful that 2015 is an election year and thus flexibility is required to adapt to any changes in national policies that directly affect the Industry. Financial constraints may be an additional consideration, given the fluctuation of oil prices and the prospect of even further decline could result in budgetary shortfalls that are vital for the implementation of the strategic plan.

7.2 Monitoring Methodologies

Monitoring involves routine data collection and analysis of the success of the implementation of the plan. The results of the analysis will be used to inform decision-making at all levels. The objectives of the plan will be reinforced through corrective measures if and when necessary.

This will be achieved by:

1. Developing monitoring and evaluation indicators at all levels of implementation
2. Carrying out continuous data collection, analysis and monthly reporting to the Steering Committee
3. Carrying out random inspections and making objective observations
4. Conducting surveys and rapid assessments to evaluate progress
5. Carrying out participatory M&E involving stakeholders
6. Establishing improvement teams
7. Facilitating independent assessments and reviews of programmes as required.

7.3 Evaluation Mechanism

The strategic plan will be evaluated during and after implementation to ensure that it produces the intended results. The plan should be evaluated using relevance, efficiency, effectiveness, and sustainability and impact measures. A logical framework will be developed for each strategic objective showing the expected outputs, activities, means of verification, activity owners, timeframe and resource requirements to help track and monitor progress in the implementation of the plan.

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7.4 Appendix 1 – Consolidated Strategic Implementation Plan

Strategic Programme	P1A. Improve Market Access - Market Access and Facilitation for Sales									
Expected Impact	Increased access and penetration to international markets by local fashion firms resulting in improved sales									
Objective	Principal Strategies & Measures	Performance Indicator (Outcomes)	Performance Indicator (Outputs)	Baseline Data	Target			Lead Organization	Support	Investment (annual TT$ '000)
					Year 1	Year 2	Year 3-5			
O1. To increase global reach of local firms through the improvements of e-business transactions /e-commerce	**S1. Enable E-Business Operations** - Collaborate with commercial banks to allow e-payment system	Online credit card payment introduced in Trinidad and Tobago	- MOU with commercial banks - Number of banks to sign MOR and allow e-payments	Online credit card processing not possible in Trinidad and Tobago (only transactions through Paypal and other progs)	0	50%	100%	CreativeTT	- TTCSI	
O2. To provide a forum for designers to increase their visibility and market their products	**S2. Fashion & Trade Shows for Sales** - Host Fashion Trade Shows to promote designers, brands and increase sales	Consolidated financial value of sales and orders	- At least 1 national trade show annual - Combined sales at Fashion and Trade Shows - Number of firms	None base data available	Top 10% of firms to participate (approx.. 7 firms)	50% of participating firms have sales orders	90% of participating firms have sales orders	FashionTT		400

			participation - Participation at >3 consecutive shows							
O3. To improve access to the supply, production and distribution elements of the Fashion value chain	**S3.Trade Events for Sourcing and Partnerships** - Identify and support attendance to BSB fashion events by local fashion firms/ individuals	Diversity of sourcing locations and production partnerships	- Number of B2B events attended - Number of partnerships created - Number of firms repeated participation	No base data available as this has not been in focus to date	7 selected firms participate	80% have new sourcing markets	100% have new sourcing markets	FashionTT		400
O4. To create a strong brand aimed at promoting Trinidad and Tobago Fashion and its various constituents	**S4. Development of a "Caribbean Aesthetic" brand** - Develop and issue cope of Works / RFP for Branding Project and hire consultant/firm	Increased Reference to "Caribbean Aesthetic" in intl & local industry copy	- RFP developed and tendered. - National branding campaign developed and implemented - Campaign in Trinidad and Tobago, Region, and	No consistent collective branding or positioning for the Fashion Industry	RFP developed and tender awarded and project executed	Short Term wins (Branding and Promotional activities) initiated	Review and revamp Branding and promotional activities initiative in Y2	FashionTT		800

			most importantly in extra Caribbean target markets							
Strategic Programme	**P1B. Innovate Organizations & Operations**									
Expected Impact	Increased access and improved use of the local fashion value chain elements aimed at improved firm productivity and profitability									
Objective	**Principal Strategies & Measures**	**Performance Indicator (Outcomes)**	**Performance Indicator (Outputs)**	**Baseline Data**	**Target**			**Lead Organization**	**Support**	**Investment (annual TT$ '000)**
					Year 1	**Year 2**	**Year 3-5**			
O5. To improve the use and access of the local fashion value chain by constituents	**S1. Value-Chain Investment Programme (VCIP) – Non-GVC firm value chain step improvement** - Develop RFP for VCIP - Non-GCV project	Improvement of the local Value Chain of firms	- RFP for VCIP – Non GVC developed and tended Consultants for value chain step improvement hired	No current support for Fashion Industry firms	5 firms	5 firms	15 firms	FashionTT	- TTCSI - Industry Associations	400

			- Local Value chain steps improved							
O6. To increase local garment manufacturing capacity	**S2. Production Cooperative** - Create project to design and facilitate the development of a Fashion-Production Cooperative that is locally owned	- Outsourced production possible in Trinidad and Tobago (sample & local run productions)	- Cooperative established	Limited / No production outsourcing possibility in Trinidad and Tobago	0	1	1	TTCSI	- FashionTT	600
O7. To improve access and use of the global fashion value chain by constituents	**S3. Fashion Value-Chain Investment Programme (FVCIP) – Global Value Chain Transformation** - Develop and implement a Global Value Chain Investment Programme aimed at exploiting the global value chain	Firms making full use of the Global Value Chain (GVC)	- Fashion Value-Chain Programme – GCV transformation developed and implemented - Number of strategic partnerships	Currently international outsourcing done primarily for domestic market sales. - Highest export volume by a single fashion	1 partnership $2m	2 partnerships $4m	4 partnerships $8m	FashionTT	- EximTT - ExportTT - TTCSI - Business Chambers	600

			established - Volume of export sales	apparel designer less than TT$1m							
Strategic Programme	**P2. Assure Sector Coordination & Support**										
Expected Impact	Increased cohesion and cooperation amongst industry sectors; Increased exploitation of synergies										
Objective	**Principal Strategies & Measures**	**Performance Indicator (Outcomes)**	**Performance Indicator (Outputs)**	**Baseline Data**	**Target**			**Lead Organization**	**Support**	**Investment (annual TT$ '000)**	
					Year 1	**Year 2**	**Year 3-5**				
O8. To improve the collaboration and overall working relationship with related and support organizations	**S1. Related & Support Organization Coordination** - Engage and promote collaboration with key support players eternal to the core Fashion Industry	Alignment of support and opportunities	- Systematic Linkages developed	Very Limited / No coordination mechanisms exists	70%	90%	100%	FashionTT	- TTCSI - Industry Associations	100	
O9. To achieve alignment of local industry activity with international	**S2. Coordination Mechanisms for Industry Members** - Develop an Annual	Trinidad and Tobago industry	- Annual Fashion Calendar	No formal coordination	Calendar-100%	Calendar Newsletter	Calendar	FashionTT	- Industry Associatio	100	

market cycles and key events as well as maximization of local sector integration possibilities.	Fashion Calendar - Create a Bi-Annual Industry Newsletter - Establish an annual Industry recognition event - Design mechanism for sharing resources	activity aligned with international market cycles	developed - Bi-Annual Industry Newsletter produced - Creation and hosting of annual Industry recognition event - Mechanism for sharing resources established	mechanisms and industry event exist for the Fashion Industry	Newsletter -100% Resource Sharing Facility - 50%	Resource Sharing Facility- 50% Recognition event- 100%	Newsletter Resource Sharing Facility Recognition event		ns	
O10. Improve the competency, skills, reach and impact of the Fashion Industry Associations	**S3. Capacity Building for Industry Association** - **Design and implement an annual training programme**	- Improved Local sector integration and viability through strengthened industry association	- Capacity Building Programme for Associations Developed and Implemented	- Three industry associations that are each working individually to become viable.	Creation of 1 viable industry association 50% of capacity development programme	100% of capacity development programme		TTCSI	- FashionTT	400

Strategic Programme	**P3. Well-governed Strategic Investments**									
Expected Impact	Improved capacity and export readiness of local firms; significant penetration into the international market									
Objective	**Principal Strategies & Measures**	**Performance Indicator (Outcomes)**	**Performance Indicator (Outputs)**	**Baseline Data**	**Target**			**Lead Organization**	**Support**	**Investment (annual TT$ '000)**
					Year 1	**Year 2**	**Year 3-5**			
O11. To create a direct funding mechanism aimed at supporting export-ready firms	**S1. Well Governed Strategic Investment Programme (Fashion Value-Chain Investment Programme-FVCIP)** - Create and launch FCVIP with explicit participation criteria and ensure transparency through the establishment of an independent (preferably international)	Explicit criteria, professional judgment, no conflict of interest, increased accountability	- FVCIP established and launched - Published Criteria, - Independent Panel - Monitoring reports	- No FVCIP investment programme is in operation	1 well-governed investment programme	1 well-governed investment programme	1 well-governed investment programme	FashionTT	CreativeTT	200

	panel									
Strategic Programme	**P4. Institute an Industry Intelligence and Innovation Function**									
Expected Impact	Improved understanding of international and national trends in relevant to the Fashion Industry and application of in to the value chain									
Objective	Principal Strategies & Measures	Performance Indicator (Outcomes)	Performance Indicator (Outputs)	Baseline Data	Target			Lead Organization	Support	Investment (annual TT$ '000)
					Year 1	Year 2	Year 3-5			
O12. To improve access to and availability of current and industry relevant data to local Fashion Industry	**S1. Industry Data (national and international) collection and Analysis** - Design and implement a systematic industry data collection and information sharing system	Industry trend reports that are shared with all constituents	- Agreements for systematic information gathering and sharing established	- No formal industry data collection and analysis mechanism exists	Forum established 50% of agreements made	Forum working 100% of agreements made	Forum working 100% of agreements made	FashionTT	- TTCSI	50
O13. To increase the application of existing research and data derived	**S2. Commercialization of existing Research and Development** - **Consolidate**	Increased use in R&E culture and	- Relevant R&D inventory	- No inventory of relevant	Inventory establishe	50% of relevant	100% of relevant	FashionTT	- CARIRI	50

from previous work.	**existing R&D to create comprehensive R&D inventory.** - **Identify feasible R&D elements for commercialization**	general of income existing R&D	established - R&D commercialized	existing R&D exists	d & Commercialization avenues established	R&D commercialization examined	R&D commercialization examined			
	S3. Industry Research for Investment and Policy Development	Improved understanding of Fashion Industry developments	- Primary research on Trinidad and Tobago Fashion Industry established	- No primary data research on industry	1 project	1 project	3 projects	FashionTT	- UWI - UTT	200

Strategic Programme	**P5. Industry strategy and governance process policies**									
Expected Impact	Increased governance and viability of the Trinidad and Tobago Fashion Industry.									
Objective	Principal Strategies & Measures	Performance Indicator (Outcomes)	Performance Indicator (Outputs)	Baseline Data	Target			Lead Organization	Support	Investment (annual TT$ '000)
					Year 1	Year 2	Year 3-5			
O14. To improve national policy aimed at developing the full potential of the local Fashion Industry	**S1. Review Government Fashion Industry Policies** - Review and amend existing polices - Develop/Introduce new relevant policy elements	Full policy cycle is executed to ensure the viability of the industry	- Existing Fashion Industry Policies Reviewed and augmented accordingly	- Policy direction is established	Review and introduce new policies	Continue to Review	Continue to Review	Ministry of Trade & Industry	- CreativeTT - TTCSI - Industry Associations	50
O15. To ensure transparent and implementation of all programme projects and initiatives	**S2. Monitor and Evaluate Outcomes Achieved** - Develop M&E programme/mechanism to ensure course-correction	Programme Assurance	- Monitoring & Evaluation Reports based on full analysis of all projects	- Only high level policy review presently utilized				Ministry of Trade & Industry	- CreativeTT - TTCSI - Industry Associations	50

	initiatives, performance management issues and the overall attainment of the intended objectives		that are part of strategy							

7.6 Appendix 2 – Direct Stakeholder Engagements

7.6.1 Consultative Group Members

Organization	Name	Name (Alternate)
1. **Fashion Association of Trinidad and Tobago**	Jason Lindsay, Chairman	Shauna Grant , Director
2. **Fashion Entrepreneurs of Trinidad and Tobago**	Lynette Headley Artherly, President	Ria Gray-Denoon, Director
3. **Ministry of Trade, Industry, Investment and Communications** 4.	Mario Romany, Industry Specialist	Kara Enightoola, Business Facilitator
5. **Designer United Stores**	Ashley Christmas, President	Meisha Trim
6. **Trinidad and Tobago Manufacturers Association**	Liza Miller, Designated Representative	Giselle Roberts.
7. **University of Trinidad and Tobago**	Sandra Carr, Fashion Design Coordinator/Programme Leader	Lisa Sinanan
8. **Trinidad and Tobago Creative Industries Company Limited**	Mr. Ronald Bhola, Director	Ms. Donna Chin Lee, Chairman
9. **Trinidad and Tobago Chamber of Industry and Commerce**	Liza Miller, Designated Representative	
10. **Trinidad and Tobago Bureau of Standards**	Nirmala Matmungal, Standards Officer I	Renee Abass, Head, Laboratory Services Division
11. **National Training Agency**	Steisha Monderoy	
12. **Ministry of Labour and Small and Micro Enterprise Development**	Quweina Roberts, Project Analyst	
13. **Cultural and Creative Industries, Economic Development Board Secretariat, Ministry of Planning and Sustainable Development**	Malene A. Joseph, Associate Professional	
14. **Trinidad and Tobago Coalition of Services Industries**	Chief Executive Officer	Project Coordinator

7.6.2 Meetings and Events

Several stakeholder meetings and events were hosted at various intervals throughout the project. In these engagement initiatives we sought to:

- ✓ Dialogue with various stakeholders with a vested interest in the Fashion Industry.
- ✓ Identify and understand the issues that matter most to the industry stakeholders
- ✓ Help shape and drive the long-term sustainability of Trinidad and Tobago's Fashion Industry
- ✓ Increase stakeholder buy-in and support for systemic change towards sustainable development

In addition to the Consultative Group Working Sessions, the following engagements were also conducted:

- ➔ A *Strategic Focus Session* hosted on 25th February, 2014
- ➔ A *Focus Session* with the Consultative Group hosted on 25th March, 2014
- ➔ A *National Stakeholder Consultation* hosted on 11th June, 2014
- ➔ A second *National Stakeholder Consultation* hosted on 23rd July, 2014

These sessions sought to engage the various individuals, organizations and associations involved in the Fashion Industry who have a vested interested interest in its development and sustainability.

7.6.3 Stakeholder Interviews

Semi-structured interviews were conducted to gain enhanced clarity of the functions, roles, operations, interests, concerns, desires and needs of individuals, organizations and associations involved in the Fashion Industry. Interviews, of about 1.5 hours each, were conducted with thirty-seven (37) stakeholders (local and international). The list of persons interviewed for this project is provided below.

7.6.3.1 List of International Stakeholders Interviewed

Name	Organization / Designation
1. Cecil John Howel	Fashion Recruiting by Cecilio, Asia
2. Andrew Madan Ramroop	Maurice Sedwe / Savile Row Academy
3. Mel Simon	Brooklyn Clothing Lab
4. Renato Palmi	South Africation Clothing Textile Fashion Sector
5. Steven Daniel	Fashion Designer
6. Kristiann Boos	Victory Patterns
7. Freddie Leiba	Freddie Leiba Inc.
8. Tabitha St. Bernanrd	Tabi Just
9. Hermann Kreither Olivares	Ashton International Trade - Chile
10. Romero Bryan	Fashion Designer

7.6.3.2 *List of Local Stakeholders Interviewed*

Name	Designation	Institution / Brand
1. Heather Jones	Principal / Artistic Director	Heather Jones International
2. Meiling Esau	Owner / Creative Director	Meiling Inc. Limited
3. Candice Bacchus	Owner / Director	Simply Runway
4. Christopher Nathan	Former Chairman	Fashion Association of Trinidad of Tobago
5. Noorulain Agha	Owner / Managing Director / Creative Head	Noor
6. Charu Lochan Dass	Design Director	CLD
7. Adrian Foster	Creative Director	AF
8. Jennifer Grant	Pattern Maker / Designer	Moné Studio
9. Lisa See Tai	Chief Executive Officer / Creative Director	Lisa See Tai
10. Patricia Khan	Former Head of Investment Promotion	e TecK
11. Violet Davis-Maurice	Lecturer (Textiles)	University of the West Indies
12. Annette Rahael	Former Director	Queensway Fashion Fabric Store
13. Deron Attzs	Chairman	San Fernando Fashion Week
14. Robert Young	Designer/Director	The Cloth
15. Gregory & Coline Mills	Creative Director	Millshouse Company Limited
16. Arnold Best	Managing Director	Caruna Limited
17. Janouras Custom Designs	Financial Comptroller	Matthew Leach
18. Liza Miller	Chief Executive Officer	Kaj Designs Limited
19. Jacqueline Charles	Chief Executive Officer / Creative Director	Koko Karibi Designs
20. Shurnel Oliviere	Chief Executive Officer	Oliviere Investment Ltd.
21. GrantandGajadhar	Directors	Grant and Gajadhar Limited
22. Derrick Lewis	Founder and Creative Director	Island People Mas
23. Carla Foderingham	Chief Executive Officer	Trinidad and Tobago Film Company
24. Richard Young	Chief Executive Officer	Mannequins Caribbean Ltd.
25. Ronald Joseph	Public Relations Officer	The Carnival Institute of Trinidad and Tobago
26. Dr. Suzanne Burke	Lecturer, Cultural Studies`	University of the West Indies
27. Lynda Osborne	Fashion Designer	Lynda Osborne

7.6.4 Stakeholder Data

A *Stakeholder Data* exercise was conducted and will form the basis for a separate project, aimed at developing an interactive and value-adding database for the local Fashion Industry.

The number of stakeholders contacted for the purpose of inclusion in the *Stakeholder Data* has been much greater than the personal interviews. As of 31st July 2014, we have been able to speak with one hundred and nineteen (119) stakeholders.

7.7 Appendix 3 - Illustrative Companies

7.7.1 Analysis of a Sample of Organizations

Three entities will be analyzed in this section: Heather Jones International, Sacha Cosmetics Ltd and Noor, an upcoming label in Trinidad and Tobago by young designer, Noorulain Agha. Similarities and divergent experiences between more established and emerging designers/fashion stakeholders will be highlighted.

Heather Jones, one of the country's iconic designers with an eponymous label, specializes in evening wear for women between the ages of 25 to over 60, caters to a mature clientele as well as graduation and special occasion dresses for teenagers. In existence for decades, Heather has built up a reputation for excellent fit and beautifully crafted, exquisite gowns.

Heather has many members of staff who have been working with her for a long time. The range is from 8-17 years. If Heather has large orders to fill, such as uniform orders to do for an office, in addition to her regular workers, she has additional resource personnel she can use. In that case, she may have over 25 people working with her. The additional resource personnel comprises private operators working out of their homes. In terms of loyalty and finding skilled staff, Heather is fortunate to have reliable staff members who have worked with her for some considerable time, unlike many other designers' experiences. Despite her good fortune in this regard, she corroborated what many other Fashion Industry professionals lamented, that finding reliable technical workers with a good work ethic is very difficult to find, so that it becomes imperative to maintain long-standing employees.

Even though she is well-established, like other local designers Heather finds herself invariably becoming involved in many of the stages of the operating processes of her business. When filling orders she must decide whether the order can be filled in-shop or whether outsourcing is needed. Heather prepares the sketch, produces the technical work sheet, collaborates on a one-to-one basis with the person producing the garments, even when it is outsourced. Everything has to be decided before production starts. She does all the production preparation for the work to be produced, including textures, working with the artist to produce the fabric, the process of pressing, pattern-making, etc.

Labour issues are related to production and manufacturing capacity. For large uniform orders, such as for Caribbean Airlines, the designer is required to manufacture outside of Trinidad and Tobago. In this case her choice is China, using several factories. Heather's success in the domestic market and abroad does not preclude her from experiencing manufacturing challenges like her other counterparts in the industry. Chinese factories willing to produce such small quantities have to be carefully selected, since the minimum orders in China would exceed what would be considered a large order by Trinidad and Tobago standards.

Other manufacturing issues plague the designer nonetheless. In terms of her ability to realize a fuller export potential, Heather Jones faces financial constraints for expanding the range of products she currently produces. While the designer is renowned for her evening wear, she is far more versatile and would like to venture into soft furnishings for interior design, designer shoes and perfume. At present, 75% of her revenue comes from the sale of clothing and 25% from interior design. Her international exposure, particularly in Europe has afforded her many invaluable contacts and potential alliances which, for lack of funding she has been unable to explore thus far. One of the possible ventures includes her idea of turning her hand-painted fabrics into lace to be manufactured overseas. While the idea is a novel one, it requires capital for the prototype. She is currently working with someone in China to make this a reality. The manufacturers' representative in China can source the person who can make this project come to fruition. As a result of her repeated exposure to Italy, she has signed MOUs to do Italian leather shoes. She would be responsible for the design of the shoes using the person's platforms. A similar MOU was signed with Acqua D'Ell Elba to do perfume. However, a lack of funding has stalled these initiatives. Insufficient capital was often cited as a major hindrance to expanding production capacity and subsequently the export base for most designers.

Finance is also needed to upgrade her plant and technical machinery. Like other designers, Heather is also in need of better machinery for more professional cutting operations. She requires computer software for cutting fabric, so that she can cut by laser to avoid leaving marks on the fabric as opposed to cutting by hand. The value of having such high performance equipment is to allow the machine to detect any flaws in the fabric. Computer-aided cutting can produce welted pockets in less time than individual workers. Machines can do it in far less time and with greater precision than manual labour. Machines are also needed to produce waistbands. She currently uses basic industrial machines, hemmers and surgers. Like Heather, many other designers spoke of the prohibitive costs of acquiring CAM/CAD machines.

With regard to funding she felt that the financial climate in Trinidad and Tobago was not particularly good for investing in creative businesses, as they are deemed high-risk. From her own personal experience, she felt that banks were generally hostile towards entrepreneurs in the creative industries, as they still asked for collateral even in the presence of a firm contract. It also did not matter that she was established, as she faced the same reluctance to receive funding.

In terms of technology, the designer utilizes social media and her website to connect with both her domestic and offshore clientele. She connects with her customer segments through direct sales, accounting for 35% of her revenue, website and social media – 40% and international fashion and trade shows-25%. Maintaining her website is extremely costly. Because of the nature of fashion, which is highly dynamic and constantly evolving, the images that appear on a website involve paying stylists, models and photographers. For emerging designers, websites are too costly to start up and maintain. E-commerce would greatly enhance her financial transactions with overseas customers as well.

Over the years the designer has benefitted from great international exposure. Her designs are currently available in Japan and in eight stores in the U.S. (Little New York) through San Francisco Enterprise Inc.

Her bridal gowns have also been carried in a bridal shop in Italy. She uses a buying agent in Switzerland (Natalia Dodi-Migliorini-Green Pebbles), who finds trade shows for her to attend and who is an excellent marketing source. Heather's success on the international market affords her the possibility of having overseas stores carry her clothing and using an international buying agent based in Europe. There are very few industry professionals who have these facilities available to them. Despite her international success and exposure, Heather encounters difficulty in finding other forms of tangible support from the public and private sector, such as promotional material for overseas shows.

There is a general lack of understanding of the industry by public and private sector officials, as well as financial institutions. At the governmental level, there is often a lack of follow-up support for designers to return to fashion and trade shows. When it comes to repeat funding there is failure on the part of the government to comprehend that designers need to show more than once to be taken seriously on the global market.

There also needs to be greater opportunities for all Fashion Industry professionals, whatever their level of export readiness. To give more visibility to the fashion sector, fashion retail spaces need to be opened up where people can source local garments such as those in the malls in Baranquilla, Colombia. Many stakeholders interviewed for this project, were of the view that a local retail fashion space was needed to capitalize on the 'Buy Local, Support Local' wave that that is taking place tacitly across the country.

The second sample oganization is **Sacha Cosmetics Ltd**., the premiere cosmetics company in the English speaking Caribbean. While not part of the core Fashion Industry, it is nonetheless an exportable product that is part of the allied industries that support the main elements of the Fashion Industry in the same manner as accessories for example. The company was founded 35 years ago and employs 182 people. It currently exports to 27 foreign markets. In Cuba, its largest export market, Sacha is the only foreign brand stocked at the retain chain TRD Caribe's 2,179 outlets, run by the military.

The company caters to anyone with exotic skin and can be used by all women from the lightest skin shade to the darkest and all exotic shades in between. Sacha cosmetics can equally be worn by women with dark skin tones and anyone with a yellow undertone, such as Asians or Caucasians. Coming from Trinidad and Tobago, the company's colours are vibrant and can match any skin tone in a multi-ethnic society. The products can also stand up to any temperature, even cold climates. This makes it easy to sell the brand abroad. In Cuba for instance, they only want a brand that is no 1 in the home country. This is its major selling point: universality and versatility.

The company's distribution channels have been tried and tested. It comprises four main areas-1) online sales (6%), 2) export markets, going through a distributor (20%,), 3) in Trinidad and Tobago, direct manufacturer to retailer, in this case, selling to the Pennywise chain of stores and 4) Sacha retail outlets. The Pennywise model is an excellent one, since they command 91% of the cosmetics retail market locally.

The company has a three-tiered customer base: overseas customers reached through distributors, online customers and retail customers. It has been easy to maintain their customer base as the company's recently retired CEO, Kama Maharaj, is highly ethical, employs good customer relations and this trickles all the way down to employees in the company. As with Heather Jones, Sacha Cosmetics Ltd. has very dedicated workers who have been employed there for a very long time (as long as 35 years). Mr. Maharaj is very passionate about the company and the services they provide. Of the 4 employees who founded Sacha with him, 3 of them still work there.

The company uses state of the art lab and manufacturing machines. In order to remain industry-relevant, they are constantly upgrading their machinery and techniques. The new CEO is Kama Maharaj's son, who is currently upgrading the plant. The company frequently attends shows in China to keep abreast of what is cutting edge and to be able to implement new technologies where possible. Because of the size of the company and its export volumes, they are in a position to travel to Asia to see first-hand, updated technologies.

With regard to their operating processes, there are procedures for everything. They adhere to very strict procedures and standards. They do all their manufacturing in Trinidad and Tobago to keep the formulas a secret. If they were to have their products manufactured in China, there would be knock-offs, so to avoid this, manufacturing is kept in Trinidad and Tobago. The R&D is all local. Kama has a background in chemistry and his brother has a doctorate in chemistry, so they do the majority of the formulations. Prior to manufacturing locally, they started with the yellow-based foundations but now that they have discovered how to eliminate the yellow undertones and this input is primarily responsible for the company's huge success.

The majority of the company's raw materials are bought in China (99%) and the remaining 1% in the US. Previously, they were not able to source raw materials in China, because they did not meet the minimum order quantity. The quantity they currently purchase now makes it possible.

Sacha Cosmetics Ltd. has had tremendous exposure on the regional and international markets. On August 29th 2014, at the Multicentro, Panama City, they were invited to attend the prestigious Studio F show, partnering with Latin Vogue Magazine. Sacha Cosmetics was the exclusive make-up for models backstage and front stage for the guests. In addition to wanting Sacha products for use at the various shows, Sacha make-up artists are also utilized.

They were also the official makeup for Miss Universe 1999, Miss USA 2001, Miss Bahamas, Miss Jamaica, Miss St. Vincent and the Grenadines, Miss St. Lucia, Fashion Week Trinidad and Tobago, Caribbean Fashion Week and Caribbean's Next Top Model. They have been involved in all the major pageants in the Caribbean. They attended LA Fashion Week last year and subsequently opened their branch in Los

Angeles. They have partnerships with the distributors in the various countries. Guyana is also a strong market. They started there 15 years ago, distributing their products through Beauty World, using one distributor, and the number one brand in Guyana. The relationship factor is key. They have a presence in all the islands, Their cosmetics were previously sold in Walmart, which they stopped because of the business in Cuba.

Sacha Cosmetics is also very committed to assisting the community. Every day they receive 20-30 calls or emails asking for support for all kinds of fashion events. The have a policy of turning no one away, so that no matter the size of the event, they always assist.

Even as a highly successful company, they continue to face many challenges. In the scheme of the cosmetics industry they are a small player, so that the ability to change packaging for example is difficult. Revlon has the capacity to bring out new lipsticks every 8 months. This was a major competitor for them when they worked in Walmart, but they could not change packaging because of the smaller volumes they sold.

To go into many of the Latin markets is a very costly exercise, particularly for registering products. It took the company 15 years before they could successfully enter the Cuban market. For these kind of ventures there is not enough government assistance. ExporTT has assisted them with registration, even paying 50% of the cost of translations when entering markets where English is not the official language. With Sacha's international success they can assist designers to show in Milan. Yet because of the lack of cohesion in the sector other Fashion Industry professionals have not sought to utilize them despite their company's international success. The company laments the disdain for locally made products. In Trinidad and Tobago, there is a lack of acceptance by a small part of the society that sees Sacha Cosmetics as somewhat inferior because it is locally manufactured.

The former CEO sees many opportunities for the industry as a whole because there is an abundance of talent. If there is more government assistance in terms of providing funding in the right way it will make a difference but it must be monitored and managed. The potential for Sacha is endless. They can conquer the world, but more support is needed. Sacha's CEO and some of the teams travel 2 weeks in every month, and all of that is funded by Sacha. They would like additional funding to lead a fact-finding mission to allow them to break into new markets.

In terms of the synergies that exist between the cosmetics industry and fashion, make-up is required for fashion shows. It would be ideal to have faces wearing make-up Made in Trinidad and Tobago, wearing garments Made in Trinidad and Tobago, so that makeup and garments go hand in hand. Sacha Cosmetics could be used to launch local designers in new overseas markets. When their products are being used for international shows, they can have a spotlight on Trinidad and Tobago fashion, even if it is 5-10 minutes of Trinidad and Tobago design on a runway. In the last Panama show, the models were wearing silk sarongs. These sarongs could have been made by Heather Jones for instance. There would be a great deal of publicity on television and other media. The Miss Panama Pageant was an opportunity to present to the biggest buyers there, giving the company a great deal of exposure.

The third example is a graduate of the CAFD at UTT, **Noorulain Agha**, who operates under the label **Noor**. The designer has a very clear sense of who her target market is: women 30-55 years old, the age group with disposable income. While she has affordable pieces, she mainly does a luxury line, catering to working women who are established in their lives and have the money to spend on themselves. So even though the majority of her clients are from the corporate world or even diplomats, occasionally she gets someone in their 20s and even in their 70s interested in her pieces. This keen sense of clientele was also a feature of most young designers interviewed for the project. This indicated that emerging designers were acutely aware of who they were designing for, their spending habits and lifestyles, designing with purpose as they stated.

Despite being new to fashion, Noor is able to carve a niche for herself, fuelled by a level of professionalism (not usually associated with young designers) and capitalizing on an interest by a segment of the population to wear locally-made garments. In addition to clothing, she makes her own jewellery, available exclusively at the Gallery, Long Circular Mall.

She has circumvented the problem of finding reliable technical personnel, by employing a draper directly from UTT. She does all the hand detailing of her work herself, but spoke of the need to find people equipped with certain skills, for example being able to cut fabric, stitchers, etc. She therefore resorts to training the staff and has to go through the entire process of retraining if they leave. Because of people's unreliability and poor work ethic, like most designers, she is constrained to do everything herself. This includes monitoring work, doing reviews, following up on everything, especially when there is a new collection. Her production area is close to her office for that reason. Nonetheless, she is able to employ an assistant designer, unlike most of the other emerging designers, as well as someone who does marketing. Productivity is extremely important and labour issues of the nature that characterizes the Trinidad and Tobago Fashion Industry are inimical to building a viable, competitive sector.

In addition to labour, the quality and sourcing of raw materials is an additional difficulty facing designers. The textile industry is key, yet many of the fabrics are inferior or too costly when the quality is good. She therefore resorts to using Fedex to bring in materials. She uses Caribbean Shipping Agencies INVIERE, which is extremely expensive, as there is no fabric mill in Trinidad and Tobago. Even if she sent a swatch to China they could make the fabric, but their minimum quantity is 1,000 yards, which is not practical for local industry professionals, as such large quantities are not required.

Both fabric and notions are a problem. The designer encounters difficulties getting proper draping and fabric patterns or even procuring something as simple as silk pins. She is obliged to use regular pins, which are blunt and damage the fabric. Ordinary applications in a foreign country are challenges in the local context, such as matching zips and threads for unique colours, sourcing good quality zips and other trimmings. She even has to source quality jersey material from Pakistan. Even when these things are available here, the mark-up is huge. Low to medium-end suits are different, but there is no fabric for luxury lines. She therefore brings in material from New York to do her suiting.

Expanding her clientele base overseas is not an easy process. She gets requests abroad for online shipping, but because she does limited pieces she has not gone into larger production. She will look into technological applications in the future to be able to do this. However, significant capital is required to bring these business ventures to fruition.

The issue of limited funding was also of great concern for this designer, particularly support for talented graduates of the CAFD, the new designers of the country. The corporate sector has been very supportive, as the kind of work she does goes hand in hand with the kind of customers they cater to and this in turn gives them added exposure as well as for their products and services.

Finally, on the issue of cohesion, Noor felt that designers in Trinidad and Tobago are not working hand in hand; not doing things collectively to make the industry thrive, for example, trying to push trends forward. Individually, the designers would be doing it in their own way, but locally there is no trending. Fashion has to appeal right down to the masses. The Caribbean is not just about resortwear. A regular wardrobe is also required: such as jackets, pencil skirts, etc. The entire culture needs to change from the elite to the masses.

Similar to Heather Jones, she was of the view that designers should be able to sell their clothing in the local malls and that there should be special retail space for graduates to sell their stuff, e.g. West Mall. Other designers with no funding could have a space at the mall. This exists in Pakistan, or Stop Shop in Britain, where two new designers bring in their stuff and they get their things sold and even go on to work for other designers. In Trinidad we have no large department stores. We need proper factories first with skilled labour, so that the clothing sold in these spaces can be adjusted in the same country if there is something that needs fixing.

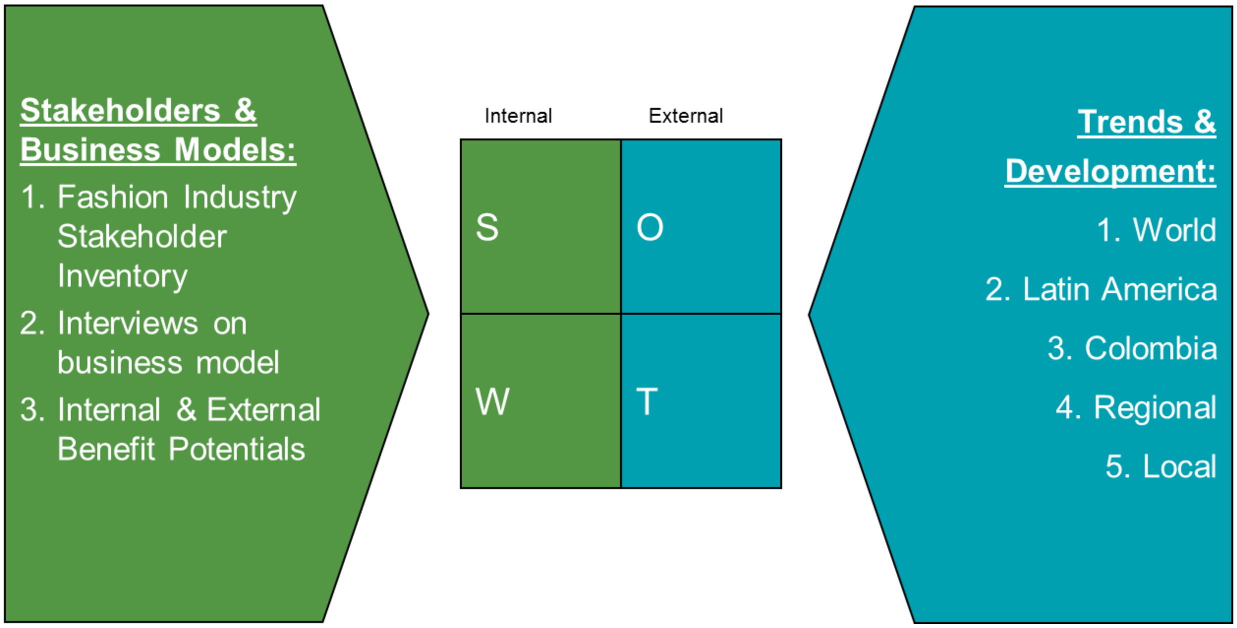
Firm Level Analysis Synopsis

The three entities in this section paint a picture of a fledgling, informal, unstructured industry in need of organization and support at the financial, institutional and policy levels. The constraints facing Fashion Industry professionals in Trinidad and Tobago are a great hindrance to the development of the sector in terms of expanding exports, foreign revenue earnings and employment generation. While, the stakeholders who were successful were extremely resilient, an enabling environment would greatly assist the development of the industry.

All of the fashion entities in this section faced similar challenges whether established or new, emerging labels. The difference in approach is that there are more options available to companies that have had phenomenal success on the international scene. While additional funding is always required, the first two companies above have more avenues and more contacts/partnerships to solve problems of a technical, technological or manufacturing nature. Being able to visit China and hand-pick factories suited to individual manufacturing needs are certainly not options available to the average company with 2-3 employees. International acceptance also goes a long way in strengthening the resolve to continue forging ahead to look for new markets and to innovate. In terms of innovation, Sacha Cosmetics Ltd. has the distinction of becoming the world's first cosmetic company to manufacture cosmetics that are halaal certified, paving the way to enter the Islamic market where products that contain alcohol and animal fat are a barrier to trade.

7.8 Appendix 4 – Detailed Industry SWOT

Figure 32: SWOT Analysis structure in this initiative



Based on the work presented thus far, the following are some important conclusions that were considered in the development of the strategy:

Strengths of the industry

- The Global Fashion Industry is dynamic and growing
- Globally, apparel and textile exports were $708.4 in 2012, with a CAGR of 5.5%
- The global apparel and fashion trade is expected to grow to USD1 trillion by 2020
- Top growth companies are from Asia with Vietnam, China, Bangladesh, Turkey and India leading the market
- Emerging markets from Asia and Latin America are increasingly playing an important role in the global Fashion Industry
- Developed countries like the US and UK have largely outsourced their production to Asian countries to reduce costs and survive a recessive economy
- There are strong demographic changes in the US and Europe. Manufacturers can capitalize on these markets
- The customer in the US is more likely to be senior by age with 20% of the American population to be above 65.
- There is also a strong growth in ethnic groups, Hispanics in particular offering fresh opportunities to manufacturers.
- There is a strong customer trend towards increased product differentiation, catering to a diverse,

aware and demanding customer base

- China is the biggest exporter of textiles growing from $8.2billion in 1990 to $95billion in 2012. India is second in this category, at $15.3 billion in 2012
- China enjoyed a 37.8% market share of global exports in 2012
- On an International basis the Asian countries have a share of 57% of the total export market
- China has been far ahead of other countries in adopting technology, and the manufacturing units have been large and state of the art.
- Customers are still largely buying at the 'Brick and Mortar' stores, though there is a strong emerging preference for e-commerce sites.
- The UK is a developed country in terms of fashion with a diverse base. The market is highly segmented and strong and has well established buying patterns
- Luxury segments are growing in the developed nations irrespective of factors such as the recession.
- The luxury segment growth is even more established in the developing and emerging markets.
- The luxury segment globally is buoyed by a burgeoning middle class in emerging markets across Latin America, Asia, the Pacific and Africa
- Retailers are facing change and successful, retailers are combining and building Brick and Mortar and e-commerce websites business models.

Weaknesses of the industry

- Customers in the developed as well as developing nations are increasingly price sensitive
- Brands facing intense competition are offering products that are discounted
- Customers are also waiting for the discounts to buy clothes
- Restricted customer spending in developing countries
- Larger businesses and brands like Gap are increasing their core competence and building their markets outside the US also
- There are issues with the supply chain; there is a huge gap between knowledge and experience. Though there is huge demand, the supply issues are bottlenecks for growth.
- Though Trinidad & Tobago companies have footholds in international markets, companies have to understand the full industry structures across the world to explore the export markets.
- In Latin America, the cost of registering Trinidad and Tobago -made products is extremely high and is a time-consuming, bureaucratic process
- Manufacturing is a challenge in terms of scale, quality, consistency, and costs
- Finding skilled labour is very difficult
- Finding employees with a good work ethic is very difficult
- Structured funding and overall support for ventures is weak
- Sourcing quality raw materials and accessories that are not exorbitant is difficult
- Consistency in meeting & filling international orders is a challenge.

Opportunities within the industry

- Reduced spending is propelling retailers to change business models along the lines of Zara in the EU and Macy's in the US to increase their offerings to the consumer
- Retail apparel chains are employing bricks and clicks together successfully. That is, they create synergies between very active websites and their retail stores
- Technology adoption is key in adapting to these changing business models, where the supply chain needs to be integrated.
- There is opportunity in the high value products, with India, Indonesia, Bangladesh, Vietnam and Cambodia exporting knits, needle work woven bottoms and tops.
- Export competition is from low-cost nations like Bangladesh, as well as Vietnam, Sri Lanka, Indonesia, Cambodia, India, Pakistan, and Latin America
- Countries like India, Turkey and Sri Lanka as well as entire regions, such as Latin America, are upgrading technology to meet customer demands.
- Countries like India and China are also demand drivers for niche exports from the US
- Opportunity is great and can be found to be increasing in significance in the emerging markets
- Many of the strongest growth areas, such as Colombia, are actively seeking partners and Trinidad & Tobago companies need to consider the opportunity of identifying partners "locally" in order to reach important regional cities with high growth
- There is also a strong demand (specifically women) for mid-market businesses in the emerging markets
- Demand for brands that are unique and stand out is increasing
- Collaboration and more networking between designers to be able to seize opportunities, including the establishment of cooperatives
- Market segments: plus size, maternity wear, children's clothing and 'modest clothing.'
- International shows and especially trade fairs for overseas exposure
- Opening up a local fashion retail space exclusive to local designers
- Taking advantage of certain highly successful brands 'Made in TnT', such as Sacha Cosmetics Ltd. to enter into non-traditional markets
- Combining all aspects of the Fashion Industry to ensure the growth of the sector locally.

Threats to the industry

- Globalization is a serious challenge for small, local companies
- Large brands and markets tend to push smaller manufacturers
- There is complex market segmentation in developed and emerging nations
- The costs of partnering and localization can be high, especially in the developed markets
- For the manufacturer there might be a strong need to identify and move towards the emerging markets
- Large volumes of imported clothing
- Competition from regional players
- Competition/rivalry and a resistance to creative collaboration

- Globalization of production systems and the use of technology
- Online shopping
- Failure to include demographic and consumer trends in design elements and target markets
- Limited access to e-commerce systems
- Failure of giving proper recognition to the arts and design-related programmes in the school system

Within the local context, the following reoccurring themes highlighted above emerged during the data gathering and consolidation process. These formed part of the analysis when assessing the SWOT in relation to the development of the Strategy for the Fashion Industry of Trinidad and Tobago.

7.9 Appendix 5 –Brief Overview of the Local Fashion Industry and Mas Design

There are cross-sector linkages between the local Fashion Industry and mas design. A recent study describes them both as "composite sectors owing to the diverse nature of the activities involved in generating related products."[44] In addition to the strong design component that is vital to the sustainability of both these areas, the carnival industry as a whole provides many creative outlets for local fashion designers. In fact, it is the opportune time for their pieces to be seen and it is a period of heightened design inspiration. This alignment has been identified in recent studies on the local Fashion Industry.[45]

While the international Fashion Industry is governed by the traditional spring, summer, winter and fall seasons, in the Caribbean the two main 'seasons' around which there is increased design are Christmas and Carnival. Outside of these two 'seasons' designers find work in relation to the wedding months of June/December, school graduations in June/July and other such annual specialty events.

Local fashion designers

- design costumes for sections of carnival bands and design accessories;
- produce garments for high-end customers attending carnival fetes and other events
- produce Monday wear.

Fashion and carnival are intimately linked from the point of view of swimwear being the basis for carnival costumes. One of the most visible recent trends is the emergence of the Mondaywear market. Monday wear or alternative bodywear for the Monday parade is a trend that been in existence for the past few years and has grown in popularity, particularly among the larger carnival bands and mega-band Tribe. The trend emerged through the desire of some females no longer wanting to wear the same costume on both days. This is the genesis of Monday wear (Interview, Rhion Romany, 25/10/14). The trend is growing outside of Trinidad and Tobago and local mas designers here are being called upon to provide the same type of services for Barbados Cropover Festival, where many Trinidadian designers outsource their designs in the neighbouring island.

There are opportunities for more collaboration between fashion and mas designers. Anya Ayoung-Chee incorporated feathers and gems merging it with silk, so that her costume was like a kaftan. The band K2K is more dramatic in their designs, as they marry carnival design with various fashion concepts. Their "unique designs" set them apart from their counterparts and their brand is built around "a contemporary, edgy fashion-forward product" (www.k2k-carnival.com), accomplished by fusing "high fashion with mas design."

The following table provides a listing of Mas / Carnival Costume Designers as at 2015. The designers marked with * are directly involved in the local Fashion Industry. This listing whist comprehensive, is not exhaustive.

[44] http://niherst.gov.tt/s-and-t/projects/foresighting/creative-sector-chpt2.pdf

[45] Excerpt from http://www.niherst.gov.tt/resources/publications/fashion-advanced-sector-foresighting-project.pdf: "Trinidad and Tobago already has a successful and innovative fashion and creative sector that provides a strong platform for 'going global' in a more proactive and ambitious way. It is a sector that is in tune with a great deal of national passion – in particular the country's Carnival scene."

CARNIVAL BAND	DESIGNER
Bliss (www.blisscarnival.com)	• Jodi Henriques (Designer) • Claude Desir (Designer) • Sian McIntosh (Designer, Bliss and Island People) • Keisha Als (Designer of Monday Wear) • Avalon (Designer of Monday Wear)
Fantasy (www.mycarnivalfantasy.com)	• *Sandra Hordatt (Creative Director) • Richard Anthony Productions and Concepts • Jamilla Jeffrey
Harts (www.hartscarnival.com)	• Gerald Hart
Island People (www.islandpeoplemas.com)	• *Sonia Mack • Renee Williams • JP Richardson (Paradise Carnival MondayWear) • *Christian Boucaud • Karlea Burkett and Jamie Romero • Anton Francis • Hamzah Mohammed • Odette Nikisha Jack • Ladelin Garcia • Patrice Regis • Michael Limchoy • Colin Greaves
K2K (www.k2k-carnival.com)	• *Karen and *Kathy Norman
Tribe (ww.carnivaltribe.com**)**	• Monique Nobrega (Design and Production Director) • Lana Nobrega (Senior Designer) • Melissa James (Senior Designer) • Solange Govia (Designer) • Valmiki Maharaj (Designer) • Anya Elias (Designer) • Ruanne Booker (Designer) • *Anya Ayoung-Chee (Designer) • Douglas John (feather work)
Ronnie and Caro (www.ronnieandcaro.com)	• Caroline McIntosh • Abena John • Carlotta John
MondayWear Designers	• *Rhion Romany (exclusively for Tribe) • *J. Angelique and Jin Forde • *Chandra Maharaj • ela Design MondayWear Company: Maria Elena Jute and Nina Alcantara • Samantha Ammon • Glam The Sexy Carnival Monday Wear • Marie Collette (Resort Wear and Carnival Monday Wear) • *Summer Jade Swimwear • KDG • Ryan Chan • Keishel Williams

7.10 Appendix 6 – Principle Strategies Portfolio – Incremental Scores

P1A. Market Access Incremental Scores

	Costs		Benefits				
Name	**TT$ Investment**		**Viability**	**Large Export Lead**	**Growth Linkage**	**Depth & strength**	**Prob of Success**
SQ - occasional	70		0	0	0	0	1
S1. E-payments	50		30	10	10	20	40
S2. Sales shows	400		50	50	40	50	70
S3. Sourcing	400		90	100	10	30	90
S4. Carib. Brand	800		100	60	100	100	80

P1B. Org & Ops Incremental Scores

	Costs		Benefits				
Name	**TT$ Investment**		**Viability**	**Large Export Lead**	**Growth Linkage**	**Depth & strength**	**Prob of Success**
SQ - no intervention	0		0	0	0	0	1
S1. FVCIP-non GVC	400		80	40	50	50	50
S2. Cooperative	600		30	40	100	100	50
S3. FVCIP-GVC	600		100	100	40	40	80

P2. Coord. & Support Incremental Scores

	Costs		Benefits				
Name	**TT$ Investment**		**Viability**	**Large Export Lead**	**Growth Linkage**	**Depth & strength**	**Prob of Success**
SQ - no coordination	0		0	0	0	0	1
S1. Related coord	100		50	100	90	30	50
S2. Coordinate	150		100	20	100	80	100
S3. Association	400		70	20	90	100	50

P3. Good governance Incremental Scores

	Costs		Benefits

Name	TT$ Investment		Viability	Large Export Lead	Growth Linkage	Depth & strength	Prob of Success
SQ - no investment	0		0	0	0	0	1
S1. Good Govern.	200		100	100	100	100	80

P4. Intel & Innovtn Incremental Scores

	Costs		Benefits				
Name	TT$ Investment		Viability	Large Export Lead	Growth Linkage	Depth & strength	Prob of Success
SQ - no intel	0		0	0	0	0	1
S1. Research	20		80	60	60	60	40
S2. Data gatherin	50		70	80	80	100	50
S3. Commercialize	50		30	50	20	20	50
S4. Research studies	200		100	100	100	80	100

P5. Ind. Policies Incremental Scores

	Costs		Benefits				
Name	TT$ Investment		Viability	Large Export Lead	Growth Linkage	Depth & strength	Prob of Success
SQ - no industry pol	0		0	0	0	0	1
S1. Industry Pol.	30		50	80	80	60	50
S2. M&E	50		80	80	80	60	50
S3. S1+ Consultn	150		100	100	100	100	100

Proposed Portfolio Package

Programme	Principal Strategy	No.	Inc. Costs		Inc. Benefits				
			TT$ Investment		Viability	Large Export Lead	Growth Linkage	Depth & strength	Prob of Success
P1A. Market Access	SQ - occasional	(1 of 5)	70		0	0	0	0	0
	S1. E-payments	(2 of 5)	50		2	2	3	1	18
	S2. Sales shows	(3 of 5)	400		3	10	10	3	7
	S3. Sourcing	(4 of 5)	400		5	21	3	2	2
P1B. Org & Ops	SQ - no intervention	(1 of 4)	0		0	0	0	0	0
	S1. FVCIP-non GVC	(2 of 4)	400		5	10	10	7	14
	S2. Cooperative	(3 of 4)	600		2	10	19	14	14
	S3. FVCIP-GVC	(4 of 4)	600		6	26	8	5	4
P2. Coord. & Support	SQ - no coordination	(1 of 4)	0		0	0	0	0	0
	S1. Related coord	(2 of 4)	100		8	10	15	2	16
	S2. Coordinate	(3 of 4)	150		17	2	16	6	0
	S3. Association	(4 of 4)	400		12	2	15	8	16
P3. Good governance	SQ - no investment	(1 of 2)	0		0	0	0	0	0
	S1. Good Govern.	(2 of 2)	200		37	46	46	32	32

Programme	Principal Strategy	No.	Inc. Costs		Inc. Benefits				
			TT$ Investment		Viability	Large Export Lead	Growth Linkage	Depth & strength	Prob of Success
P4. Intel & Innovtn	SQ - no intel	(1 of 5)	0		0	0	0	0	0
	S1. Research	(2 of 5)	20		11	6	11	8	13
	S2. Data gatherin	(3 of 5)	50		9	8	14	13	10
	S3. Commercialize	(4 of 5)	50		4	5	4	3	10
	S4. Research studies	(5 of 5)	200		13	10	18	10	0
P5. Ind. Policies	SQ - no industry pol	(1 of 4)	0		0	0	0	0	0
	S1. Industry Pol.	(2 of 4)	30		10	16	10	4	16
	S2. M&E	(3 of 4)	50		16	16	10	4	16
	S3. S1+ Consultn	(4 of 4)	150		20	20	12	7	0
		Total:	3920.00		945.09				

7.11 Appendix 7 - Sample Exporting and Contact Information for Colombia

All ordinary import procedure performed by a natural or legal person, whose FOB invoice of the merchandize exceeds USD$ 1,000, must be processed by a Customs Brokerage Company (SIA-Sociedad de Intermediación Aduanera).[46]

1. The Ordinary Import procedure is regulated in Chapter V of the Title V of Decree 2685 of 1999, once the goods have arrived in the country and are in a bonded warehouse, where the merchandize can remain for up to two months for the nationalization process.
2. The declarant is obliged to declare the goods, presenting the import declaration through Customs information system determined by the National Tax and Customs. Once the declaration is accepted, you must pay customs duties (tariff plus VAT) in the Bank.
3. After payment is made, it will proceed immediately to one of the following situations: a) To authorize the automatic release of the goods; b) documentary inspection or, c) the physical inspection.

Physical inspection must have the documents laid down in Article 121 of Decree 2685 of 1999, which are:

a) Import Registration or license that covers the goods, when requested.
b) Commercial invoice.
c) Transport document.
d) Certificate of origin, when requested.
e) Health certificate and all documentation required by the special regulations, when requested.
f) Packing List, when requested.
g) Mandate, when there is no custom endorsement and the import declaration is submitted through a Customs Brokerage Company or agent.
h) 'Declaración Andina de Valor' (a document that complements the import declaration document. Technical information related to the conditions and circumstances of the trade operation of the importation of the merchandize is included in this document) and all supporting documentation should be attached when requested.

Furthermore, The Resolution 02406 of March 24th, 2004 which amended the first paragraph of Article 39 of Resolution 4240 of 2004 sets the following: "Article 39. Prohibitions and restrictions of the entry of goods. In accordance to the provisions of the paragraph of article 41 of Decree 2685 of 1999, the imports of textiles supplies and its manufacture, classified in Section XI (Chapter 50 to 63) of the Customs Tariff, can only be processed through the ports, airports and places of arrival (all of public service status), located in the jurisdiction of the following customs administrations: Barranquilla, Bucaramanga, Buenaventura, Cali, Cartagena, Cúcuta, Ipiales, Leticia, Medellín, San Andres, Santa Marta and Bogota.

[46] Information extracted from DIAN (Taxes and Customs National Bureau) regulation and import procedure book. More information about the Bureau available at: http://www.dian.gov.co

Colombia logistics and physical distribution.

Recent efforts have been made toward the improvement of the infrastructure, transportation and logistics of Colombia. Progress in the implementation and procurement of the ‘Ruta del Sol’ which is an important road corridor communicating the cities located in the center of the country with the cities of the ports; progress has also been made in the management contract for ‘Autopista de la Montaña’ or ‘Autopistas de la Prosperidad’ which is vital in order to connect the cities of the country; ‘Autopista de las Americas’ is another critical point where much progress has also been made, it will connect Colombia with Panamá and Venezuela; and the development of a new port expansion plan with the objective of increasing the competitiveness of the national port system.

In logistics, the implementation of the National Logistic Policy and The Master Plan for Transportation 2010-2032 includes priority infrastructure projects, financing, strategies to attract private capital, high-end quality services, regulatory policies, institutional framework and conditions for diffusion of good logistics practices. This has been addressed with the aim to provide a better service and improve the competitiveness of the country.

Colombia has an excellent environment for foreign investment, with legal stability and qualified local entrepreneurs willing to get involved in the developments of the country. Major changes and improvements are occurring to promote the consolidation of a sector that leads the competitiveness of the country.

Colombian main airports and ports:

- **Cartagena:** International Airport Jose Maria Cordova / Sociedad Portuaria Regional de Cartagena (Caribbean Port)
- **Barranquilla:** International Airport Ernesto Cortissoz / Sociedad Portuaria Regional de Barranquilla (Caribbean Port)
- **Santa Marta:** Airport Simon Bolivar / Sociedad Portuaria de Santa Marata (Caribbean Port)
- **Buenaventura:** Sociedad Portuaria Regional de Buenaventura (Pacific Coastal Port)
- **Medellín:** International Airport Jose Maria Cordova
- **Bogotá:** International Airport el Dorado

Colombia transportation of goods from Trinidad and Tobago to Colombia.

Figure 33: Maritime access routes from Trinidad and Tobago to Colombia

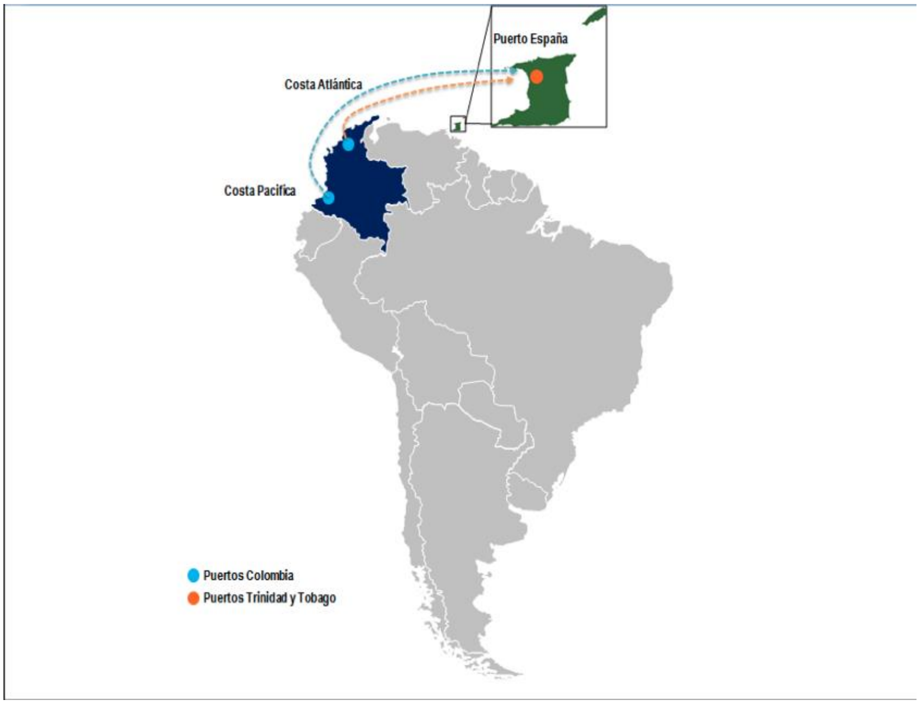


Photo source: PROEXPORT

The maritime cargo transport service offer from the Colombian Atlantic coast to Trinidad and Tobago is provided by four direct shipping lines with regular routes with transit times of four days. The offer is complemented by eight shipping services provided in connection with routes with ports of Panama, Dominican Republic and Jamaica. Transit times are 8 days.

Table 10: Frequencies and transit time from Colombian ports

Origin	Destination	Transit time (Days) Direct	Transit Time (Days) Connection	Frequency
Cartagena	Port of Spain	4	8	Weekly
Cartagena	Point Lisas	7	13	Weekly
Barranquilla	Port of Spain	7	8	Weekly
Barranquilla	Point Lisas	7	13	Weekly
Buenaventura	Port of Spain	N.A	14	Weekly
Buenaventura	Point Lisas	N.A	20	Weekly

Figure 34: Air access routes from Trinidad and Tobago to Colombia

Photo source: PROEXPORT

The supply of freight by air is provided by more than one passenger airline with available space for cargo. Connection cities: United States and Panama.

The offer is complemented by three airlines that make connection in Venezuela, the United Kingdom and the United States and has transit time of 44 hours 25 minutes to TT. The average transit time for Trinidad and Tobago is found from 8 hours 20 minutes.

Table 11: Connections airlines that provide services to Trinidad and Tobago

Airline	Connections	Frequency	Type
American Airlines	Miami (USA)	Monday to Sunday	Passengers
Aerolog	Miami (USA)	Monday to Saturday (Not on Sundays)	Cargo
Copa Airlines	Panama (Panama)	Monday to Sunday	Passengers
TA	Caracas (Venezuela)	Monday to Saturday (Not on Sundays)	Cargo
British Airway	London (UK)	Monday to Sunday	Cargo
Amerijet	Miami (USA)	Monday to Saturday (Not on Sundays)	Passengers

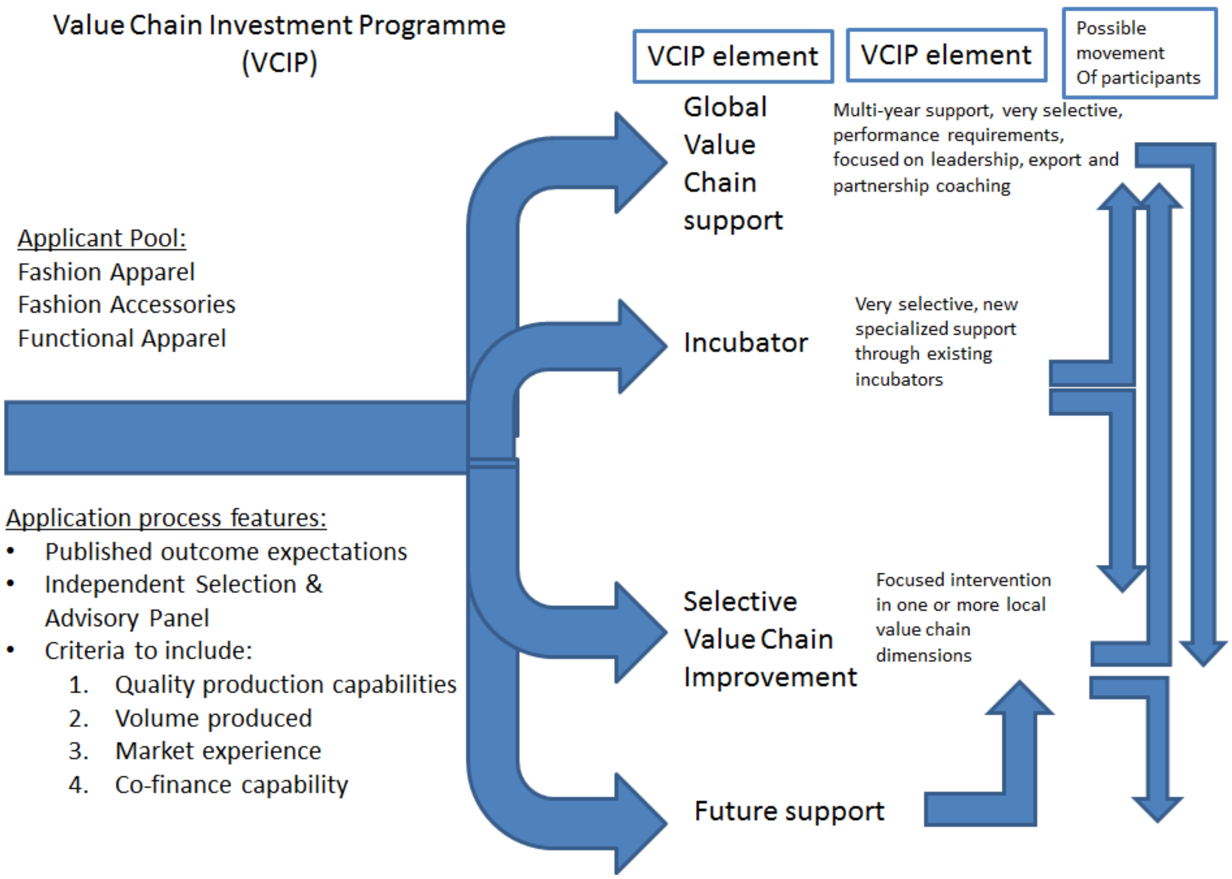
Entities that can be approached for mutual collaboration regarding Research and Development for the Fashion Industry

These entities are always open for collaborations with international players with the aim to boost trade, know-how transfer and sharing experiences.

Table 12: Direct contacts for collaboration in Fashion Sector in Colombia

Clúster Textil y Confección (Textile and Clothing Cluster)	**Director: Luz Eugenia Botero Botero**	**Email: luz.botero@camaramedellin.com.co**
La Cámara Sectorial de la ANDI (Cotton, Fibres, Textiles, Apparel)	Director: Juliana Calad Castaño	Email: jcalad@andi.com.co
Inexmoda (Institute for export and fashion)	Director: Clara Inés Henríquez Velásquez	Email: clara.henriquez@inexmoda.org.co
Technical Forum for Textiles (Research and Development)	Maryory Correa Areiza	maryory.correa@inexmoda.org.co
PTP (Productive Transformation Program)	Director: Maria Juliana Ospina (Manager of the Textiles, Clothing, Design and Fashion division)	Email: mospina@mincomercio.gov.c0
SENA (The National Apprenticeship Service)	Director: Arturo Fernando Rojas Rojas	Tel: (57 1) 5461500

7.12 Appendix 8– Fashion Value Chain Investment Programme Overview



7.13 Appendix 9 – Select Country Exporting Standards

In the apparel industry, there are basic standards that apply to garments especially during export. It is important that manufacturers ensure that each item to be exported is properly labelled with at the very least; fabric content, and country of origin. Countries may have varying requirements regarding the specifications for apparel imports, therefore care must be taken that exporters adhere to the regulations, standards and specification requirements of the destination country prior to the shipping of merchandise.

COUNTRY	AUTHORITATIVE BODY	BRAND NAME	POINT OF ORIGIN	FABRIC CONTENT	LANGUAGE REQUIREMENTS	CARE INSTRUCTIONS	SIZING	OTHER
CARIBBEAN & SOUTH AMERICA								
Antigua and Barbuda	Antigua & Barbuda Bureau of Standards: Old Parham Road P.O. Box 1550 St. John's, Antigua TEL: (268) 562-4011 (OVERSEAS) 462 2424 (LOCAL) FAX: (268) 562-0094 EMAIL: abbs@antigua.gov.ag http://www.abbs.gov.ag/	√	√	√	English			Importing and wearing of camouflage clothing is prohibited. According to its website, the Antigua and Barbuda Bureau of Standards have no declared standards for apparel and textiles, so the basic standards were applied.
Aruba (The Netherlands)	Central Bureau of Statistics: L.G. Smith Blvd. 160, 3Rd. Floor, Sun Plaza Building, Aruba Oranjestad Aruba TEL: +297 58 374 33 FAX: +297 58 380 57 EMAIL: cbs@setarnet.aw http://www.cbs.aw		*(Optional)*	(√)	(Dutch)	*(Optional)*	*(Optional)*	No information found for Aruba, therefore standards assessed from The Netherlands profile.
Barbados	Barbados National Standards Institute: Culloden Road, St. Michael, Barbados TEL: 1 (246) 426-3870 FAX: 1 (246) 436-1495 www.bnsi.bb							
Belize	Belize Bureau of Standards Ministry of Trade, Investment, Promotion, Private Sector Development and Consumer Protection: Third Floor,	√	√	√	English			Depending on the item, other requirements may include: product name, description, manufacturer's name and address, net weight/volume, quantity, list of

	Diamonds Building Constitution Drive P.O. Box 430 Belmopan, Belize C.A. TEL: 1 (501) 822-0446 FAX: 1 (501) 822-2571 EMAIL: bbs@btl.net www.bbs.gov.bz							
Dominica	Dominica Bureau of Standards: P.O. Box 1015 9 Great Marlborough Street Roseau, Dominica TEL: 1 (767) 448-1685 FaAX: 1 (767) 449-9217 EMAIL: info@dominicastandards.org www.dominicastandards.org	√	√	√	English (*official language)*	√		Because of the difficulty in accessing the actual information, the basic requirements were included for Dominica
Guyana	Guyana National Bureau of Standards: Flat 15 Exhibition Complex Sophia Georgetown, Guyana TEL: 011 (592) 219-0062 FAX: 011 (592) 219-0070 EMAIL: gnbs@networksgy.org www.gnbsgy.org	√	√	√	*English implied*	√	√	Manufacturer's info required
Jamaica	Bureau of Standards Jamaica: 6 Winchester Road, P.O. Box 113 Kingston 10 TEL: 876 632 4275 TEL: 876 618 1534 FAX: 876 929 4736 EMAIL: info@bsj.org.jm http://www.bsj.org.jm/Home/tabid/36/Default.aspx	√	√	√	English			Cotton products may require prior authorization and/or an import license; manufacturer'= and imorter's info.

Paraguay	(The National System of Information and Notifications, Ministry of Industry and Trade) <u>Sistema Nacional de Informacion y Notificacion - SNIN</u> Ministerio de Industria y Comercio: Av. Mcal. López 3333 c/ Dr. Weiss, Villa Morra, Asunción-Paraguay TEL: +595-21 616-3288 TEL: +595-21 616-3284	√	√	√	Spanish - must be in the language of the country of consumption, but may also be in other languages.	√	√	Manufacturer and importer's info – tax identification number
Trinidad and Tobago	Trinidad and Tobago Bureau of Standards: 1-2 Century Drive Trincity Industrial Estate Macoya , Tunapuna Trinidad and Tobago TEL: (868) 662-8827 FAX: (868) 663-4335 EMAIL: ttbs@ttbs.org.tt http://gottbs.com/?page_id=597	√	√	√	English	√	√	TEXTILE PRODUCTS & FOOTWER UNIT: Seconds and lirregulars must be labeled accordingly; Any finishes applicable to the end use of the textile MUST be included if known; Either registered brand name or manufacturer's name and address on label There are additional requirements for fabrics/textiles.
EUROPE								
Finland	Inspecta Corporation – SFS Box 94 FI-02151 Espoo, Finland TEL: +358 10 521 6720 EMAIL: leena.kayhko@inspecta.fi http://www.sfs-sertifiointi.fi/	*Marks of Origin*	√	√	Finnish and Swedish	√		Name of manufacturer and importer Finnish Consumer Agency: Helsinki Tel: +358 10 19 4700 Email: posti@kuluttajavirasto.fi
France	Comité Français de l'Etiquetage Pour l'Entretien des Textiles – COFREET 37 rue de Neuilly 92 110 CLICHY Paris, France TEL: 01 47 56 31 80 EMAIL: info@cofreet.com http://cofreet.com/	√	Only where required to prevent misleading with regards to origin	√	French	*Optional* Care symbols may be used only with the agreement of the French Committee for Fabric Care Labels	*Optional*	Direction Générale de la Concurrence, de la Consommation et de la Répression des Fraudes Directorate General for Competition, Consumer Affairs and Anti-fraud Paris, France tel: +33 1 44 97 23 81
Germany	GINETEX GERMANY c/o GermanFashion An Lyskirchen 14 50676 Köln TEL: +49 221 77 44 130 FAX: +49 221 77 44 66 85		*Optional*	√	German			<u>Bundesministerium für Wirtschaft und Arbeit - BMWA (Federal Ministry of Economics and Labor)</u> Scharnhorststr. 34-37 Berlin, Germany tel: +49 1888615 0 email: info@bmwa.bund.de

	EMAIL: ginetex@germanfashion.net http://ginetex.de/kontaktieren-sie-uns/						
Ireland	Competition and Consumer Protection Commission PO Box 12585 Dublin 1 Ireland TEL: (01) 402 5500 TEL: +353 1 402 5500 LOCAL: 1890 432 432 FAX: (01) 402 5501 http://www.consumerhelp.ie/		*Optional*	√	Irish or English	*Optional*	"Requirements for specific products should be obtained from Irish importer." NSAI (National Standards Authority of Ireland) 1 Swift Square Northwood Santry Dublin 9, Ireland TEL: +353 (0)1 807 3800 FAX:+353 (0)1 807 3838 EMAIL: nsai@nsai.ie http://www.nsai.ie
Luxembourg	Ministère de l'Economie et du Commerce Extérieur Ministry of Economic Affairs and International Trade Luxembourg, Luxembourg TEL: +352 2478 2478 EMAIL: info@eco.public.lu http://www.eco.public.lu/			√	French or German		
Spain	GINETEX SPAIN Barcelona TEL: +34 93 317 62 00 EMAIL: info@gic-bcn.com Mrs. Marta Castells Sant Quirze, 30 ES - 08201 Sabadell – Barcelona, Spain PHONE: +34 93 745 19 17 FAX: +34 93 748 02 52 EMAIL: secretaria@consejointertextil.com http://www.consejointertextil.com	√	√		Spanish		Labels should include name, address of manufacturer, importer or trader, importer's taxpayer identification number. The metric system is used exclusively. Unable to access website.
Sweden	The Swedish Consumer Agency/KO Street address: Tage Erlandergatan 8A, Karlstad Box 48, 651 02 Karlstad TEL: +46 (0)771 - 42 33 00 FAX: +46 (0)54 - 19 41 95 EMAIL: konsumentverket(a)konsumentverket.se http://www.konsumentverket.se/Other-languages/ Swedish Standards Institute:		*No general requirement for labeling country of origin*	√	Swedish	√	If not already labeled before arrival, goods must be properly labeled under customs supervision within 30 days after arrival. Goods not properly labeled may be re-exported under customs supervision by the owner within the 30 day period after arrival. If neither properly labeled nor re-exported, the goods become the property of the state.

	118 80 Stockholm TEL: +46 8 555 520 00 FAX: +46 8 555 520 01 EMAIL info@sis.se http://www.sis.se/en/search/?q=Textiles%20-%20Fabrics%20for%20apparel%20-%20Detailed%20procedure						
Switzerland	Swiss Association For Textile Marking SARTEX: GINETEX SWITZERLAND Beethovenstrasse 20 P.O. Box 2900 CH-8022 Zürich info@ginetex.ch http://www.sartex.ch/en/	√ *“not prescribed by law”*	*voluntary* √		*voluntary* √ with pictographs; full series of symbols must be included on the labels without any exceptions; Washing-Bleaching-Tumble drying-Ironing-Professional textile care; Care label app available for download	√	The application of care labels on textiles and apparel products is voluntary, however, if care labels are applied they are to incorporate pictograms, which are trademarked by the International Association for Textile Care Labelling (Groupement International d'Etiquetage pour l'Entretien des Textiles - GINETEX).
United Kingdom	Department for Business, Innovation and Skills - BIS London, United Kingdom TEL: + 44 (0)20 7215 0995 EMAIL: anne.s.turner@bis.gsi.gov.uk For care labeling information, contact: Home Laundering Consultative Council - HLCC London, United Kingdom TEL: +44 207 636 77 88 EMAI: labelling@5portlandplace.org.uk http://www.care-labelling.co.uk/ginetex.html	√	√	English	√	√	Babies’ garments and adults nightwear must carry a permanent label showing whether or not they meet the flammability standard. UK Representative for GINETEX: UKFT 3 Queen Square, Bloomsbury London WC1N 3AR United Kingdom TEL+44 (0) 20 7843 9460 FAX: +44 (0) 20 7843 9478 EMAIL: info@ukft.org

								http://www.care-labelling.co.uk/ginetex.html
Bermuda	Consumer Affairs D. Rego Building, 3rd Floor 75 Reid Street Hamilton HM 12 Bermuda TEL: 441 297 7627 FAX: 441-295-6892 EMAIL: consumers@gov.bm http://www.ca.gov.bm/about/contact.asp			√	English	√	√	"Bermuda follows the same labeling and marking requirements as the U.K." (OTEXA)
NORTH AMERICA								
Canada	Canada Border Services Agency TEL: 613-996-3711 1-800-267-8376 FAX: 613-995-5137 http://www.international.gc.ca/international/index.aspx?lang=eng	*Optional* √	√	*In percentage by mass* √	NAFTA – English, French or Spanish Non-NAFTA – English or French	*Optional*	*Optional*	There may be varying regulations for NAFTA and non-NAFTA countries; Dealer identity and/or CA Number Canadian tax id number; Different provinces may also have differing requirements.
United States	Office of Textiles and Apparel (OTEXA) U.S. Department of Commerce Washington, DC 20230 TEL: (202) 482-5078 | FAX: (202) 482-2331 EMAIL: OTEXA@trade.gov www.otexa.ita.doc.gov/	√	√	√	English	√	*Optional*	

7.14 Appendix 10– Fashion Industry HS Tariff Codes

61 ARTICLES OF APPAREL & CLOTHING ACCESSORIES-KNITTED OR CROCHETED

6101 men's or boys' overcoats etc., knit or crochet

610110 Men's or Boys' Overcoats, Car-coats, of Wool, Knitted or Crocheted
610120 Men's Boys' Overcoats, Car-coats, of Cotton, Knitted or Crocheted
610130 Men's or Boys' Overcoats, of Man-made Fibres, Knitted or Crocheted
610190 Men's or Boys' Overcoats, of Other Textile Materials, Knitted or Crocheted

6102 women's or girls' overcoats etc, knit or crochet

610210 Women's or Girls' Overcoats, Car-coats, of Wool, Knitted or Crocheted
610220 Women's or Girls' Overcoats, Car-coats, of Cotton, Knitted or Crocheted
610230 Women's or Girls' Over Coats, of Man-made Fibres, Knitted or Crocheted
610290 Women's Overcoats of Other Textile Materials, Knitted or Crocheted

6103 men's or boys' suits, ensembles etc, knit or crochet

610311 Men's or Boys' Suits of Wool or Fine Animal Hair, Knitted or Crocheted
610312 Men's or Boys' Suits of Synthetic Fibres, Knitted or Crocheted
610319 Men's or Boys' Suits of Other Textile Materials, Knitted or Crocheted
610321 Men's Boys' Ensembles of Wool, Knitted or Crocheted
610322 Men's or Boys' Ensembles of Cotton, Knitted or Crocheted
610323 Men's or Boys' Ensembles of Cotton, Knitted or Crocheted
610329 Men's or Boys' Ensembles of Other Textile Materials, Knitted or Crocheted
610331 Men's or Boys' Jackets, Blazers, of Wool, Knitted or Crocheted
610332 Men's or Boys' Jackets, Blazers, of Cotton, Knitted or Crocheted
610333 Men's or Boys' Jackets, Blazers, of Synthetic Fibres, Knitted or Crocheted
610339 Men's or Boys' Jackets, Blazers, of Other Textile Materials
610341 Men's or Boys' Trousers, Breeches, Overalls, of Wool, Knitted or Crocheted
610342 Men's or Boys' Trousers, Overalls, Breeches, of Cotton, Knitted or Crocheted
610343 Men's or Boys' Trousers, Overalls, Breeches, of Synthetic Fibres
610349 Men's Trousers, Breeches, of Other Textile Materials, Knitted or Crocheted

6104 women's or girls' suits, ensemble etc, knit or crochet

610411 Women's or Girls' Suits of Wool or Fine Animal Hair,Knitted or Crocheted
610412 Women's or Girls' Suits of Cotton, Knitted or Crocheted
610413 Women's or Girls' Suits of Synthetic Fibres, Knitted or Crocheted
610419 Women's or Girls' Suits of Other Textile Materials, Knitted or Crocheted
610421 Women's or Girls' Ensembles of Wool, Knitted or Crocheted
610422 Women's or Girls' Ensembles of Cotton, Knitted or Crocheted
610423 Women's or Girls' Ensembles of Synthetic Fibres, Knitted or Crocheted
610429 Women's Ensembles of Other Textile Materials, Knitted or Crocheted
610431 Women's or Girls' Jackets of Wool, Knitted or Crocheted
610432 Women's or Girls' Jackets of Cotton, Knitted or Crocheted
610433 Women's or Girls' Jackets of Synthetic Fibres, Knitted or Crocheted
610439 Women's Jackets of Other Textile Materials, Knitted or Crocheted
610441 Women's or Girls' Dresses of Wool, Knitted or Crocheted
610442 Women's or Girls' Dresses of Cotton, Knitted or Crocheted
610443 Women's or Girls' Dresses of Synthetic Fibres, Knitted or Crocheted
610444 Women's or Girls' Dresses of Artificial Fibres, Knitted or Crocheted
610449 Women's Dresses of Other Textile Materials, Knitted or Crocheted
610451 Women's or Girls, Skirts, Divided Skirts, or Wool, Knitted or Crocheted
610452 Women's or Girls' Skirts, Divided Skirts, of Cotton, Knitted or Crocheted
610453 Women's Skirts, Divided Skirts, of Synthetic Fibres, Knitted or Crocheted
610459 Women's or Girls' Skirts, Divided Skirts, of Other Textile Materials
610461 Women's or Girls' Trousers, Breeches, of Wool, Knitted or Crocheted
610462 Women's or Girls' Trousers, Breeches, of Cotton, Knitted or Crocheted
610463 Women's Trousers, Breeches, of Synthetic Fibres, Knitted or Crocheted
610469 Women's or Girls' Trousers, Breeches of Other Textile Materials

6105 men's or boys' shirts, knitted or crocheted

610510 Men's or Boys' Shirts of Cotton, Knitted or Crocheted
610520 Men's or Boys' Shirts of Man-made Fibres, Knitted or Crocheted
610590 Men's or Boys' Shirts of Other Textile Materials, Knitted or Crocheted

6106 women's or girls' blouses & shirts, knit or croch

610610 Women's or Girls' Blouses, Shirts, of Cotton, Knitted or Crocheted
610620 Women's Blouses, Shirts, of Man-made Fibres, Knitted or Crocheted
610690 Women's or Girls, Blouses, Shirts, of Other Textile Materials

6107 men's or boys' underpants, pjs, etc, knit or croch

610711 Men's or Boys' Underpants, Briefs, of Cotton, Knitted or Crocheted
610712 Men's Underpants, Briefs, of Man-made Fibres, Knitted or Crocheted
610719 Men's Underpants, Briefs, of Other Textile Materials, Knitted or Crocheted
610721 Men's or Boys' Nightshirts, Pyjamas, of Cotton, Knitted or Crocheted
610722 Men's Nightshirts, Pyjamas, of Man-made Fibres, Knitted or Crocheted
610729 Men's or Boys' Nightshirts, Pyjamas, of Other Textile Materials
610791 Men's or Boys' Bathrobes, Dressing Gowns, of Cotton, Knitted or Crocheted
610792 Men's Bathrobes, Dressing Gowns, of Man-made Fibres, Knitted or Crocheted
610799 Mens's or Boys' Bathrobes, Dressing Gowns, of Other Textile Materials

6108 women's or girls' slips, pjs, etc, knit or crochet

610811 Women's Slips, Petticoats, of Man-made Fibres, Knitted or Crocheted
610819 Women's or Girls' Slips, Petticoats, of Other Textile Materials
610821 Women's or Girls' Briefs, Panties, Knitted or Crocheted
610822 Women's Briefs, Panties, of Man-made Fibres, Knitted or Crocheted
610829 Women's Briefs, Panties, of Other Textile Materials,Knitted or Crocheted
610831 Women's or Girls' Nightdresses, Pyjamas, of Cotton, Knitted or Crocheted
610832 Women's Nightdresses, Pyjamas, of Man-made Fibres, Knitted or Crocheted
610839 Women's or Girls' Nightdresses, Pyjamas, of Other Textile Materials
610891 Women's or Girls' Negligees, Bathrobes, of Cotton, Knitted or Crocheted
610892 Women's Negligees, Bathrobes, of Manmade Fibres, Knitted or Crocheted610899 Women's or Girls' Negligees, Bathrobes, of Other Textile Materials

6109 t-shirts, singlets, tank tops etc, knit or crochet

610910 T-shirts, Singlets, Other Vests, Knitted or Crocheted, of Cotton
610990 T-shirts, Singlets, and Other Vests, of Other Textile Materials

6110 sweaters, pullovers, vests etc, knit or crocheted

611010 Sweaters, Pullovers, Sweatshirts, Waistcoats (Vests),Knitted or Crocheted, of Wool
611020 Sweaters, Pullovers, Sweatshirts, Waistcoats (Vests), Knitted or Crocheted, of Cotton
611030 Sweaters, Pullovers, Sweatshirts, Waistcoats (Vests), Knitted or Crocheted, of Manmade Fibers

611090 Sweaters, Pullovers, Sweatshirts, Waistcoats (Vests), Knitted or Crocheted, of Other Textile

[6111](#) babies' garments & accessories, knit or crocheted

611110 Babies' Garments and Accessories, of Wool, Knitted or Crocheted
611120 Babies' Garments and Accessories, of Cotton, Knitted or Crocheted
611130 Babies' Garments and Accessories, of Synthetic Fibres
611190 Babies' Garments and Accessories, of Other Textile Materials

[6112](#) track suits, ski-suits & swimwear, knit or crochet

611211 Track Suits of Cotton, Knitted or Crocheted
611212 Track Suits of Cotton, Knitted or Crocheted
611219 Track Suits of Other Textile Materials, Knitted or Crocheted
611220 Ski Suits, Knitted or Crocheted
611231 Men's or Boys' Swimwear, of Synthetic Fibres, Knitted or Crocheted
611239 Men's or Boys' Swimwear, of Other Textile Materials, Knitted or Crocheted
611241 Women's or Girls' Swimwear, of Synthetic Fibres, Knitted or Crocheted
611249 Women's Swimwear, of Other Textile Materials, Knitted or Crocheted

[6113](#) garments, knit etc, coated etc rubber, plastic etc

611300 Garments, Knitted or Crocheted

[6114](#) garments nesoi, knitted or crocheted

611410 Other Garments of Wool or Fine Animal Hair, Knitted or Crocheted
611420 Other Garments of Cotton, Knitted or Crocheted
611430 Other Garments of Man-made Fibres, Knitted or Crocheted
611490 Other Garments of Other Textile Materials, Knitted or Crocheted

[6115](#) pantyhose, socks & other hosiery, knit or crochet

611511 Panty Hose, Tights, of Synthetic Fibres, Single Yarn Less than 67 Decitex
611512 Panty Hose, Tights, of Synthetic Fibres, Single Yarn 67 Decitex or More
611519 Panty Hose, Tights, of Other Textile Materials, Knitted or Crocheted

611520 Women's Full-length or Knee-length Hosiery, Knitted or Crocheted
611591 Stockings, Socks, of Wool or Fine Animal Hair, Knitted or Crocheted
611592 Stockings, Socks, of Cotton, Knitted or Crocheted
611593 Stockings, Socks, of Synthetic Fibres, Knitted or Crocheted
611599 Stockings, Socks, of Other Textile Materials, Knitted or Crocheted

6116 gloves, mittens and mitts, knitted or crocheted

611610 Gloves Impregnated, Coated or Covered With Plastics or Rubber
611691 Gloves, Mittens, Mitts, of Wool or Fine Animal Hair, Knitted or Crocheted
611692 Gloves, Mittens, Mitts, of Cotton, Knitted or Crocheted
611693 Gloves, Mittens, Mitts, of Synthetic Fibres, Knitted or Crocheted
611699 Gloves, Mittens, Mitts, of Other Textile Materials, Knitted or Crocheted

6117 made-up clothing access nesoi. parts etc. knit etc

611710 Shawls, Scarves, Mufflers, Mantillas, Veils, Knitted or Crocheted
611720 Ties, Bow Ties, Cravats, Knitted or Crocheted
611780 Other Made up Clothing Accessories, Knitted or Crocheted
611790 Knitted or Crocheted Parts of Garments or of Clothing Accessories

62 ARTICLES OF APPAREL & CLOTHING ACCESSORIES-NOT KNITTED OR CROCHETED

6201 men's or boys' overcoats, cloaks etc, not knit etc

620111 Men's or Boys' Overcoats, Raincoats, Car-coats, Capes, of Wool
620112 Men's or Boys' Overcoats, Raincoats, Car-coats, Capes, Cloaks, of Cotton
620113 Men's or Boys' Overcoats, Raincoats, Car-coats, Capes, of Man-made Fibres
620119 Men's or Boys' Overcoats, Raincoats, Car-coats, of Other Textile Materials
620191 Men's or Boys' Anoraks, Wind-cheaters, Wind-jackets, of Wool
620192 Men's or Boys' Anoraks, Wind-cheaters, Wind-jackets, of Cotton
620193 Men's or Boys' Anoraks, Wind-cheaters, Wind-jackets, of Man-made Fibres
620199 Men's Anoraks, Wind-cheaters, Wind-jackets, of Other Textile Materials

6202 women's or girls' overcoats etc, not knit or crocheted

620211 Women's or Girls' Overcoats, Car-coats, Capes, Cloaks, of Wool
620212 Women's or Girls' Overcoats, Car-coats, Capes; Cloaks, of Cotton
620213 Women's or Girls' Overcoats, Car-coats, Capes, Cloaks of Man-made Fibres

620219 Women's Overcoats, Carcoats, Capes, Cloaks, of Other Textile Materials
620291 Women's or Girls' Anoraks, Wind-cheaters, Wind-jackets of Wool
620292 Women's or Girls' Anoraks, Wind-cheaters, Wind-jackets of Cotton
620293 Women's or Girls' Anoraks, Wind-cheaters, Wind-jackets of Man-made Fibres
620299 Women's Anoraks, Wind-cheaters, Wind-jackets of Other Textile Materials

6203 men's or boys' suits, ensembles etc, not knit etc

620311 Men's or Boys' Suits, of Wool or Fine Animal Hair
620312 Men's or Boys' Suits, of Synthetic Fibres
620319 Men's or Boys' Suits, of Other Textile Materials
620321 Men's or Boys' Ensembles, of Wool or Fine Animal Hair
620322 Men's or Boys' Ensembles, of Cotton
620323 Men's or Boys' Ensembles, of Synthetic Fibres
620329 Men's or Boys' Ensembles, of Other Textile Materials
620331 Men's or Boys' Jackets, Blazers, of Wool or Fine Animal Hair
620332 Men's or Boys' Jackets, Blazers, of Cotton
620333 Men's or Boys' Jackets, Blazers, of Synthetic Fibres
620339 Men's or Boys' Jackets, Blazers, of Other Textile Materials
620341 Men's or Boys' Trousers, Overalls, Breeches, of Wool or Fine Animal Hair
620342 Men's or Boys' Trousers, Overalls, Breeches, of Cotton
620343 Men's or Boys' Trousers, Overalls, Breeches, of Synthetic Fibres
620349 Men's or Boys' Trousers, Overalls, Breeches, of Other Textile Materials

6204 women's or girls' suits, ensemble etc, not knit etc

620411 Women's or Girls' Suits, of Wool or Fine Animal Hair
620412 Women's or Girls' Suits, of Cotton
620413 Women's or Girls' Suits, of Synthetic Fibres
620419 Women's or Girls' Suits, of Other Textile Materials
620421 Women's or Girls' Ensembles, of Wool or Fine Animal Hair
620422 Women's or Girls' Ensembles, of Cotton
620423 Women's or Girls' Ensembles, of Synthetic Fibres
620429 Women's or Girls' Ensembles, of Other Textile Materials
620431 Women's or Girls' Jackets, of Wool or Fine Animal Hair
620432 Women's or Girls' Jackets, of Cotton
620433 Women's or Girls' Jackets, of Synthetic Fibres
620439 Women's or Girls' Jackets, of Other Textile Materials
620441 Women's or Girls' Dresses, of Wool or Fine Animal Hair
620442 Women's or Girls' Dresses, of Cotton
620443 Women's or Girls' Dresses, of Synthetic Fibres

620444 Women's or Girls' Dresses, of Artificial Fibres
620449 Women's or Girls' Dresses, of Other Textile Materials
620451 Women's or Girls' Skirts, Divided Skirts, of Wool or Fine Animal Hair
620452 Women's or Girls' Skirts, Divided Skirts, of Cotton
620453 Women's or Girls' Skirts, Divided Skirts, of Synthetic Fibres
620459 Women's or Girls' Skirts, Divided Skirts, of Other Textile Materials
620461 Women's or Girls' Trousers, Breeches, of Wool or Fine Animal Hair
620462 Women's or Girls' Trousers, Breeches, of Cotton
620463 Women's or Girls' Trousers, Breeches, of Synthetic Fibres
620469 Women's or Girls' Trousers, Breeches, of Other Textile Materials

6205 men's or boys' shirts, not knitted or crocheted

620510 Men's or Boys' Shirts, of Wool or Fine Animal Hair
620520 Men's or Boys' Shirts, of Cotton
620530 Men's or Boys' Shirts, of Man-made Fibres
620590 Men's or Boys' Shirts, of Other Textile Materials

6206 women's or girls' blouses, shirts etc not knit etc.

620610 Women's or Girls' Blouses, Shirts, Shirt-blouses, of Silk or ilk Waste
620620 Women's or Girls' Blouses, Shirts, of Wool or Fine Animal Hair
620630 Women's or Girls' Blouses, Shirts, of Cotton
620640 Women's or Girls' Blouses, Shirts, of Man-made Fibres
620690 Women's or Girls' Blouses, Shirts, of Other Textile Materials

6207 men's or boys' undershirts etc, not knit or crochet

620711 Men's or Boys' Underpants, Briefs, of Cotton
620719 Men's or Boys' Underpants, Briefs, of Other Textile Materials
620721 Men's or Boys' Nightshirts, Pyjamas, of Cotton
620722 Men's or Boys' Nightshirts, Pyjamas, of Man-made Fibres
620729 Men's or Boys' Nightshirts, Pyjamas, of Other Textile Materials
620791 Men's or Boys' Singlets, Bathrobes, Dressing Gowns, of Cotton
620792 Men's or Boys' Singlets, Bathrobes, Dressing Gowns, of Man-made Fibres
620799 Men's or Boys' Singlets, Bathrobes, of Other Textile Materials

6208 women's or girls' slips etc, not knit or crochet

620811 Women's or Girls' Slips, Petticoats, of Man-made Fibres
620819 Women's or Girls' Slips, Petticoats, of Other Textile Materials
620821 Women's or Girls' Nightdresses, Pyjamas, of Cotton
620822 Women's or Girls' Nightdresses, Pyjamas, of Man-made Fibres
620829 Women's or Girls' Nightdresses, Pyjamas, of Other Textile Materials
620891 Women's or Girls' Singlets, Briefs, Panties, Negligees, Bathrobes, of Cotton
620892 Women's or Girls' Singlets, Briefs, Panties, Negligees, Man-made Fibres
620899 Women's or Girls' Singlets, Briefs, Panties, of Other Textile Materials

6209 babies' garments & accessories, not knit or crocheted

620910 Babies Garments and Clothing Accessories, of Wool or Fine Animal Hair
620920 Babies Garments and Clothing Accessories, of Cotton
620930 Babies Garments and Clothing Accessories, of Synthetic Fibres
620990 Babies Garments and Clothing Accessories, of Other Textile Materials

6210 garments, of felt etc, or fabric impregnated etc

621010 Garments, Made up of Fabrics, of Felt, Nonwovens
621020 Other Garments of Fabrics
621030 Other Garments of Fabrics
621040 Other Men's or Boys' Garments
621050 Other Women's or Girls' Garments

6211 track suits, ski-suits & swimwear, not knit etc

621111 Men's or Boys' Swimwear
621112 Women's or Girls' Swimwear
621120 Ski Suits
621131 Other Garments, Men's or Boys', of Wool or Fine Animal Hair
621132 Other Garments, Men's or Boys', of Cotton
621133 Other Garments, Men's or Boys', of Man-made Fibres
621139 Other Garments, Men's or Boys', of Other Textile Materials
621141 Other Garments, Women's or Girls', of Wool or Fine Animal Hair
621142 Other Garments, Women's or Girls', of Cotton
621143 Other Garments, Women's or Girls', of Man-made Fibres
621149 Other Garments, Women's or Girls', of Other Textile Materials

6212 bras, girdles, garters etc., knitted etc or not

621210 Brassieres
621220 Girdles and Panty-girdles
621230 Corsets
621290 Corsets, Braces, Suspenders, Garters and Similar Articles and Parts

6213 handkerchiefs

621310 Handkerchiefs of Silk or Silk Waste
621320 Handkerchiefs of Cotton
621390 Handkerchiefs of Other Textile Materials

6214 shawls, scarves, mufflers, mantillas, veils etc.

621410 Shawls, Scarves, Mufflers, Mantillas, Veils, of Silk or Silk Waste
621420 Shawls, Scarves, Mufflers, Mantillas, Veils, of Wool or Fine Animal Hair
621430 Shawls, Scarves, Mufflers, Mantillas, Veils, of Synthetic Fibres
621440 Shawls, Scarves, Mufflers, Mantillas, Veils, of Artificial Fibres
621490 Shawls, Scarves, Mufflers, Mantillas, Veils, of Other Textile Materials

6215 ties, bow ties & cravats, not knitted or crocheted

621510 Ties, Bow Ties, Cravats, of Silk or Silk Waste
621520 Ties, Bow Ties, Cravats, of Man-made Fibres
621590 Ties, Bow Ties, Cravats, of Other Textile Materials

6216 gloves, mittens and mitts, not knit or crocheted

621600 Gloves, Mittens, Mitts

6217 made-up clothing access nesoi, garment etc parts nesoi

621710 Other Madeup Clothing Accessories
621790 Parts of Garments or of Clothing Accessories

7.15 Appendix 11 – Sample Progress Reporting Template for all Stakeholders

The success of the Fashion Industry Strategy depends on several organizations and many stakeholders to work together. Reporting on progress will be important so as to align strength, build energy based on measured progress, find ways to overcome obstacles, and adjust the strategy.

The following template should be used by all stakeholders to report progress on a semiannual basis.

<table>
<tr><td rowspan="5">Strategy Goal:

Strategic Outcome:

Medium Term Policy Framework
(if applicable):

Government Priority(ies):</td><td colspan="6">[Programme Name]
• Description:
• Context:</td></tr>
<tr><td colspan="6">Programme Goal:</td></tr>
<tr><td>Key Policy, Project, Initiative (2013- 2014)</td><td>Budget ($)</td><td><b>Expenditure to Date ($/%)</td><td>End-of-Year Target (Outputs)</td><td>Achievement to Date (Outputs)</td><td>End-of-Year Outcome</td></tr>
<tr><td>1.</td><td></td><td></td><td></td><td></td><td></td></tr>
<tr><td>2.</td><td></td><td></td><td></td><td></td><td></td></tr>
<tr><td>Explanation of Variance</td><td colspan="6"></td></tr>
<tr><td>Mitigating Strategies/ Proposed Schedule Changes</td><td colspan="6"></td></tr>
</table>

7.16 Appendix 12 – Sample Monitoring Plan

Priority Policies, Programmes and Projects	**Output Performance Indicator(s)**	**Baseline Data (2013/2014)**	**Departmental- level major tasks to realise the objective of the priority policy, programme or project**	**Monitoring Frequency (Toward the realisation of the objective of the priority policy, programme or project)**						**Monitoring Method(s)**
				Year (2015/2016)		**Year (2016/2017)**		**Year (2017/2018)**		
				Target	**Monitoring Timeline**	**Target**	**Monitoring Timeline**	**Target**	**Monitoring Timeline**	
Security and Justice Programme	# of infrastructure projects implemented per year	0 infrastructure projects	Development and implementation of 5 infrastructure projects	2 Rapid Infrastructure Projects	Quarterly	2 Rapid Infrastructure Projects	Quarterly	1 Rapid Infrastructure Project	Quarterly	- Site visits (observation) - Project Manager's progress reports
	# of violence prevention programmes and strategies implemented per year	50% youths in each targeted community between ages 9 – 13 received training in conflict management in 2012/2013	Implementation of violence prevention programmes and strategies	12 Conflict resolution intervention sessions	Monthly	4 Restorative Justice Centres operationalize d and functional	Monthly	3 Restorative Justice Centres operationalize d and functional	Monthly	- Site visits (observation) - Manager's progress reports
	Increase in the number skills training opportunities	120 youths between ages 16 – 18 received skills training in 2013/2014	Providing opportunities for vocational skills training	50 youths trained in woodwork and joinery	Quarterly	50 youths trained in welding	Quarterly	100 persons trained in cosmetology	Quarterly	- Focus groups - Training facilitators' reports - Participants' evaluation
[Insert another programme/ project]	*[Insert related performance indicator(s)]*	*[Insert baseline data]*	*[Insert major tasks]*	*[Insert related target]*	*[Insert monitoring timeline]*	*[Insert related target]*	*[Insert monitoring timeline]*	*[Insert related target]*	*[Insert monitoring timeline]*	*[Insert monitoring method(s) to be used]*

7.17 Appendix 13 – Sample Evaluation Plan

Priority Policies, Programmes and Projects	**Goal(s)**	**Expected Outcome(s)**	**Evaluation Type (Frequency)**	**Planned Evaluation Completion Date (mm/yy)**	**Evaluation Method(s)**	**Entity Responsible for Evaluation**
Security and Justice Programme	▪ To reduce incidences of violent crimes by 10% in communities by 2014 ▪ To reduce unemployment by 3% in targeted communities by 2015	▪ Enhanced citizen security and justice in 50 targeted communities ▪ Increased skill-based employment of youths	Mid-term	February 2016	Document reviews, Focus groups, Survey	MNS
[State another policy, programme, or project, if necessary]	*[State related goal(s)]*	*[State related expected outcome(s)]*	*[State type/ frequency of evaluation]*	*[State month & year for the completion of the evaluation]*	*[State evaluation method(s)to be used]*	*[State the entity responsible for the evaluation]*
[State another policy, programme, or project, if necessary]	*[State related goal(s)]*	*[State related expected outcome(s)]*	*[State type/ frequency of evaluation]*	*[State month & year for the completion of the evaluation]*	*[State evaluation method(s)to be used]*	*[State the entity responsible for the evaluation]*
[State another policy, programme, or project, if necessary]	*[State related goal(s)]*	*[State related expected outcome(s)]*	*[State type/ frequency of evaluation]*	*[State month & year for the completion of the evaluation]*	*[State evaluation method(s)to be used]*	*[State the entity responsible for the evaluation]*
[Continue as necessary]	*[Continue as necessary]*	*[Continue as necessary]*	*[Continue as necessary]*	*[Continue as necessary]*	*[Continue as necessary]*	*[Continue as necessary]*

7.18 Appendix 14– Sample Procurement Plan

Item description (What to buy?)	Month when needed (When to buy?)	Quantity (How many to buy?)	From where to buy?	Estimated cost	Procurement Method	Procurement Schedule				
						Advertise (Insert dates)	Submission of Bids (insert dates)	Bid Evaluation and recommendation approval (insert dates)	Contract award (insert dates)	Delivery (insert dates)
YEAR 1 (2011/2012)										
YEAR 2 (2012/2013)										
Item description (What to buy?)	Month when needed (When to buy?)	Quantity (How many to buy?)	From where to buy?	Estimated cost	Procurement Method	Procurement Schedule				
						Advertise (Insert dates)	Submission of Bids (insert dates)	Bid Evaluation and recommendation approval (insert dates)	Contract award (insert dates)	Delivery (insert dates)
YEAR 3 (2013/2014)										

7.19 Appendix 15– Draft Strategic Plan

7.20 Appendix 16– Final Stakeholder Data Sheet

7.21 Appendix 17– Interim Report

7.22 Appendix 18– Stakeholder Data Report

7.23 Appendix 19– Inception Report