



Final Report

Economic and Technical Cooperation

*Seminar on the Fashion and Garment Industry and Economic Development in the Caribbean
Castries, St. Lucia
1 and 2 July 2015
SP/SFGIEDC/IF-15*

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RAPPORTEUR'S REPORT

1. The "Seminar on the Fashion and Garment Industry and Economic Development in the Caribbean" was held in Castries, St. Lucia, on 1 and 2 July 2015. This activity was organized by the Permanent Secretariat of SELA, through the Latin American and Caribbean Regional Programme for Small and Medium-sized Enterprises (SELA-SMEs Programme), with the support of the Organization of Eastern Caribbean States (OECS) and Saint Lucia's Trade Export Promotion Agency (TEPA).

2. In compliance with Decision No. 546 of the Latin American Council, related to the Work Programme of the Latin American and Caribbean Economic System (SELA) for the year 2015, the objectives of this seminar were the as follows: i) Raise awareness among the Member States of SELA of the importance of strengthening sectors with potential for development; in this case, the textile sector, as a mechanism for economic growth and employment generation; ii) Increase awareness of the importance of value chains in Latin America and the Caribbean, in order to facilitate goods manufacturing opportunities, knowledge sharing and access to textiles and raw materials; iii) Review successful programmes for implementation of activities related to the fashion industry; iv) Promote the creation of a network of institutions and experts related to the industry; v) Promote an exchange of the best practices implemented in other regions, such as Latin America and Africa, where best practices allowed the sector to penetrate international markets and whose experiences can be replicated; and vi) Foster and strengthen training of personnel in the design and manufacture of products related to the fashion industry.

3. Participants in this Seminar included governmental focal points for small and medium-sized enterprises in the Caribbean, representatives of the private sector, and companies, in particular SMEs involved in the fashion and garment industry, as well as experts in the field, from Antigua and Barbuda, Barbados, Dominica, Grenada, Guadeloupe, Haiti, Jamaica, Suriname, Trinidad and Tobago, Tortola, Santa Lucia, St. Kitts, St. Vincent; as well as representatives of the Caribbean Association of Industry and Commerce (CAIC), Santa Lucia's Trade Export Promotion Agency (TEPA) and the Organization of Eastern Caribbean States (OECS). The list of participants is included in Annex I.

I. DEVELOPMENT OF WORKS

4. The following authorities took the floor during the opening session:

- a. Mr Antonio Leone Durante, Coordinator of the Regional Latin American and Caribbean Programme for Small and Medium-Sized Enterprises (SELA-SMEs Programme) of the Permanent Secretariat of the Latin American and Caribbean Economic System (SELA) (SP/SFGIEDC/Di No. 1-15); the speech is included in Annex II;
- b. Mr Rodinald Soomer, Head of the Economic Development Policy Unit of the Organization of Eastern Caribbean States (OECS) (SP/SFGIEDC/Di No. 2-15); the speech is included in Annex III; and
- c. Hon. Emma Hypolite, Minister of Commerce, Business Development and Investment of the Government of Saint Lucia (SP/SFGIEDC/Di No. 3-15); the speech is included in Annex IV.

5. The **Business Session** was moderated by Mr Antonio Leone Durante, Coordinator of the Regional Latin American and Caribbean Programme for Small and Medium-Sized Enterprises (SELA-SMEs Programme) of the Permanent Secretariat of the Latin American and Caribbean Economic System (SELA). After presenting the agenda for the Seminar and explaining the

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methodology of work, he gave the floor to Her Excellency Ms Sandra Phillips, Ambassador of Barbados in Venezuela, who made a presentation of the results of the "Seminar on the Apparel Industry and Economic Development in the Caribbean," held in Bridgetown, Barbados, on 14 and 15 August 2014. This event is considered a significant background to discuss the potential of the fashion and garment industry in the Caribbean countries and the important role that micro, small and medium-sized enterprises can play in this sector.

PANEL I: PROSPECTS FOR THE FASHION AND GARMENT INDUSTRY IN THE ECONOMIC DEVELOPMENT OF THE CARIBBEAN. PUBLIC POLICY RECOMMENDATIONS TO SUPPORT THE FASHION AND GARMENT INDUSTRY IN THE CARIBBEAN was moderated by Mr Rodinald Soomer, Head of the Economic Development Policy Unit of the Organization of Eastern Caribbean States (OECS) Commission, who after a general presentation of the issue gave the floor to representatives of governmental focal points of SMEs in the Caribbean.

Nora Blake, Technical Officer and Special Advisor of the Ministry of Industry, Investment and Commerce (MIIC) of Jamaica, made a presentation entitled "Prospects for Fashion and Garment Industry in the economic development of the Caribbean" (SP/SFGIEDC/Di No. 4-15). She stressed that the Caribbean has potential to become a global fashion centre to provide incomes, earn foreign exchange, create more jobs for women and others, contribute more to trade, GDP and employment, provide opportunities for export diversification and expansion. There are several niches in the industry with great potential for development: clothing for men and women, the bridal/wedding market, accessories, upholstery and children's wear (school uniforms, etc.), institutional wear (police, army, and hospital workers), sportswear. As for the building and revitalization of the fashion industry in Jamaica, the Ministry started facilitation and held meetings with key stakeholders in the area, including entrepreneurs, designers, manufacturers and marketers of clothing, textiles, jewellery, footwear, handbags and hats to revive a once vibrant industry in Jamaica, which contributed greatly to manufacturing's 7% to GDP. A Steering Committee was formed to take into consideration the advantages of operating under a cooperative organizational structure and deal with pressing local needs identified, such as lower energy costs, financing funds, teaching, and training. As a follow-up, a Sub-Committee of the Working Group was set up to revise and improve the design; this exercise was completed to the extent that it now incorporates a syllabus for entrepreneurship in fashion. With a Textile Engineer in the Working Group, there is a keen interest in the indigenous textile production, to lend itself toward the creation of a unique "Jamaican look" in fashion and design, which will create high value-added products, aligned with the Jamaican culture, mainly our reggae music and also our sporting prowess. In addition, the planting of cotton is being revitalized with some assistance from Japan; as well as the use of bamboo for textile production. An official market analysis survey should be commissioned to guide MSMEs by quantifying the size of the market and keep them motivated. Also, there is need for funding to assist in the setting-up of an efficient e-Commerce platform to facilitate trade in the global space and the logistics of moving goods to market. The most critical areas in the sector are: public awareness to attract entrepreneurs to the industry; the development of new products, driven by standards, global acceptance and competitiveness; the role of credit unions as a source of "own funds;" the need to pursue knowledge transfer from first-generation fashion designers, possibly through an apprenticeship programme; government facilitation of a duty-free "one-stop shop" for raw materials, thus allowing for greater price competitiveness in the global space. Under public policy, consideration must be given to: the factors that constraint participation of women in business and the building of organizational capacity and availability of funds to finance business start-ups and growth; facilitation of training; establishment of incubators to facilitate innovation, especially for youths and for the use of indigenous materials / fibres / textiles; the full inclusion of persons with disabilities who desire to participate in the fashion industry as per the MSME policy;

increased funding for small-scale entrepreneurship ventures; establishment of projects and programmes on entrepreneurship, including the fashion and garment industry directed specifically to youths. As a conclusion, she mentioned that this Seminar should be seen as a part of that process for the South-South links on best practices in leading sister States, such as Trinidad, Brazil, Mexico and cutting-edge countries in Africa. As a matter of policy, the Government of Jamaica in the recently enacted MSME Entrepreneurship Policy (2014) has laid out an amount for the fashion and design sector. Finally, with the promulgation of the Copyright Act and the establishment of the Creative Industries Council, the fashion and design sector is given a special place of inclusion.

6. Suriname: Marion Stekkel-Vroom, Chair of the Women in Business Group of the Suriname Business Forum (SBF), made a presentation entitled "Foster and strengthen training of personnel in the design and manufacture of products related to the fashion industry" (SP/SFGIEDC/Di No. 5-15). She stressed that the Caribbean has the potential to become a dynamic fashion and garment industry because of its diversity of cultures. Therefore, it is important to raise awareness and strengthen the sector potential for development. Even Suriname can hereby make a significant contribution because of its cultural heritage, which is reflected in the seven different ethnic groups that live peacefully with each other regardless of their culture and religion. For the fashion industry, these influences are of great importance to develop the trend of fashion styles. The Micro, small and medium-sized enterprise is the backbone of the economy. Many entrepreneurs are active in the fashion branch and some of them have not had adequate training and these are more family businesses from generation to generation. The staff they attract are young people, mostly school dropouts who have not completed training in the industry. That results in low productivity and high costs. Since many young people seek a living in the fashion industry, an effort should be made to deal with the challenges facing the SME sector. In this connection, it would be better to have motivated and skilled young people around to develop the sector. To properly accommodate this industry, a youth fashion society in the region will have to focus on two major training courses for fashion designers and fashion merchandisers.

7. Trinidad y Tobago: Glenda Joseph-Dennis, Member of the Board of Directors of the National Entrepreneurship Development Company Limited (NEDCO) of the Ministry of Labour and Small and Micro Enterprise Development, made the presentation "Prospects for the fashion and garment industry in the economic development of the Caribbean. Public policy recommendations to support the fashion and garment industry in the Caribbean" (SP/SFGIEDC/Di No. 6-15). The Caribbean countries have long been beneficiaries of development cooperation (assistance/aid), and in the current global circumstances this support is welcomed. However, the policies of this cooperation do not appear to adequately surmount all our challenges of sustainable development and so a new approach to development has been called for, focusing specifically on fashion as one of the creative industries that has captured the attention of policymakers, academia and even the media in creating this new paradigm for development. The fashion industry is important to the Caribbean, since they are for the most part SMEs that belong to the largest contributing group of companies with significant share of employment. In the context of Trinidad and Tobago, it is considered one of the priority non-energy sub-sectors within the creative industries for development, trying to pursue the necessity of economic diversification. Data on the fashion industry have not been consistently available, but in 1978, 130 garment-manufacturing firms were registered, with over 7,000 people employed in this sector; a recent survey (2014) showed that there are more than 200 companies. In 2006, the fashion industry in Trinidad and Tobago generated in excess of US\$ 60 million annually and employed more than 11,000 persons directly or indirectly. More recent data (yet to be published) indicate that the annual turnover has exceeded T\$ 100,000,000 in 2014. At the institutional level, Trinidad and Tobago offers the Caribbean Academy of Fashion and Design (CAFD), which is fully integrated into the University of Trinidad and Tobago (UTT); the Fashion

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Week Trinidad and Tobago (FWTT); the Tobago Fashion Weekend; the San Fernando Fashion Week; the Fashion Association of Trinidad and Tobago (FATT); and the Fashion Entrepreneurs of Trinidad and Tobago (FETT). As for the government policy, the Ministry of Labour and Small and Micro Enterprise Development and the Ministry of Trade, Industry, Investment and Communication have been instrumental in conceptualizing and implementing policy initiatives for SMEs. At present, the main document guiding policies in the matter is the Government's Medium Term Policy Framework 2011-2014 and the Draft MSE Policy 2013-2016. The implementing agency for SME development in Trinidad and Tobago is the National Entrepreneurship Development Company (NEDCO), while the specific fashion industry development is the mandate of the Trinidad and Tobago Creative Industries Company Limited. Trinidad and Tobago intends to implement policies that facilitate growth and competitiveness of the fashion industry by addressing such issues as improvement of market access; skills and technology; encouragement of innovation and use of communication technology; access to finance; prudent investment; research and data generation. Trinidad and Tobago embraces this regional approach and looks forward to working with SELA, OECS and TEPA in bringing the fashion industry in the region to global economic standards and sustainable competitiveness.

8. The moderator thanked the speakers for their presentations and made a brief summary of the main ideas expressed during the Session. Then, he gave the floor to participants interested in making remarks and questions, which focused on the fashion culture, public policies for SMEs and the free diversification in the fashion and garment industry, with emphasis on innovation. Participants analyzed the progress made in this area with the help of international organizations, in particular finance for new designers; they mentioned that the Caribbean region has everything to make the fashion and garment industry more dynamic and viable, stressing the need for more initiatives and greater control on public policies for this sector.

9. **PANEL II: EXPERIENCES OF CLUSTERS AND VALUE CHAINS IN THE FASHION AND GARMENT INDUSTRY TO PROMOTE ECONOMIC DEVELOPMENT IN THE CARIBBEAN. FACTORS TO STRENGTHEN CLUSTER FORMATION AND VALUE CHAINS: THE GUADELOUPE EXPERIENCE.** This panel was moderated by Jacqueline Emmanuel, Chief Executive Officer of Saint Lucia's Trade Export Promotion Agency (TEPA), who introduced the topic and then gave the floor to the speaker and participants in this working session.

10. Teddy Isimat-Mirin, representative of Stratégies Caraïbes of Guadeloupe, made a presentation entitled "Factors to strengthen value chain in fashion sector, CREATIVE 2020. The Guadeloupe Experience" (SP/SFGIEDC/Di No. 7-15). La Tribu and Stratégies Caraïbes (LT & SC) consider the Caribbean their common creative laboratory with global markets; regional cooperation at early stages is a must; and fashion enjoys the best comparative advantages among regional creative sectors. CREATIVE 2020 is a proposal created as a brand label, an organization chart and an objective for regional promotion (trade missions, regional representation, and networks); distribution; international networks; regional cooperation; technical assistance; education; and export. Strategic factors: success equals creativity plus management; value creation must be encouraged through all the chain; a full and specialized assistance is required in support to regional brands; a "community of views" and regional cooperation are compulsory. Our proposal: availability to share with all regional stakeholders; interest to strengthen a Caribbean community of views; availability to provide technical assistance.

11. After this presentation, the floor was taken by Ms Sandra Joseph, Permanent Secretary of the Ministry of Commerce, Industry, Sports and Culture of Antigua and Barbuda, and Mr Dav-Ernán

Kowlessar, Business Development Associate Consultant of the Caribbean Association of Industry and Commerce (CAIC).

12. The moderator thanked the speakers for their presentations and encouraged participants to make remarks and questions. They discussed the role of the private sector, its importance for the sector; they talked about the value of positioning brands at national and regional levels to turn them into a Caribbean reference; they also mentioned the necessity of sharing interests for the creation of value chains and economic development in the sector.

13. **PANEL III: "POSITIONING THE CARIBBEAN TO WIN: PENETRATING THE INTERNATIONAL FASHION MARKET"** was moderated by Mae Wayne, representative of The Star Publishing Company of Santa Lucia, who introduced the speaker scheduled for this working session and gave her the floor.

14. Trinidad and Tobago: Liza Miller, Director General of Estuary PR Limited and Executive Director of Kaj Designs Limited, made a presentation entitled "Positioning the Caribbean to win: penetrating the international fashion market" (SP/SFGIEDC/Di No. 8-15). Fashion is driven by design; often the predominant thought is of the creative side only, but it is critical to consider the business and marketing of fashion. In general, the 95% of fashion companies fail, and in the Caribbean, there is a pool of creative talent, but weaknesses and challenges hinder success in this branch. Building Caribbean success, some of the challenges include the following: creating a strong and consistent brand image; defining the market; having a clear management and decision-making structure; winning value proposition and promoting the ability to change and/or adapt. Fast fashion vs. luxury fashion: fast fashion is low-cost clothing that mimics the current, high-cost, luxury fashion trends, with low production costs and profit margins; it is a mass market approach, whose profit hinges on volume of sales. This market has shown a growth rate of 8% in the United Kingdom. However, profit margins are low and become environmentally unsustainable and vulnerable to rising material, transport and labour costs. 78% of people did not know that 11 million tons of textiles are trashed each year. For its part, luxury fashion is authentic in design; production and inputs are of high quality; the product is exclusive and packaging is premium. The luxury goods market is growing steadily; the projected value is €340.41bn globally by the year 2020 (Transparency Market Research, 2015). Competing in the fast fashion market: achieving a high design demand to stay on trend; assessing demand to meet mass production quotas; maintaining competitive prices; ensuring environmental sustainability and ethical production practices; facing rising material, transport and labour costs. Competing in the luxury fashion market: winning value proposition; creating a high quality and exclusive product; and positioning the Caribbean to win. Our greatest hindrance to succeeding is our lack of cultural confidence. We must believe in ourselves and our creative talents. One of the greatest investments we can make is growing capacity in the areas of business administration and marketing of fashion.

15. Then, the moderator encouraged participants to make remarks and questions. Participants spoke of the need to invest in development, highlighting the use of social networks for the fashion industry and the ease of positioning brands around the world through these tools; they stressed the need to develop links through networks and to know the importance of marketing and access to the global market to which the message is directed.

16. **PANEL IV: OECS FASHION INDUSTRY VALIDATION EXERCISE** was moderated by Mr Sobers Esprit, Business Development Officer – Creative Industries of the OECS Competitive Business Unit, who introduced the topic and gave the floor to Ms Virginia Paul, Head of the Trade Policy Unit of the OECS Commission.

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17. Then, Ms Michele N. Reis, Consultant/Researcher on Migration and Diaspora issues of Trinidad and Tobago, made a presentation entitled "Regional Validation Meeting on the Fashion and Garment Industry in the OECS. Presentation of the OECS Fashion Industry Assessment Report" (SP/SFGIEDC/Di No. 9-15). The objective of the consultancy was to assess the viability of the fashion sector in the OECS to determine its potential to create and generate employment, as well as to assess the needs of industry stakeholders to contribute to the overall diversification of the economy. This consultancy was carried out in the following stages: Phase One (Mobilization) - preparation of survey instruments; Phase Two (Country Assessments) - Inception Report; Phase Three (Analysis) - Analytical Report: (Situational Analysis, SWOT Analysis, PEST Analysis, Database, Recommendations). Consultation was carried out in 9 Member States with industry professionals (Grenada, SVG, SLU, Antigua, British Virgin Islands, Anguilla, SKN, and Dominica) and concluded that, at the global level, creative industries are one of the fastest growing areas with potential for transformation; R&D and innovation strategies are beyond the reach of most industry professionals; few people have successful businesses based on innovative, unique products that are export-ready, since most people cannot compete internationally. Therefore, the business aspect of the fashion industry should be improved; suppliers, especially financing institutions, need to lend consistently over a period of at least three years for stakeholders to be taken seriously on the international market; local market studies and standards need to become a regular feature of the industry; better data are required (disaggregated by segment, trade, contribution to GDP, employment figures, etc.); in addition, better sourcing of raw materials and notions; need for greater cohesion and less fragmentation in the fashion industry; and formal training to hone the natural talent of emerging designers.

18. Afterwards, the floor was taken by the following representatives of Caribbean SMEs: Nadia Jabour, Design by Nadia of Santa Lucia; Jessie-Ann Jessamy, Veronica's Visions Design Studio of Grenada; and Kristin Frazer, Trefle Clothing of Tortola, who expressed their opinions and points of view on the subject.

19. Interventions and questions in this session were based on an overview of the OECS assessment process of the fashion industry, including the consultation process, the research work, the background of the report to understand what programmes and schools should be submitted to such assessment, as well as the frequent reluctance to carry out the consultation. The final reflection focused on how trends must be created in accordance with what surrounds us and is of high quality.

20. **PANEL V: EDUCATION AND TRAINING FOR FASHION INDUSTRY IN THE CARIBBEAN** was moderated by Ms Taribba do Nascimento, Managing Director of Meme Bete, St. Lucia, who introduced the topic and gave the floor to participants scheduled for this working session.

21. Speakers in this session included Carmen Penco, President of Carmen Penco School of Fashion Design, St. Lucia, and Marlyn Jean Jacques, Managing Director of Caribbean Apparels, Dominica. Interventions and questions in this session dealt with the importance of education for the fashion industry in the region; the need to show proficiency in a certain area and demonstrate the capacity to work in it in order to improve the quality of products. Participants also spoke of the need to provide training, offering economic and accessibility facilities to stakeholders, taking into consideration the difficulties of schools to obtain teaching inputs; the importance of technology and innovation, the private sector and companies and their collaboration with the public sector to provide assistance and training. It became clear that much remains to be done in this field.

22. **PANEL VI: MANUFACTURING FOR GARMENT AND FASHION: THE CASE OF HAITI** was moderated by Mr Sobers Esprit, Business Development Officer – Creative Industries of the OECS Competitive Business Unit.

23. Haiti: Charlotte Tanis, Designer and Owner of Your Size Tailoring Shop in Haiti, made a presentation entitled "Prospects for fashion and garment industry in the economic development of the Caribbean. Public policy recommendations to support the fashion and garment industry in the Caribbean" (SP/SFGIEDC/Di No. 10-15). She referred to the panoramic view on the textile and garment industry in the international context; she said during the years 60-70, the textile and garment industry went through a process of internationalization with the fragmentation of production processes and the use of outsourcing; open markets and relocations of companies in the sector resulted in the expansion of this industry. The garment and textile industry (textiles, clothing and luxury) holds a very important place in the global economy, reaching a turnover of US\$ 3,000 billion in 2011. Therefore, the textile and garment industry has the potential to contribute significantly to the development due to its weight in the economy and help reduce poverty. In the national context in Haiti, nearly 60% of poor people are self-employed working in the informal sector. Extreme poverty is higher in rural areas and tends to stagnate around 40%. Haiti is the most "unequal" country in Latin America and the Caribbean in terms of wealth distribution. The diversification of the rural economy and the integration of the textile industry could contribute to poverty reduction in rural areas. The clothing and textile industry in Haiti also plays a fundamental role in the economy. This sector represents over 80% of total exports. In 2009, Haiti exported apparel to the United States for US\$ 514 million. In 2012, this value increased to US\$ 731 million, an increase of over 40% of the value of exports. In 2013, the textile and clothing industry accounted for 91% of export revenues (US\$ 804 million) and 9% of GDP (US\$ 84 million). The clothing industry is one of the largest employers in Haiti, allowing more than 30,000 people to have formal employment (65% are women). In 2014, a new industrial park was inaugurated in the North East Department within the framework of the implementation of the Strategic Plan of Development of Haiti (PSDH), set up after the earthquake of 2010. The geographical situation of Haiti, close to the main markets in North America and the Panama Canal, represent great opportunities for the textile, clothing and leather. Several international organizations such as the Inter-American Development Bank (IDB), provide considerable support to Haiti in order to promote the development of the textile sector. Institutions and individuals (designers in New York and Italy, among others) of the private sector in the United States and the American Catholic Church have repeatedly expressed their interest in this sector. This tendency to attract the private sector of other countries highlights the potential that Haiti is beginning to enjoy in the industry. However, the lack of organization of some companies within the sector and the low skills of the local workforce have not allowed the country to exploit opportunities.

24. Interventions and questions during this session focused on what strategy would be the best to reach the international market. Participants concluded that training and empowering people with skills for the industry and using their abilities in the production process to make competitive quality parts had been the best way for Haiti to position itself in the global market.

25. **PANEL VII: FINANCING OPTIONS FOR THE DEVELOPMENT OF THE FASHION AND GARMENT INDUSTRY IN THE CARIBBEAN** was moderated by Fern Lewis, Director of Export Development and Promotion of Barbados Investment and Development Corporation (BIDC).

26. Dav-Ernán Kowlessar, Business Development Associate Consultant of the Caribbean Association of Industry and Commerce (CAIC), made the presentation "Promoting economic development in the fashion and garment industry. Factors to strengthen cluster formation and value chains" (SP/SFGIEDC/Di No. 11-15). He stressed that globally, the fashion and garment industry is

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a buyer-driven value chain that contains three major types of lead firms: retailers, marketers and branded manufacturers. He explained that global value chains are motivated by cost advantages, and evolution is centred in terms of manufacturing and retailing with relocation of manufacturing across the value chain. This relocation of manufacturing is due to emergence of new markets, such as Brazil and Russia; and new techniques to attract consumers. Several questions were made about where the Caribbean is as regards raw material input-synthetic fibres, the use of natural resources, global brands, among others. He said there are some gaps in value chains, including business linkage and understanding; building of brand identity; need to belong to something. In this connection, value chains would be strengthened through clusters or the creation of the Caribbean Fashion Council; search for prioritization by Caribbean Governments; building of trust and leverage networks; strength and support to regional initiatives rather than reinventing. Among CAIC commitments are the following: provide a support network for the development of business support infrastructure and culture; provide access to international markets; offer information on international market opportunities to regional businesses and on opportunities in LAC to international buyers and investments; and facilitate conversion of development initiatives.

27. Next, the moderator gave way to interventions and questions. During the Session, participants discussed several issues, including: financing for research; different experiences in the Caribbean on financing in the fashion industry; the importance of demonstrating that a business is viable for financiers. Finally, they reiterated that fashion must be considered a business, and the sooner the industry is seen as a business, the easier will be to raise funds and find out investment and development opportunities.

28. **GENERAL DEBATE. CONCLUSIONS AND RECOMMENDATIONS.** In this Session, the floor was taken by Mr Antonio Leone Durante, Coordinator of the Regional Latin American and Caribbean Programme for Small and Medium-Sized Enterprises (SELA-SMEs Programme) of the Permanent Secretariat of the Latin American and Caribbean Economic System (SELA); Ms Sandra Phillips, Ambassador of Barbados in the Bolivarian Republic of Venezuela; Ms Jacqueline Emmanuel-Flood, Chief Executive Officer of Saint Lucia's Trade Export Promotion Agency (TEPA); and Ms Virginia Paul, Head of the Trade Policy Unit of the Organization of Eastern Caribbean States (OECS) Commission.

II. CONCLUSIONS AND RECOMMENDATIONS

The conclusions and recommendations were grouped according to the issues linked with the development of the fashion and garment industry, making emphasis on the specific aspects that somehow reflect the actions that should be taken to promote this sector:

a) Public Policy and General

- The Caribbean has talent in fashion (e.g. in design, fashion modelling) but lacks other inputs or features or factors that would allow one to say that it has a fashion industry
- The Caribbean does not have a real fashion sector. The activity in fashion is too unstructured and the region cannot compete in wage levels, quality, productivity or finished goods.
- A 'breakthrough' in the global fashion market will not just 'happen'. The region has to plan it and work towards it.
- Using the example of public policies in Jamaica, the region should seek to finalize or stimulate fashion industries, undertaking the necessary consultative and analytical work in a cooperative, non-insular way

- The region should lower energy costs fashion, develop indigenous textile products, consider the visitor and diaspora as target markets
- We should develop new products driven by standards and competitiveness
- Governments can give support by creating necessary enabling legislation and by committing a percentage of its procurement needs to its domestic fashion and garment sector
- The Chinese market is a significant challenge for Caribbean garment industries. Chinese do not have high-quality mass production suitable for the Caribbean climate
- There is a lack of mass-production facilities in the Caribbean. Skilled labour, and sourcing raw materials
- We need a new approach that rejects old development models whereby culture and the creative sector were seen as entertainment or impediments to progress. In the new paradigm, culture and the creatives are contributors to development.
- The Caribbean faces an issue of cultural confidence. Domestic markets too often favour foreign brands simply because they are foreign. Those who want to enter the luxury market are not given encouragement or support because it is not felt that anything manufactured in the Caribbean can be of quality.
- Young people with talent are encouraged to leave the Caribbean because being based in the Caribbean is not associated with success. This is one of the attitudinal issues that contributes to the lack of cultural confidence
- The OECS needs a structure and better defined strategic approach. The OECS needs to consider global value chains and determine if we can produce at standards required
- The Caribbean is not prepared for the fast-fashion market. The mid-luxury market is probably more a feasible target.
- Instagram is an overlooked mechanism that Caribbean designers should consider, while remembering that what is first needed is a strong brand.
- In the Caribbean, there is a persistent failure to clearly define the target market. Fashion centres cannot be developed unless there is a specific target market
- A structured effort to market fashion to the visitor market is needed
- Brands, identities and distribution policy are crucial to regional business models.
- International competition is fierce and competitive positions in fashion are already occupied

b) Financing

- We should consider scope for credit unions to play in financing fashion
- Generally there is a need to increase funding for small-scale entrepreneurs in fashion
- While paying due regard to the sector-wide initiatives, we should develop fast-tracking mechanisms that single out designers with the greatest market potential (or 'pick a winner') and allocate significant resources to that designer to give them the requisite push.
- A suggestion was made for OECS programme that would focus on ten people in a clearing process that would then select the best five
- A suggestion was made for a competitive fashion show with clearly defined criteria defined
- There is need to pursue low interest financing schemes
- Guarantee funds from Governments to banks help to address the risk-factor for commercial banks whom designers may be approaching for loans.
- There is a need for inter-agency collaborations and more public-private partnerships. The usual bank requirement for collateral is a challenge for designers. Crowd-funding, angel funding and venture capital can present legal challenges

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- Governments in developed countries such as the US and UK subsidize their fashion industries in various ways. There is not a level playing-field and therefore the support from the public sector for the apparel industry in the Caribbean is very much needed
- It is important to determine if the business is investor friendly.
- Venture capital is equity. It is not debt finance
- Credit comes at a cost but managed well is a good source of financing
- Collaborative joint ventures should be considered
- Cooperatives and credit unions can have a greater role.
- We do not need new institutions, we need to improve what we have
- We need to leverage on the technical assistance that is available
- SELA has been trying to mobilize the Caribbean to develop a regional guarantee scheme. There will be a meeting in October 2015 aimed at the Caribbean
- Financing from commercial banks for designers tends to be challenge for banks. Inter alia, small businesses need technical assistance and capacity building which are transaction costs for the banks

c) Training

- In assessing technical skills, the poorest area is in the construction. CVQs must address.
- CXC addresses theory. CVQ is a competency-based education.
- While opportunities now exist for certification, the CVQs need to be updated and reviewed. The process for review is demanding and cumbersome
- CVQs are very general. They would need to be tweaked to have a specific feature or focus for development of NVQs
- Formal training is needed for entrepreneurs. They lack the technical skills, skills in fashion merchandising.
- Youth are a target group for fashion training as young people are very involved in the fashion industry
- We need to upgrade training and education offered at the CXC level , using the insights of our experienced designers
- We need to establish incubators, facilitate apprenticeship both domestically, regionally and extra-regionally
- Caribbean and National Standards should be kept at the proper professional standard. They should not be lowered to suit the skills that exist. Rather they should be set where skills need to reach

d) Follow-up and Institutional

- The participants agreed that there would be an informal follow-up group to ensure that there was implementation of the recommendations of the Seminar and noted that a previous proposal to that effect had been made at the first Seminar.
- The informal follow-up group would be called the SELA Follow-up Working Group on the Apparel Industry and Economic Development in the Caribbean sub-region
- The informal Working Group will mobilize, encourage and remind participants to take steps towards implementing or mobilize the implementation of these seminars
- The first tasks of the Follow-up Working Group will be to:

- (i) Remind participants to take steps towards
 - the creation of National Associations
 - the creation of a Regional Association
 - the inclusion of proposals for the Apparel Sector in their National Strategic or Development Plans
- (ii) Discuss the design of a Regional Fashion Project.

III. CLOSING SESSION

The closing session of the Seminar was conducted by Mr Antonio Leone Durante, Coordinator of the Regional Latin American and Caribbean Program for Small and Medium-sized Enterprises (SELA-SMEs Programme), of the Permanent Secretariat of the Latin American and Caribbean Economic System (SELA); Ms Jacqueline Emmanuel, Director of Saint Lucia's Trade Export Promotion Agency (TEPA); and Mr Sobers Esprit, Business Development Officer of the OECS Competitive Business Unit.

A N N E X I

AGENDA

SEMINAR ON THE FASHION AND GARMENT INDUSTRY AND ECONOMIC DEVELOPMENT IN THE CARIBBEAN

Venue: Castries, St. Lucia (Bay Gardens Hotel)

Date: 1 and 2 July 2015

Background

During the “Seminar on the Apparel Industry and Economic Development in the Caribbean”, held in Bridgetown, Barbados, participants analyzed the problems faced by the SMEs sector in the Caribbean, particularly those micro-enterprises working in the fashion and apparel sectors, identifying several niches with a high potential for these Caribbean businesses to develop (clothes for men and women, wedding dresses, accessories and upholstery). In addition, the seminar also examined the increased activity of this sector in the Brazilian, Mexican and African markets, which has rapidly emerged within the textile industry and has attracted several international high fashion brands to different countries of the region.

Among the main conclusions and recommendations of the seminar held in Barbados, experts and representatives pointed to the need to promote the development of a fashion industry with potential for global marketing; change strategies in terms of the use and adoption of the sectoral method to reposition the sector with a key focus on the capacity of designers and manufacturers to create partnerships; and design a single identity for selling brands. Furthermore, they made a recommendation to promote the establishment of national associations and a Regional Association of fashion designers, and they stressed that the revival of cotton cultivation in Barbados must be supported by the public sector.

The textile industry has always been a very active sector in the global economy. In particular, the fashion design industry has recorded an increase of US\$ 1.7 trillion in 2012, employing about 75 million people worldwide.

The CARICOM countries have remained on the margins of the industrial sector of fashion design, and their products have not yet been able to enter international markets in a significant way. However, there are numerous SMEs, particularly micro-enterprises, engaged in the apparel industry and in fashion design.

In this connection, based on the recommendations arising from the meeting in Barbados, the Permanent Secretariat has considered the possibility of conducting a second seminar on the implementation and development of programmes related to partnerships in the apparel and fashion industry in the Caribbean, primarily focused on coordination mechanisms for enterprises in the textile sector, particularly micro-entrepreneurs. The meeting – to be organized by the Permanent Secretariat together with the countries of the Organization of Eastern Caribbean States (OECS) and the Caribbean Community (CARICOM) – would analyze and promote partnerships among companies in the textile sector in the OECS region and the Caribbean as a whole.

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Objectives

In compliance with the Work Programme of SELA for 2015, adopted by the Latin American Council, the objectives of this activity are as follows: i) Raise awareness among the Member States of SELA of the importance of strengthening sectors with potential for development; in this case, the textile sector, as a mechanism for economic growth and employment generation; ii) Increase awareness of the importance of value chains in Latin America and the Caribbean, in order to facilitate goods manufacturing opportunities, knowledge sharing and access to textiles and raw materials; iii) Review successful programmes for implementation of activities related to the fashion industry; iv) Promote the creation of a network of institutions and experts related to the industry; v) Promote an exchange of the best practices implemented in other regions, such as Latin America and Africa, where best practices allowed the sector to penetrate international markets and whose experiences can be replicated; and vi) Foster and strengthen training of personnel in the design and manufacture of products related to the fashion industry.

Participants

This activity is aimed at the governmental focal points for small and medium-sized enterprises from SELA Member States, representatives from SMEs business associations and experts in this field.

AGENDA**Wednesday, 1 July 2015****Morning**8:00 - 8:30 **REGISTRATION**8:30 - 9:00 **OPENING SESSION**

Chairman: Mr Sobers Esprit, Business Development Officer, OECS Competitive Business Unit (OECS/CBU)

- [Mr Antonio Leone Durante](#), Coordinator of the Regional Latin American and Caribbean Programme for Small and Medium-Sized Enterprises (SELA-SMEs Programme). Permanent Secretariat of the Latin American and Caribbean Economic System (SELA)
- [Mr Rodinald Soomer](#), Head, Economic Development Policy Unit, Organization of Eastern Caribbean States (OECS) Commission
- [Hon. Emma Hypolite](#), Minister of Commerce, Business Development and Investment, Government of Saint Lucia

9:00 - 9:15 **BUSINESS SESSION:****REVIEW OF 2014 REGIONAL SEMINAR IN BARBADOS**

Presenter: Mr Antonio Leone Durante, Coordinator of the Regional Latin American and Caribbean Programme for Small and Medium-Sized Enterprises (SELA-SMEs Programme). Permanent Secretariat of the Latin American and Caribbean Economic System (SELA)

- Ms Sandra Phillips, Ambassador of Barbados in Venezuela

9:15 - 10:30 **PANEL I: PROSPECTS FOR THE FASHION AND GARMENT INDUSTRY IN THE ECONOMIC DEVELOPMENT OF THE CARIBBEAN. PUBLIC POLICY RECOMMENDATIONS TO SUPPORT THE FASHION AND GARMENT INDUSTRY IN THE CARIBBEAN**

Moderator: Mr Rodinald Soomer, Head, Economic Development Policy Unit, Organization of Eastern Caribbean States (OECS) Commission

Representatives of governmental focal points for SMEs in the Caribbean

- Jamaica: [Prospects for Fashion and Garment Industry in the economic development of the Caribbean](#). Nora Blake, Technical Officer and Special Advisor. Minister of Industry, Investment & Commerce
- Suriname: [Foster and strengthen training of personnel in the design and manufacture of products related to the fashion industry](#). Marion Stekkel, Chair of the Women in Business Group. Suriname Business Forum
- Trinidad and Tobago: [Prospects for the Fashion and Garment Industry in the Economic Development of the Caribbean. Public Policy Recommendations to support the Fashion and Garment Industry in the Caribbean](#). Glenda Joseph-Dennis, Member of Board of Directors. National Entrepreneurship Development Company Limited (NEDCO). Minister of Labour and Small and Micro Enterprise Development

10:30 – 10:45 Coffee Break

10:45-12:30 QUESTIONS AND ANSWERS

12:30 – 2:30 **LUNCH**

Afternoon

2:30 – 3:30 **PANEL II: EXPERIENCES OF CLUSTERS AND VALUE CHAINS IN THE FASHION AND GARMENT INDUSTRY TO PROMOTE ECONOMIC DEVELOPMENT IN THE CARIBBEAN. FACTORS TO STRENGTHEN CLUSTER FORMATION AND VALUE CHAINS: THE GUADELOUPE EXPERIENCE**

Moderator: Ms Jacqueline Emmanuel-Flood, Chief Executive Officer, Saint Lucia Trade Export Promotion Agency (TEPA)

- [Factors to strengthen value chain in fashion sector: CREATIVE 2020 "The Guadeloupe Experience"](#). Teddy Isimat-Mirin. Stratégies Caraïbes of Guadeloupe

Intervention from:

- Ms Sandra Joseph, Permanent Secretary, Ministry of Trade, Commerce, Industry, Sports and Culture, Antigua & Barbuda.
- [Promoting economic development in the Fashion and Garment Industry: Factors to strengthen cluster formation and value chains](#). Dav-Ernan Kowlessar, Business Development Associate Consultant, Caribbean Association of Industry & Commerce (CAIC)

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- 3:30 – 4:00 QUESTIONS AND ANSWERS
- 4:00 – 4:15 Coffee Break
- 4:15 – 4:45 **PANEL III: “POSITIONING THE CARIBBEAN TO WIN: PENETRATING THE INTERNATIONAL FASHION MARKET”**
Moderator: Mae Wayne, The Star Publishing Company, St. Lucia
- [Positioning The Caribbean To Win: Penetrating the International Fashion Market](#). Ms Liza Miller, Manager Director, Estuary PR Limited, Trinidad & Tobago
- 4:45 – 5:15 QUESTIONS AND ANSWERS
- 5:30 Closing session for the day

Thursday, 2 July 2015**Morning**

- 9:00 - 10:00 **PANEL IV: OECS FASHION INDUSTRY VALIDATION EXERCISE**
Moderator: Mr Sobers Esprit, Business Development Officer – Creative Industries OECS Competitive Business Unit
- REMARKS**
- Ms Virginia Paul, Head, Trade Policy Unit, Organization of Eastern Caribbean States (OECS) Commission
- [Presentation of the OECS Fashion Industry Assessment Report](#). Michele Reis, Fashion Industry Consultant. Trinidad & Tobago
- Responses from OECS SMEs:**
- Nadia Jabour – Design by Nadia – St. Lucia
 - Jessie-Ann Jessamy – Veronica’s Visions Design Studio - Grenada
 - Kristin Frazer – Trefle Clothing – Tortola, BVI
- 10:00 – 10:30 QUESTIONS AND ANSWERS
- 10.30 – 11:00 Coffee Break
- 11:00 – 12:00 **PANEL V: EDUCATION AND TRAINING FOR FASHION INDUSTRY IN THE CARIBBEAN**
Moderator: Ms Taribba do Nascimento, Managing Director, Meme Bete, St. Lucia
- Ms Carmen Penco, President, Carmen Penco School of Fashion Design, St. Lucia

- [CVQ and the Fashion Industry](#). Marlyn Jean Jacques, Managing Director, Caribbean Apparels, Dominica

12:00 – 12:30 QUESTIONS AND ANSWERS

12:30 – 1:30 **LUNCH**

Afternoon

1:30- 2:00 **PANEL VI: MANUFACTURING FOR GARMENT AND FASHION: THE CASE OF HAITI**

Moderator: Mr Sobers Esprit, Business Development Officer – Creative Industries, OECS Competitive Business Unit

- [Prospects for Fashion and Garment Industry in the Economic Development of the Caribbean](#). Charlotte Tanis, Owner of Your Size Tailoring Shop

2:00 – 2:30 QUESTIONS AND ANSWERS

2:30 – 3:00 **PANEL VII: FINANCING OPTIONS FOR THE DEVELOPMENT OF THE FASHION AND GARMENT INDUSTRY IN THE CARIBBEAN**

Moderator: Fern Lewis, Director of Export Development and Promotion. Barbados Investment and Development Corporation (BIDC).

- Ms Hermina Danzie Vitalis, Country Manager, Axcel Finance, St. Lucia
- Mr Jatou Jn. Baptiste, Small Business Loans Officer, Axcel Finance, St. Lucia
- Mr Dav-Ernan Kowlessar, Business Development Associate Consultant, Caribbean Association of Industry & Commerce (CAIC)

3:00 – 3:30 QUESTIONS AND ANSWERS

3.30 - 4:30 **GENERAL DEBATE: CONCLUSIONS AND RECOMMENDATIONS**

- Mr Antonio Leone Durante, Coordinator of the Regional Latin American and Caribbean Programme for Small and Medium-Sized Enterprises (SELA-SMEs Programme). Permanent Secretariat of the Latin American and Caribbean Economic System (SELA).
- Ms Sandra Phillips, Ambassador of Barbados in Venezuela
- Ms Jacqueline Emmanuel-Flood, Chief Executive Officer, Saint Lucia Trade Export Promotion Agency (TEPA)
- Ms Virginia Paul, Head of Trade Policy Unit. Organization of Eastern Caribbean States (OECS) Commission

**SPEECH BY ANTONIO LEONE DURANTE, COORDINATOR OF THE SELA-SMEs PROGRAMME
OF THE PERMANENT SECRETARIAT OF THE LATIN AMERICAN AND CARIBBEAN ECONOMIC
SYSTEM (SELA), AT THE OPENING SESSION**

Honourable Emma Hypolite, Minister of Commerce, Business Development and Investment of the Government of Saint Lucia;

Mr Rodinal Soomer, Head of the Economic Development Policy Unit of the Organization of Eastern Caribbean States (OECS) Commission;

Her Excellency Ambassador of Barbados in Venezuela, Sandra Phillips;

Dear participants,

On behalf of the Permanent Secretary of SELA, Ambassador Roberto Guarnieri, we would like to express our sincere appreciation and extend a warm welcome to this seminar. I am pleased to participate in the opening session of this Seminar on the Fashion and Garment Industry and Economic Development in the Caribbean, which SELA was delighted to organize in collaboration with the Organization of Eastern Caribbean States (OECS) Commission, as well with the Ministry of Commerce, Business Development and Investment of the Government of Saint Lucia and the Saint Lucia's Trade Export Promotion Agency (TEPA.)

The Latin American and Caribbean Economic System (SELA) is a regional intergovernmental organization established in 1975; thus, it will be celebrating 40 years of existence in October. SELA is based in Caracas, Venezuela, and has 27 Latin American and Caribbean Member States. The main objective of this organization is to promote consultation and coordination among its Member States for the participation of the Latin American and Caribbean region as a block in international forums or economies of the world. It also aims to foster cooperation for the promotion of integration and the economic and social well-being of our countries.

In this regard, it should be noted that one of the most important programmes developed by SELA since the end of 1990s is related to the improvement of conditions for the promotion of small and medium-sized enterprises, which are the cornerstone of the economy, employment and well-being of Latin American and Caribbean countries..

The textile industry has always been a very active sector in the global economy. In particular, the fashion design industry has recorded US\$ 1.7 trillion in 2012, employing about 75 million people worldwide.

During the "Seminar on the Apparel Industry and Economic Development in the Caribbean", held in Bridgetown, Barbados, participants analyzed the problems faced by the SMEs sector in the Caribbean, particularly those micro-enterprises working in the fashion and apparel sectors, identifying several niches with a high potential for these Caribbean businesses to develop (clothes for men and women, wedding dresses, accessories and upholstery). In addition, the Seminar also examined the increased activity of this sector in our region and other regions, particularly in African markets, which has rapidly emerged within the textile industry and has attracted several international high fashion brands to different countries of the region.

Among the main conclusions and recommendations of the Seminar held in Barbados, experts and representatives pointed to the need to promote the development of a fashion industry with potential for global marketing; change strategies in terms of the use and adoption of the sectoral method to reposition the sector with a key focus on the capacity of designers and manufacturers to create partnerships; and design a single identity for selling brands. Furthermore, they made a

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recommendation to promote the establishment of national associations and a regional association of fashion designers.

The objectives of this activity are as follows:

- i) Raise awareness of the importance of strengthening sectors with potential for development; in this case, the textile sector, as a mechanism for economic growth and employment generation;
- ii) Increase awareness of the importance of value chains in the Caribbean, in order to facilitate goods manufacturing opportunities, knowledge sharing and access to textiles and raw materials;
- iii) Review successful programmes for implementation of activities related to the fashion industry;
- iv) Promote the creation of a network of institutions and experts related to the industry in order to exchange the best practices implemented in other regions and enable the sector to access international markets.
- v) Foster and strengthen training of personnel in the design and manufacturing of products related to the fashion industry.

Finally, I would like to reiterate our appreciation to the collaborating organizations in the conduction of this activity, and to the speakers and all of you, dear participants, for attending to this invitation, which ensures that both presentations and proposals emerging during these days will help design new activities that lead to the development of the insertion of micro, small and medium-sized enterprises into regional markets.

Thank you very much.

A N N E X I I I

**SPEECH BY RODINALD SOMMER, HEAD OF THE ECONOMIC DEVELOPMENT POLICY UNIT
OF THE ORGANIZATION OF EASTERN CARIBBEAN STATES (OECS) COMMISSION,
AT THE OPENING SESSION**

On behalf of the OECS Director General, I bring you fraternal greetings and best wishes for a successful seminar.

The OECS Commission is deeply honoured to be co-hosting this Regional Seminar on the Fashion and Garment Industry in the Caribbean. We would like to thank the Latin American and Caribbean Economic System (SELA) for agreeing to bring this Seminar to the OECS in 2015 and for their expressions of solidarity and support to our fledgling fashion and garment industry. We would also like to thank the St. Lucia Trade Export Promotion Agency (TEPA) for their partnership as a conference sponsor and for their overall support in ensuring that our region was able to host this very prestigious meeting.

We are extremely pleased that this seminar is taking place at this time in the evolution and growth of the OECS. We recently celebrated our 34th anniversary on June 18th, 2015, and it is now almost four and a half years since the Revised Treaty of Basseterre Establishing the OECS Economic Union entered into force. We believe that the time is ripe for our entrepreneurs to start reaping the benefits of economies of scale that attend the establishment of the OECS single economic and financial space. And to a great extent we are here to discuss and agree today and tomorrow on how public and private sector actors in the fashion and textile industry can collaborate more closely to take advantage of business opportunities in regional and global markets.

Some of the work in the fashion sector that will be considered during this seminar is part of the broader private sector development programme being spearheaded by the OECS Competitive Business Unit (CBU) based in Dominica. The OECS CBU is charged with the responsibility of leading our efforts at building the competitiveness of national and regional enterprises in targeted sectors within the framework of the OECS Growth and Development Strategy, in particular the creative industries. This regional strategy, which sets out a broad framework for mobilization of resources and the brokering of partnerships around new or underexploited opportunities in the regional economy, identifies the creative industries sector including music/entertainment, audio-visual/film, fashion and handicraft, as having a significant role to play in the medium to long strategy for renewed economic and social development in the OECS.

We understand that SELA hosted a highly successful seminar in Barbados in 2014, and regards this year's seminar as part of the continuation of efforts at the repositioning of the fashion sector to take advantage of the tremendous growth in the global fashion and garment industry. The 2014 seminar at which the OECS was represented concluded that there is a dire need in this region to promote the development of a fashion industry with the potential for global market reach, and to develop strategies and approaches for regional designers and manufacturers to create partnerships and to develop national and regional brands to drive sales in the global fashion marketplace.

As a result of our participation in the 2014 SELA seminar, the OECS Commission through the CBU undertook a major study of the sector in all Member States. That study and the continuing work programme which is part of the 10th European Development Fund Regional Integration and Trade for the OECS Project, identified some of the major challenges affecting the sector, and identified areas of opportunity and growth that can be leveraged to resuscitate the sector in OECS Member States. The study identified a high level of creativity and skills among the over 80 SMEs interviewed, and revealed the enormous interest by focal governmental agencies working within the sector. However, the reality points to the need for increased activity in order to stimulate sector-wide approaches that are comprehensive enough to serve as a viable platform to meaningfully engage the attention of stakeholders.

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In that regard, the OECS fashion sector is still largely underdeveloped, thereby hindering economic agents in the sector from being truly competitive in the global marketplace. OECS countries are not visible enough in the overall industry, largely because the region is not involved in the various components of the value chain from raw material production through to the distribution of the finished product.

It has been noted that In the absence of a Caribbean/OECS aesthetic¹, fashion products from the region are constrained to compete with overseas designs, which offer considerable product differentiation and high value-added in an international context. Therefore, the current structure in which the fashion sector operates in the OECS hinders growth and development. Significant shifts will be required to overcome various challenges such as insufficient knowledge of the business of fashion, external markets, value chains, a lack of training in technical skills, a lack of institutional support, among other areas of deficiency.

It is therefore crucial that we in the OECS allocate more of our resources and efforts to capacity building, especially to build a solid core of designers and other players who can come up with design concepts that reflect the region's strong and vibrant cultural heritage, its fascinating world of colour, the creative potency of its environment and of its people, as critical elements in the development of an OECS brand identity.

The fashion industry in many of the OECS Member States has been affected by severe challenges and setbacks for decades. In fact, the sector has seen major declines in labour force engagement, low economic contributions to national economies and generally has been at its lowest levels of performance since the 1980s. Among the critical issues facing the sector include problems of working capital, high utility costs, lack of a skilled labour force, difficulties in sourcing supplies and raw materials, competition from imported goods especially from China, as well as the absence of an effective e-commerce platform to support new areas of product development and marketing.

In response to these challenges it is imperative that the sector be better supported and given the requisite levels of attention for it to become more viable. Among the key strategic options are the assessment of product mix and client base, research and development, the nurturing of creative outlets especially among designers, effective marketing and brand development and greater capacity-building and development.

The OECS Commission is therefore extremely pleased that we will be able at this seminar to review the findings of the recently-conducted OECS sector study, and to find creative ways to engage SMEs in the OECS region on the next stage in the development of this important programme of work. This will enable us to work more strategically with enterprises as well as with national and regional partners like TEPA and SELA that are active in the field.

This regional seminar offers us a unique opportunity to examine the OECS' current status and potential as a player in the global fashion and garment market. It also allows us the opportunity to agree on workable approaches to engaging the key players in efforts at building their competitiveness to be able to penetrate markets which we are now unable to because of existing weaknesses in our strategies to produce products of sufficiently high quality. We hope that participants will be prepared to explore the wide range of possibilities for regional cooperation especially in areas such as training and capacity building, resource mobilisation, joint brand

¹ Fashion entrepreneur, Richard Young of Trinidad and Tobago, has been an advocate of a Caribbean aesthetic for decades.

development and marketing, and joint procurement of raw materials needed to produce high quality fashion products.

The OECS Commission commits to putting all the resources, both human and technical, at its disposal to assist in advancing this regional agenda and to support our enterprises to take on the myriad challenges that currently impact their abilities to be world-class. We are assured given the tremendous goodwill of SELA and other regional partners, and the keen interest of our own enterprises, business development and export promotion agencies, that we are entering a critical next phase for a successful re-engagement to position OECS and Caribbean fashion to its rightful place in the global marketplace. This regional seminar promises to be a vital step in that direction.

**SPEECH BY HON. EMMA HYPOLITE, MINISTER OF COMMERCE, BUSINESS DEVELOPMENT
AND INVESTMENT OF THE GOVERNMENT OF SAINT LUCIA, AT THE OPENING SESSION**

Dr. Didacus Jules, Director General, OECS Secretariat

Mr Antonio Leone Durante, Co-ordinator of the Regional Latin American and Caribbean Programme for Small and Medium Sized Enterprises (SELA-SME's Programme)

Dear participants,

Ladies and gentlemen, I welcome all of you here today, and for those of you who have travelled across the seas to be with us, I extend a very warm welcome to you to our beautiful island. The Government of Saint Lucia is proud to host this "Seminar on the Apparel Industry and Economic Development in the Caribbean". It is no secret that the talent that graces our islands is world class, and can compete with that of any other international icon within the fashion industry, worldwide. We are known not only for our talent within the industry, but also for the Sea Island Cotton produced by some of our sister islands, which attracts good prices and importantly, creates clothing that is sought after by fashion gurus and moguls all over the world.

However, we very well aware of all the challenges that plague us amidst this wealth of talent. These difficulties that we face are largely as a result of the fact that we are not on level playing field with the fashion capitals of the world; - those who have economies of scale within their reach, huge work forces, access to cheap labour and materials; those very things that create a competitive advantage for the international community, and leave us at the short end of the yard stick.

We are thankful however, for friends like SELA and OECS-CBU, who through their own work programmes, have developed this fashion seminar so that we as one body (the OECS region), we can highlight and address the problems that we face, and share ideas on how to overcome them. Most importantly, through your support, we would be in a better position to identify our strengths in this service sector, which is a powerhouse of the world economy.

If we look back at Barbados' experience, we see it as being a prime example of what we have lost to the more developed countries. Barbados' once thriving apparel industry of the 70's and 80's is now overshadowed by imports of the very same items that they once produced. Sea Island cotton, produced in the Caribbean, is the raw material used to produce one of the most expensive fabrics in the world. But our inability to create the fabric, and hence the final product, has hindered us from enjoying its economic benefits.

What we have recognized, is that within our own territories most of us have set up Agencies or Business Support Organizations (BSOs) for creative industries, however, the Apparel Industry seems to be an orphaned child, with often very little resources earmarked for its advancement. We are thankful though that we are seeing some change now, some growth, some hope. In Saint Lucia we boast the "Hot Couture" fashion show which has become a staple on the calendar of the world renowned Saint Lucia Jazz and Arts Festival. However, greater effort must be made to embrace all aspects of the Apparel Industry under the Creative Industries umbrella as we have embraced entertainment and theatre. Importantly, there needs to be greater collaboration between the Government Agencies that focus on the tourism product, and those that are focused on the commercial facets of this industry.

As policy makers, we must ensure that we nurture the design aspect of the apparel industry. Perfecting the design and apparel making art can only come with professional tutelage in the right climate. We must invest in and nurture our talent if we are to grow this industry. At the secondary and tertiary educational institutions, there is a need for the inclusion of fashion on the syllabus;

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and we must have courses tutored by professionals to encourage those who are so inclined to enter this dynamic field.

In addition, we need to pay closer attention to the service value chain of the Fashion Industry, as this can certainly assist with igniting the economies of our various countries. One perennial blunder made by fashion designers, and even some BSO's, is not having a clear distinction between the business side and services side of fashion. Fashion and Apparel professionals, especially in our part of the region, take on far too much responsibility in their businesses. There is a deep-rooted culture of 'wanting to do everything on your own', that we need to cause a paradigm shift away from. We need to work on developing a mind-set of our people that builds trust, and fosters greater collaboration between all players within the industry. It is imperative that we understand that we must allow marketers to market, book-keepers to keep the books, and designers to design. If you have the talent of a designer, it is pointless that you focus your time on manufacturing or marketing, as you easily dilute your efforts at making money at what you do best.

In closing, I would like to quote from the Background article of this Seminar "The textile industry has always been a very active sector in the global economy. In particular, the fashion design industry has recorded an increase of US\$ 1.7 trillion in 2012, employing about 75 million people worldwide". As a nation, a community, an Organization, we must ensure that we secure our piece of the fashion pie, that our people are recognized for their brilliance in design, and that the OECS brand is built on the foundation of our creativity. But this foundation must be rooted at the national level. One cannot regionalize any system without a base – and that base must be at the country level.

Ladies and gentleman, all of this hope within the fashion and garment sector that I have spoken of this morning would be meaningless, and impossible to realize, if we do not pay attention to building sound business structures and models within the industry. Here in Saint Lucia, I am pleased to note that my Ministry, in collaboration with the Ministry responsible for Creative Industries, is moving ahead steadfastly with an important initiative to establish a Fashion Design Council. Through this Council, we intend to bring all the players along the value chain together, to build this industry in a sustainable, collaborative manner; - because it is only when we can come together as a people, under a structured framework, that we can compete with this big world out there.

Again, I would like to thank the OECS and SELA for organizing this event, which is so opportune for us, considering our own national efforts at this time. And so, I urge all the participants to engage deeply in the discussions over the next two days, and have a very fruitful session.

Thank you.

A N N E X V

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SP/SFGIEDC/Di No. 2-15	Speech by Mr Rodinald Soomer, Head of the Economic Development Policy Unit of the Organization of Eastern Caribbean States (OECS) Commission, at the Opening Session
SP/SFGIEDC/Di No. 3-15	Speech by Hon. Emma Hypolite, Minister of Commerce, Business Development and Investment of the Government of Saint Lucia, at the Opening Session
SP/SFGIEDC/Di No. 4-15	Prospects for Fashion and Garment Industry in the economic development of the Caribbean Nora Blake, Technical Officer and Special Advisor of the Ministry of Industry, Investment and Commerce (MIIC) of Jamaica
SP/SFGIEDC/Di No. 5-15	Foster and strengthen training of personnel in the design and manufacture of products related to the fashion industry Marion Stekkel-Vroom, Chair of Women in Business Group of the Suriname Business Forum (SBF)
SP/SFGIEDC/Di No. 6-15	Prospects for the Fashion and Garment Industry in the Economic Development of the Caribbean. Public Policy Recommendations to support the Fashion and Garment Industry in the Caribbean Glenda Joseph-Dennis, Member of the Board of Directors of the National Entrepreneurship Development Company Limited (NEDCO) of the Ministry of Labour and Small and Micro Enterprise of Trinidad and Tobago

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SP/SFGIEDC/Di No. 7-15	<p>Factors to strengthen value chain in fashion sector: CREATIVE 2020. The Guadeloupe Experience</p> <p>Teddy Isimat-Mirin, Stratégies Caraïbes of Guadeloupe</p>
SP/SFGIEDC/Di No. 8-15	<p>Positioning The Caribbean To Win: Penetrating The International Fashion Market</p> <p>Liza Miller, Director General of Estuary PR Limited and Executive Director of Kaj Designs Limited, of Trinidad and Tobago</p>
SP/SFGIEDC/Di No. 9-15	<p>Regional Validation Meeting on the Fashion and Garment Industry in the OECS. Presentation of the OECS Fashion Industry Assessment Report</p> <p>Michele N. Reis, Consultant/Researcher on Migration and Diaspora issues of Trinidad and Tobago</p>
SP/SFGIEDC/Di No. 10-15	<p>Prospects for Fashion and Garment Industry in the Economic Development of the Caribbean. Public policy recommendations to support the fashion and garment industry in the Caribbean</p> <p>Charlotte Tanis, Designer and Owner of Your Size Tailoring Shop in Haiti</p>
SP/SFGIEDC/Di No. 11-15	<p>Promoting economic development in the Fashion and Garment Industry: Factors to strengthen cluster formation and value chains</p> <p>Dav-Ernán Kowlessar, Business Development Associate Consultant of the Caribbean Association of Industry and Commerce (CAIC),</p>
SP/SFGIEDC/Di No. 12-15	List of Participants
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