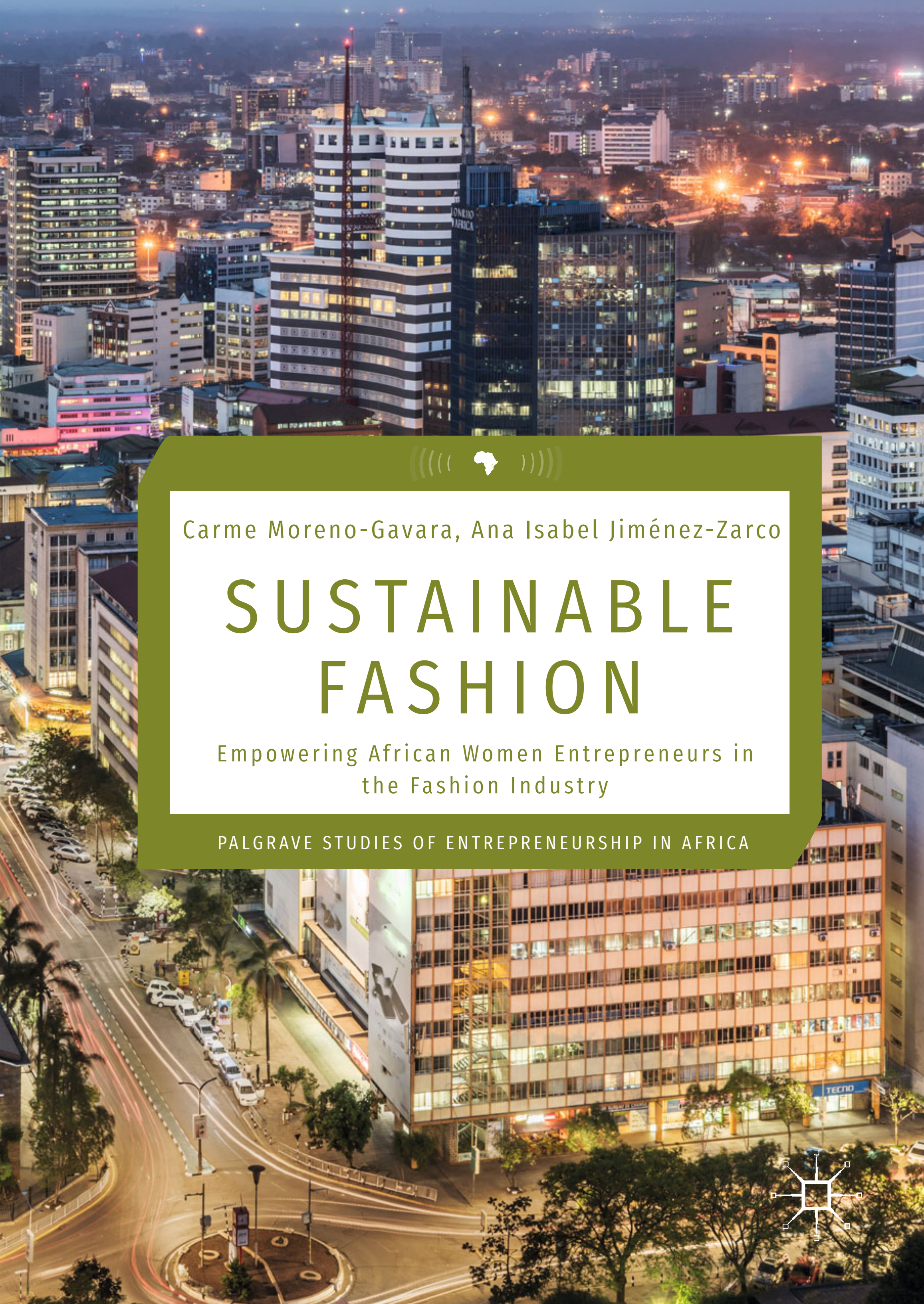

Carme Moreno-Gavara, Ana Isabel Jiménez-Zarco

SUSTAINABLE FASHION

Empowering African Women Entrepreneurs in the Fashion Industry

PALGRAVE STUDIES OF ENTREPRENEURSHIP IN AFRICA

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CHAPTER 1

Introduction

Carme Moreno-Gavara and Ana Isabel Jiménez-Zarco

The present work addresses three issues in the future development of the African continent: sustainability, women's entrepreneurship and the fashion industry. If, taken separately, the management of these three elements is a strategic issue, treated together they create a high impact on Africa at economic, social and environmental levels.

Since the year 2000, the African continent has demonstrated strong economic growth. In particular, some poorer countries have shown growth rates much higher than those of developed countries, in some cases exceeding 6% annually. The pattern of development followed, however, is not efficient enough to guarantee progress or economic and social stability in the medium and long term. Africa, based on the exploitation of its raw materials and the development of labor-intensive activities—and not on knowledge—has become a vital source of resources to be exploited by developed countries. In the short term, this

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model guarantees economic growth, but in the long term it is neither sustainable nor inclusive.

As well as the risk of depletion of raw materials, African countries face high rates of youth unemployment, especially among women. According to a report by the International Labor Organization (ILO), the participation of women in the labor market is 16.6 points lower than that of men. Women mainly have low qualifications, are poorly paid and occupy precarious positions in sectors such as manufacturing. Although supranational organizations, such as the UN and the World Bank, have highlighted the need for a change in the development model, it is the social agents of the affected countries—governments, companies and society in general—who need to undertake structural change such that the model of development is sustainable in all dimensions.

The strong attraction of African fashion for international markets has led to this sector showing high potential for development in some countries. Its importance may even be such that the fashion industry may be regarded as a potential driver of growth. It is true that critical investments by international companies in the sector have favored the appearance of a local industry that directly or indirectly depends on them. And although the activities developed are of low added value, for some local communities it has been the turning point in their fight against poverty and marginalization.

For the future, these countries have to consolidate a local fashion industry capable of generating a "drag" effect on other economic sectors. The strategic model of this industry needs rethinking, with investment in the creation of products with high added value. The use of sustainable raw materials, the development of energy-efficient and non-polluting production processes, and improved working conditions will all contribute.

Women represent about 80% of the total workforce employed by the fashion industry. However, their precarious situation is one of the main obstacles to growth. In Africa, gender inequality goes far beyond just lower wages and difficulty obtaining positions of responsibility or resources such as funding or training. In some countries, to be a woman means to be a second-class citizen with no rights (of either recognition or consideration), and living in extreme poverty. In many families, these women are the only source of income and are solely responsible for households of children.

Training in competences for life and the empowerment of women through female entrepreneurship are emerging as solutions to this situation. In particular, the creation of a small fashion business is a route taken today by many women that enables them to escape the complex personal, family and social situations in which they find themselves.

Many examples of African female entrepreneurship can be found that are contributing to the creation of a nascent local fashion textile industry. The growth of female entrepreneurship in some African countries is encouraging the development of growing business networks where women occupy a central place.

The environment will be a determining factor in the entrepreneurial process, as it influences the model of entrepreneurship for women. Threats and opportunities will be determined by factors such as legal regulations, access to finance and the existence of an industrial fabric. Even the natural resources and cultural traditions of the territory will contribute to determine the future of the project. This is particularly relevant for sustainable fashion where the area's natural resources, as well as the know-how gleaned from cultural traditions, could be the differential element of the product offer. Differentiation is critical for the success of a product. In the field of fashion, the use of natural fabrics and original designs is one of the latest trends. Whether it is creating products for big brands or selling products under their own brand, directly through conventional and unconventional commercial channels, the development of a sustainable-fashion industrial fabric offers significant opportunities for women entrepreneurs.

The in-depth analysis of this topic is organized in this work as follows.

Chapter 2 by Renato Botti, "Fashion sector Outsourcing to Some African Countries: Taking Advantage of Low-Cost Labor?", analyzes how globalization has affected the fashion industry over time. The ecosystem of fashion, the different agents it contains and the relationships between them are studied in depth. The chapter ends by exploring the main challenges facing the sector.

Chapter 3, "Sustainability in Global Value-Chain Management: The Source of Competitive Advantage in the Fashion Sector", is by Ana Isabel Jiménez-Zarco, Carme Moreno-Gavara and Jean Claude Stone Njomkap. The chapter looks at the concept of value, and how consumers perceive sustainability as increasing the value of fashion products. It then examines how companies create value along the value chain, and what type of structures they develop to achieve it. Finally, the fundamental role that local suppliers from African countries can play in this value creation through sustainable raw materials and processes is described.

Chapter 4 is by Miriam Aziz, Charbel Salloum and Laurice Alexandre-Leclair and is entitled "The Fashion Industry in Africa: A Global Vision of the Sector". This chapter provides an overview of Africa's fashion industry, examining the differences between the regions of North and South Africa. It reviews challenges and opportunities for the fashion industry, and the significance of level of development, type of product, and ability to achieve environmental, social and economic sustainability.

In Chapter 5, "Female Entrepreneurship in the African Fashion Industry: A Review of its Determinants and Characteristics", Hashim Sabo Bello reviews the role of women, especially young women, in entrepreneurship in the fashion sector, and defines some of the features that characterize them on a personal level.

Chapter 6, "Challenges and Opportunities for Women Entrepreneurs", is by Ana Isabel Jiménez-Zarco, Carme Moreno-Gavara, and Sheriff A. O. Alabi. It shows how women entrepreneurs in Africa generate significant benefits for their countries economically, socially and environmentally. They continue, however, to face significant cultural, social and legal barriers to the entrepreneurial process. The support of governments, institutions, and local and international companies will be vital to the development of entrepreneurial initiatives among women in the sustainable fashion sector and above all, to the consolidation over time of empowering business activities that provide equality for women.

In Chapter 7, "Case studies from Africa", Bamidele Wale-Oshinowo, Sorbarikor Lebura, Nejla Yacoub and Laurice Alexandre-Leclair present case studies from Ghana, Kenya, Nigeria and Tunisia where, in recent years, women entrepreneurs have been consolidating a strong position in the sustainable fashion industry.

Finally, Chapter 8 by Carme Moreno-Gavara and Ana Isabel Jiménez-Zarco brings together the main conclusions of this volume. In general terms, despite the existing difficulties, female entrepreneurship offers significant opportunities, not only for this group but also, at an economic and social level, for the whole territory. The use of the territory's natural resources increases the attractiveness of a developing industrial network led by women. Now it only remains for local and international organizations to understand the situation, and put in place the measures required for its further development.

CHAPTER 2

Fashion Sector Outsourcing to African Countries: Taking Advantage of Low-Cost Labor?

Renato Botti

1 Introduction

If any sector has understood the need to listen, adapt and capitalize on trends, that sector has been fashion. These needs can currently be regarded as the industry's DNA, the *raison d'être* of its companies' mission, and the central element in its business strategy.

Companies are living in a dynamic environment where: (a) new standards of production are emerging; (b) sectoral boundaries are blurred; and (c) technology acts as both an accelerator and facilitator of the development of the sector, at the same time constituting a channel for information, communication, and dialog between the companies and their clients, and offering infinite possibilities of advancement to the sector. A revolution is taking place in the relationship of consumers with the world's companies, and in their position in a value chain that is increasingly an interconnected, ultra-fast and sophisticated network.

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If its future is to be guaranteed, the fashion sector has to demonstrate its proactivity and anticipate change. So, from a strategic point of view, understanding the consumer both as an individual and from a societal point of view is critical. At the individual level, based on the decisions made by consumers, companies need to identify the specific concerns that, one way or another, drive their purchasing decisions or improve their engagement with the brand. From the societal point of view, the understanding of consumers' needs and impulses has to be applied to the commercial cycle, with the advantage of all the opportunities that this new paradigm offers to the industry. Understanding consumer trends and picking the right time and place to apply them to the value chain is one of the greatest challenges that the fashion ecosystem will face in the coming years.

Despite its glamour, it could be said the fashion sector is as old as humanity itself. Studies date the birth of textiles to about 100,000 years ago, and they continue to be an essential cog in the world economy today. The global fashion industry is worth US$3000 billion or 2% of the world's Gross Domestic Product (GDP).[1] Despite its strength and size, the visibility of this industry is not as high as that of other sectors such as banking or telecommunications.

The structure of the sector is complex, ranging from large retailers to wholesalers, through an infinity of self-employed individuals and micro-enterprises, serving a wide range of markets from luxury to low-cost. Fast and sophisticated, it encompasses a large number of professions and requires highly specialized talent training to serve an increasingly complex client base.

On the other hand, it is a sector that is highly influenced by the social environment, where a high stakeholder group has the capacity to affect companies' future. It is also characterized by globalization, which results in companies having a presence in a large number of markets, makes different agents and elements affect the business strategy, and has led to an increase in both the number of actors and their ability to influence. Indeed, the advent of globalization has been seen as a force that could revolutionize the fashion industry, especially categories such as textiles and clothing.

[1] Data https://fashionunited.com/global-fashion-industry-statistics.

Table 1 Distribution of total value in the fashion sector

Category	*Value (billions of US$)*
Luxury goods	339.4
Menswear	402
Womenswear	621
Bridal	57
Childrenswear	186
Sports footwear	90.4

Source FashionUnited

It is also a sector with a plurality of product categories (such as textiles, footwear and accessories) and services, as well as a complex value chain comprising expert companies in one or more phases, and a great diversity of distribution channels. All this requires specialist knowledge to understand the investment and improvement opportunities. Table 1 shows the distribution of the sector's combined value.

From the consumer's point of view, over time new positions have emerged around fashion that are increasingly complex and ambiguous, products of the individualism, multidimensionality and multiculturalism that characterize the new mass society. Fashion trends, social movements, preferences and tastes are influenced by an unconscious and mysterious amalgam of social factors that are increasingly difficult to decipher. Other factors to be considered are the personal and social mechanisms of perceiving relationships, drawing similarities, finding patterns, provoking desires and generating expectations.

From the industry point of view, there is an increase in outsourcing activities. The economic theory behind this idea was simple: labor could be exported to other countries, such as developing countries, which offer cheaper labor, and this would result in fewer jobs for domestic artisans and workers. However, the reality has reshaped the fashion industry in different ways. First, strategically: providers, producers, retailers and consumers recognize no borders, and since their value chains are international, they need to act in an integrated way, involving information and processes on a global scale. There are also social, political and environmental effects. The old roles change, new actors appear in the industry, and social and consumption trends born at international level demand of companies not only ethical and responsible behavior but also high added value, exclusive products that demonstrate economic, social and environmental sustainability.

This last idea is central to this chapter's analysis of the phenomenon of the globalization of the fashion industry, and of how leading companies in the sector have opted to outsource an essential part of their activities to third countries, mainly in Africa and South-east Asia. We will examine the situation in Africa, one of the largest suppliers of raw materials and labor in the clothing and textile industries, and analyze the factors that determine the competitiveness of Africa compared to other regions.

We conclude that European collaboration with Africa needs to be rethought. A common misconception is that wages are the most critical factor when it comes to determining a potential location for the outsourcing of labor. We argue that this is not the case and identify several other important determining factors.

2 The Fashion Industry: Evolution and Present Situation

From a historical point of view, the globalization that the fashion sector has experienced is not a response to a single event but is the result of a combination of events that have taken place over time.

2.1 The Evolution of the Fashion Industry: The Four Revolutions

The main features of the first and second industrial revolutions in the nineteenth and early twentieth centuries were the use of coal and iron for industry in 1780–1850 and later, from 1850 to 1914, the steel and electricity revolution.

The first industrial revolution had a direct connection with the fashion industry because some of the principal inventions enabled development kand improvement of new fashion concepts. Fashion ceases to be a privilege for the upper classes, mainly because the introduction of new machines for the construction of clothing—sewing machines, power looms and weaving machines—as well as new dye formulas and other inventions increase the speed and ease of clothing manufacture (Pendergast and Pendergast 2004). Changing tastes create a new sense of fashion in the general population. Fashion is close to people and becomes a status symbol (Montagna 1981). According to Frings (2005), the industrial revolution brought social changes including improved working conditions, as well as an improvement in the economic conditions of families. A middle class emerges that spends money on products of the fashion industry.

The second industrial revolution at the turn of the twentieth century was a phase of rapid industrialization with an increase in technological inventions (Rifkin 2014). Mechanization of the industry improves workers' efficiency and productivity. Automation allows textile factories to hire an unskilled workforce to perform repetitive and straightforward tasks under the direction of skilled staff, so they can hire a cheaper workforce, reducing production costs and lowering the prices of the products (Pacheco 2012).

Fashion consolidates as a way of life, and the marketing function begins to assume some importance as part of the business strategy. Communication and retailing are intensively used to make a wide variety of products available to customers—mainly clothes, shoes and other accessories. Fashion shows become authentic shows, window dressing is introduced in haute couture and jewelry, while catalogs are popularized for customers. At the same time, in the field of distribution, luxury brands begin to open establishments abroad, and other companies start to use intensive distribution systems such as department stores.

Intensive technological development is the cause of the so-called third industrial revolution. Large-scale production, together with the creation of new commercial systems, consolidates the *prêt-à-porter* phenomenon. Fashion, once a product only accessible to those with high incomes, is democratized. To expand their markets, companies in the sector begin to apply marketing strategies aimed at strengthening the commercial brand, or expanding and diversifying its product portfolio. Thus companies opt for (a) concentric diversification of their offer, marketing textiles, accessories, perfumes and underwear, or (b) creating product lines adapted to different customer segments according to age, gender or lifestyle.

In the 1990s, when globalization of the sector begins, the fashion industry is concentrated mainly in Europe and North America. Three phenomena foster this development. First is the development of a strong fashion industry in countries such as Japan, China and South Africa, where local fashion brands become relevant internationally and begin to open outlets in large fashionable centers like London, Paris, New York or Barcelona.

Second, the big fashion companies—mainly from Europe and the USA—begin to outsource some of their activities, including the supply of raw materials and production. By subcontracting activity to local suppliers or directly relocating production plants, companies in the fashion industry move their activities into developing countries. As a result, some African and South-east Asian countries become suppliers of raw materials, while beginning to build a manufacturing industry for large European companies.

Third, the development of the internet and social networks, popularized on a global scale among both people and fashion companies, modifies the concept of the market up to the current moment. On one hand, it constitutes a channel through which large amounts of information can be accessed quickly and economically by people using a wide range of technological devices. On the other hand, it offers a new environment where companies and consumers from any part of the planet can talk and interact unimpeded by temporal and spatial barriers. Fashion companies take advantage of digital technology to strengthen their presence in the daily lives of potential consumers. This is the beginning of the fourth industrial revolution where the application of technology throughout the company is the key to the business process.

Smart machines, logistics systems and production facilities allow peerless ICT-based integration for vertically integrated and networked manufacturing. As Fernhaber et al. (2014) show, "the industry 4.0 is the new smart industry, where it is possible to control the whole production cycle, including the distribution and logistics. Having such integrated and networked processes, the companies can combine different core productions to assemble one product." This new concept makes companies in the fashion sector much more cost and time efficient (Hinks 2015). They can easily develop a global value chain, where the value production process that used to be centralized is now decentralized and delocalized by intelligent interaction among all the members of the chain.

2.2 Effects of Globalization on the Industry and the Fashion Market

Globalization is widely debated by scholars, practitioners and policy-makers alike. For this reason it is often defined differently by different people, be they politicians, economists or businessmen (Manolic· and Roman 2013; Morris and Barnes 2008).

2.2.1 The Globalization Phenomenon

While there is no universally agreed definition of globalization, economists typically use the term to refer to international integration in commodity, capital and labor markets (Bordo and Flandreau 2003). Along the same lines, Castells (1999) offers us a formal definition of this concept, describing it as "an economic, technological, social and cultural process on a planetary scale that consists of the growing communication and interdependence between the different countries of the world, uniting their markets, societies and cultures, through a series of social, economic and political transformations that give them a global character".

The main forces driving global integration have been technological innovations, broader political changes and economic policies. Chief among technological innovations were inventions that improved the speed of transportation and communications and lowered their costs. The other dramatic change was the revolution in information and communications technology. New products such as the microprocessor, the personal computer and the cellphone have contributed to profound socio-political and economic transformation. Less noted in the globalization literature are changes in production methods which created new tradable products (such as plastics), expanded global production in food (the green revolution) or made production more efficient (just-in-time methods). Economic policy has resulted in deregulation and the reduction or elimination of restrictions on international trade and financial transactions.

In 2010, Martel analyzed the literature on globalization, concluding that there are four great theoretical approaches to the analysis of this economic, social and political phenomenon (Martell 2010). The first wave is focused on the idea of globalization as an *economic transformation* giving rise to a single global capitalist market economy (Bieler et al. 2006). The second presents a skeptical vision and *disputes the reality* of globalization as a structural change. In this approach, globalization does not exist, and nations still have the power to influence the effects of this phenomenon and can counteract its effects by creating regional alliances based on shared interests (Weiss 2006; Hobson and Ramesh 2002). The third approach shows the *geographical impact* of globalization. Authors such as Giddens (2002) and Castells (1996, 1998) consider globalization essentially in terms of geographical transformation and uphold the role of cosmopolitan democracy in dealing with its economic, political and social effects (Phillips 2005a, b). All three approaches explain globalization in terms of structural change, and all consider the role of ideas and subjective reflexivity in shaping social reality and influencing agents' actions. Thus, people's behavior is defined as a function of their location in the structural context, and material interests are the main drivers of human behavior (Berry 2011).

Finally, the fourth perspective conceives globalization as a set of ideas produced by certain economic and political actors to *justify or legitimate change*. These ideas provide cognitive frames through which to interpret social reality and define what is economically and politically acceptable in terms of public policies. The core concept of this perspective is the existence of a post-national economy represented by three different domains: the offshore and global economy; the national economy, subservient to the first as states become competitive in serving the global economy; and the peripheral economy of the socially excluded, which must be re-established in order to participate in the competition. According to Cameron and Palan (2004), globalization prescribes a new role for the state as an exclusively economic actor subject to economic logic, rather than being capable of shaping the economy from an independent perspective, and relating to its citizens only in economic terms.

According to the last vision, globalization's impact can be observed in the economic, political, social and cultural aspects of society. On the positive side, the global opening of markets promotes free circulation of goods and money, as well as other worldwide services. In this sense, Dehkordi et al. (2011) show that nowadays geographical boundaries between countries do not act as barriers to communication and transport between them. Also, many individuals, enterprises and states stand to gain from this process. They will enjoy global offers of goods, services, capital and manpower, and ultimately, a higher standard of living. Hamdi points out that globalization has created a network system where all countries can easily interact and trade with each other. Similarly, Campos and Canavares (2007) argue that globalization increase the interdependence between countries, people and world organizations, which interact in an economic, sociological and political way; thus a local event in a specific country may have impacts in other parts of the world.

Yet, globalization is not always considered a positive. According to WTO (2017), in recent years there has been growing concern and discontent surrounding the issue of globalization. People feel exposed to and threatened by a process over which they have no influence, and fear being sacrificed in a global competition that is beyond their comprehension. Also, developing countries dread lagging even further behind the developed countries as a result of having to combat international duties and other trade barriers, and consequently being excluded from global growth.

In sum, the process of globalization implies opportunities and risks. The question is not how to stop or avoid it, but rather how to take full advantage of its benefits, while working to minimize its adverse effects.

2.2.2 Effects of Globalization on the Industry and the Fashion Market

Since the early 1980s, transnational corporations, and information and communications technologies have spawned a web of tightly linked networks that cover the globe. Taken together, these forces have profoundly restructured the world economy, global culture and individual daily lives. Nowhere are these changes more dramatic than in the ways that fashion is produced, marketed, sold, bought, worn and thrown away.

Among the multiple effects that globalization has had on the fashion world, some are strategic in nature and others are of a socio-economic and environmental character. Among the strategic are:

- Relocation of the activity (Elden 2005). Fashion brands outsource part of their activities and seek production in different countries because of the price of specific labor or raw materials (Campos and Canavezes 2007).
- Creation of globally integrated value chains.
- Strong strategic dependence on ICT. The communications technology revolution is crucial in this process. With the emergence of the internet and Web 2.0, distances shortened significantly, and information could be instantaneously transmitted (Peña-López 2015). In the field of fashion, this translates into fast access to information about favorite brands through different types of social media and buying online through e-commerce and m-commerce (mobile-commerce).

Among the socio-economic and environmental effects are:

- Loss of employment in the European and USA textile and clothing industries. In the four-year period 1999–2002, employment in the European Union (EU) declined in fashion-related industries by 18% for clothing and 10% for textiles (Taplin 2006). This situation had dramatic social impacts: in Europe, the industry employed a considerable number of low-skilled women who suddenly faced unemployment and who had no other immediate skills to offer to other sectors. In the African and Asian developing countries, workers gained immediate employment in the sector, but in poor conditions (Fox and Sekkel 2008).

- Creation of low-skilled, low-paid jobs, mainly for women in developing countries.
- Over-exploitation of natural resources, environmental degradation and pollution in developing countries. According to Perry (2018), the fashion industry is the second most polluting industry in the world. About 20% of global water pollution comes exclusively from the treatment and dying of tissues. It also consumes more water than most, and contributes one of the most CO_2 emissions to the atmosphere.

In this sense, in the fashion industry, the more prosperous nations can easily be identified as the providers of creativity and knowledge, while the developing countries are the producers and are responsible for assembling the products with the cheaper workforce. Fashion brands seek production in different countries because of the price of specific labor (Campos and Canavezes 2007). But this inequality goes beyond the wages imbalance to include cultural and educational dominance. It can also be perceived in social and environmental conditions. It is true that the use of raw materials and the location of production plants offer some economic opportunities to some developing countries. However, it should be noted that the employment created by this industry, especially that derived from the textiles and clothing subsector, is a low-skilled and poorly paid job. The consequences can also be observed at the environmental level through the exploitation of natural resources such as diamonds and precious stones in the Democratic Republic of the Congo, Botswana or South Africa, or organic cotton in Burkina Faso, Chad or Mali.

Consumers can also observe these differences. In Western countries, consumers can access through multiple channels—physical and online—a wide range of products and fashion brands sold by large retailers who can update the inventory, make transnational commercial deals and coordinate distribution (Masson et al. 2007). Sometimes, the brand is more important than the product. Consumers find a form of self-expression in brands and buy what brands mean to them: exclusivity, power, freedom, sympathy, and so on. But as fashion images are transmitted through fashion magazines, music videos, film, television and social networks, a global style is also created (Kaiser et al. 1999) that extends across borders and cultures. Asian, African and Western fashion systems share styles and raw materials. Large commercial centers in rich countries harbor all these styles under one roof and cater to consumers of all ages, genders, ethnicities, professions and subcultures.

Today's fashion marketplace is highly competitive, and the constant need to 'refresh' product ranges means that there is an inevitable move by many retailers to extend the number of 'seasons', that is, the frequency with which the entire merchandise within a store is changed. According to Christopher et al. (2004), fashion markets typically exhibit the following characteristics:

1. Short life-cycles—the product is often ephemeral, designed to capture the mood of the moment. Consequently, the period in which it will be saleable is likely to be very short and seasonal, measured in months or even weeks.
2. High volatility—demand for these products is rarely stable or linear. It may be influenced by the vagaries of weather, films or even by pop stars and footballers.
3. Low predictability—because of the volatility of demand, forecasting even total demand within a period with any accuracy is complex, let alone week-by-week or item-by-item demand.
4. High impulse purchasing—many buying decisions by consumers for these products are made at the point of purchase. In other words, when confronted with the product the shopper is stimulated to buy it, hence the critical need for "availability".

2.2.3 The Global Environment and the Stakeholders of the Fashion Industry

Traditionally, the fashion sector has shown high dependence on the economic, social and cultural context. The economic situation and socio-cultural market trends affect the products produced and the way they are marketed. And currently, this situation is much more acute due to globalization.

This means that multiple agents more or less close to fashion companies are able to affect their future, so we can say that the relationship that a company has with these stakeholders is key to its success. As we shall see in Chapter 3, the creation of value for all those involved in the operation of the company is fundamental to creating a common goal and addressing the complex problems and challenges they face. The growth of these companies and their durability is influenced by and linked to the relationships they maintain with different interest groups, which change over time, as does the strategic importance of each of them.

One way to classify the interest groups is based on their degree of proximity. Each group has a different capacity to influence the company, and therefore, the relationship that must be maintained with each group must be changed. Among the main groups are:

a. *Shareholders.* The growing professionalization of the sector has led to the emergence of large business groups and the transformation of family businesses. Being in a globalized market, we must face the possibility of offering products all over the world and seeking foreign investment. It is essential to look after the shareholders and potential investors of companies.
b. *Employees.* Society requires greater flexibility, and hence company policies facilitating a healthy work–life balance. In a sector with high turnover, there is the challenge of retaining talent, caring for employees and involving them in the vision, mission and values of the company.
c. *Suppliers and distributors.* We live in an era of convenience and seek high quality and speed. The ethics and control of production processes are taking on increasing importance. These two aspects are of key importance in the future of the company as they are directly involved in the process of creating value for the client. Their joint integration in the value chain will be critical to the success of the business.
d. *Public administration*. This seeks to meet the needs of companies and consumers through programs and policies. It also helps with the growth and expansion of companies, informs and educates consumers, facilitates management and leads to more equitable and sustainable social development through fashion.
e. *Media*. It is necessary to invest in new technologies, the use of social networks and other actors such as bloggers, influencers, "Instagramers" or "YouTubers". Communication channels between the company and the consumer have changed and the control of information is no longer exclusive to the companies.
f. *Consumers.* In this era of hyper-information and greater awareness, being able to buy when, where and how you want is one of the new rules imposed by the consumer. Omni-channel has become the

new standard. It requires a good shopping service, whichever channel is chosen, and companies have to orient themselves towards all channels.

2.3 Today's Global Fashion Ecosystem

Fashion is today one of the world's largest and most fragmented industries, divided into multiple subsectors, segments and categories, housed in many different types of organization, and with vast geographical dispersion. However, one of the main characteristics of the sector is the high degree of power concentration that they present. Over the last decade, 20% of fashion companies created 100% of economic profit, while during the same time the bottom 20% of companies went backwards, losing market share. Thus, brands such as Adidas, Chow Tai Fook, H&M and Inditex, among others, increased their profits by 8% over the period 2000–2010, taking advantage of their stable market position, hammering down costs, investing efficiently and executing better than competitors. On the other side, the losers were midmarket players who struggled in the slow-growth environment of the past five years, experiencing sharp declines in margins and wide variations in operating performance.

Traditionally, big fashion companies have been located mainly in the United States and Europe. They are large companies that mostly produce clothing and accessories, but also have jewelry product lines and even household items. It should be remembered that the textile and apparel subsector represents about 80% of the total activity of the fashion sector (FASH455 2018).

2.3.1 The European Union Fashion Industry

The EU is one of the most critical players in the fashion industry worldwide. In 2016, the total turnover of the industry in the EU was almost €164 billion, while investment rose from €4.329 billion in 2015 to €4.446 billion the very next year. It is a very active entrepreneurial sector, with a total of 177,700 companies with over 1,670,000 employees in 2016 (European Apparel and Textile Confederation, n.d.). Table 2 presents the sector's main economic trends within the EU.

However, the fashion industry in Europe also imports primary materials such as raw yarn, cotton and silk; other materials such as fabric, denim and printed textiles can be shipped at the secondary stage; and processed

Table 2 Companies and jobs in the EU

EU-28	*Companies*		*Jobs*	
	2015	*2016*	*2015*	*2016*
	Number		*Number*	
Textiles	54,626	55,852	631,327	649,004
Clothing	120,156	121,628	1,036,182	1,021,675
	174,782	177,480	1,667,509	1,670,680

Source Author's compilation from European Apparel and Textile Confederation Key Figures 2016 (2017)

textiles, shirts, trousers and so on can be exported as the final product. Unsurprisingly, textiles and apparel were one of the leading industrial sectors to become increasingly globalized in this region (see Table 2).

With regard to the jobs created, note that the fashion industry employs a large number of European citizens, with close to 400,000 from Italy alone and about 40,000 firms in the country. The trend in Italy is synchronous to that in Romania, Portugal and Poland (see Fig. 1).

An analysis by country shows that it is the textiles and clothing subsector that is the most important within the European fashion industry. Compared with other subsectors such as jewelry, where the number of global operators is deficient and business figures are low, the textile subsector represents about 80% of the total activity of the fashion industry companies. In countries like Italy, this subsector has been growing steadily, and in 2016, its general growth rate was 1.7% (SMI, 2016 based on ISTAT data).

While exports remained positive in 2010–2016, with a peak of 3.8% in 2014, industrial production declined by 1.85% in 2015. The global turnover of the textile and clothing industry was severely hit by the sovereign debt crisis which began in 2012, resulting in a 3.2% drop which continued into 2013, when growth was more subdued at 0.7%. The sector appears to be recovering from the crisis, as testified by the number of companies. Both textile and clothing showed a positive trend in 2016 with a substantial increase in turnover. Exports were somewhat down compared to 2015 but were still strong enough to reach +1.9% in 2016. France and Germany are the most important trading partners for Italy, with a 2016 increase of 1.3 and 2.9%, respectively, in exports

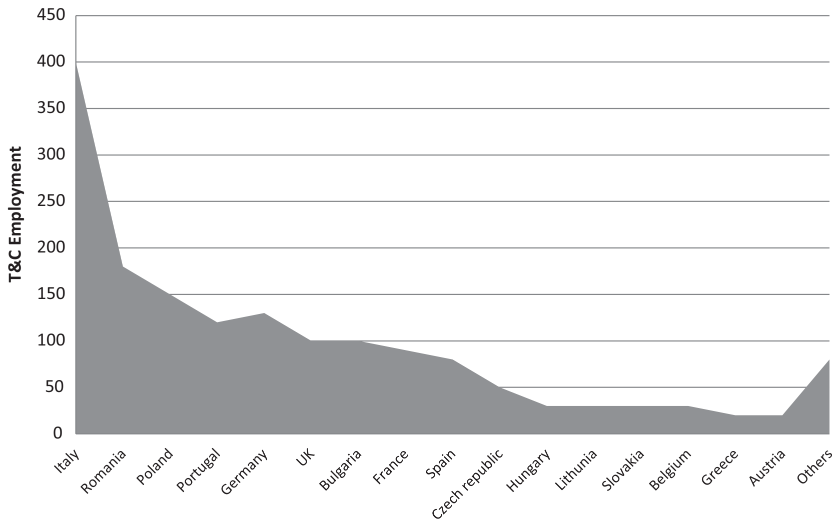

Fig. 1 EU: Fashion industry employment by country (*Source* EURATEX [2016])

to these countries, according to National Institute for Statistics (ISTAT) data, followed by Japan (6.9%), Russia (7.3%), Spain (5.6%) and the UK (3.7%). The main suppliers of goods and services in 2016 remain China (−7.2%), France (3.9%), Spain (12.4%), Germany (2.5%), Turkey (1.1%), Bangladesh (4.4%), Romania (6.0%), India (2.8%), Belgium (5.3%) and Tunisia (−3.8%) (SMI based on ISTAT, data 2016).

In France, the Union des Industries Textiles (UIT 2016) registered 550 active companies in 2015, with 60,000 people were engaged in them. A turnover of €13 million, with exports of €8.8 million was also registered. Leading suppliers included China with €4 million, Italy, Bangladesh, Turkey, India, Germany, Tunisia, Belgium, Portugal and Pakistan. The leading export targets were Italy, Spain, Germany, Belgium, the UK, China, Switzerland, the USA and the Netherlands.

Louis Vuitton Moët Hennessy (LVMH), a French luxury conglomerate, is currently the most significant fashion company worldwide. LVMH's annual revenues reached €42.6 billion in 2017, and the company is valued at around €122 billion. The company operates as a chain of independent stores and shops-in-shops for fashion brands such as

Louis Vuitton, Fendi and Dior. LVMH not only stands for high-end fashion but provides for every aspect of a luxury lifestyle, from champagne (Moët) to sailing yachts (Royal Van Lent).

In Spain, the fashion industry is mainly represented by textile and clothing companies which contribute almost 3% of the GDP and 7% of the country's industrial exports (CITYC 2015). Industrial production in the textile industry increased from 2.5% in 2013 to 5.1% in 2015. However, the clothing sector experienced a fall of about 6.8% in 2015. Industrial employment in textiles and clothing also suffered significant losses due to the crisis. In 2011, employment in the sector was 146,000 which fell to 136,000 in 2012. It dropped further to 128,000 in 2014 only to finally rise in 2015 with 131,000 people employed. Clothing was the main product exported in 2015, with 44% (€6.166 million), followed by knitwear with 28.8% (€3.966 million) and fabrics coming in third at 10.9% (€1.502 million). France continues as one of Spain's primary customers, accounting for 12.6% followed by Italy (9.9%), Portugal (8.5%), Germany (7.0%) and Morocco (6.3%). The leading suppliers in 2015, as in the past, were China (23.1%), Turkey (10.5%), Bangladesh (10.30%), Morocco (7.8%) and Portugal (7.4%) (CITYC 2015).

In the Spanish context, note the importance of Inditex, the fast-fashion company with a market value of nearly US$92 billion, which is the third-largest fashion company worldwide and owns brands like Zara, Pull&Bear, Oyshio, Uterque and Stradivarius. The Spanish division is valued at €75 billion, and its 2017 revenue was €25.34 billion. Inditex has stores in every major city in Europe, which also accounts for the majority of the company's revenue.

2.3.2 The United States Fashion Industry

The USA's estimated market share in the fashion industry is 4%, and its domestic market value around US$385.7 billion. In the United States, an estimated 1.8 million people are employed in the fashion industry, 232,000 of them in manufacturing textiles for apparel and other fashion items (JEC Democratic, Bureau of Labor). Average annual wages in fashion range from US$26,440 for textile bleaching and dyeing machine operators to US$84,600 for marketing and sales managers in fashion. About 79% of all US employees in fashion work for apparel retailers, while a smaller number, 145,000 employees (8% of all employees in fashion), work in apparel wholesale and merchandising. Finally, another 8%

are employed in the apparel manufacturing industry where the average annual wage is US$34,110.

Some of the world's largest fashion companies, such as Nike, are based in the United States. This "athleisure" and lifestyle brand is currently the most significant fashion company globally with annual revenues of US$30.6 billion and a market value of nearly US$105 billion. Ninety percent of its income comes from the Nike brand, and the remaining 10% from the Converse brand. TJX Companies is the second-largest fashion company in the United States and operates in the majority of the country, Canada and Europe. In 2015, its market value was US$54.5 billion and its annual sales US$30.9 billion. VF Corporation and L Brands are the third and fourth largest fashion companies. VF Corporation markets brands belonging to different fashion subsectors, such as Lee, The North Face, Timberland and Napapij. In 2015 VF's annual revenue rose to US$12.4 billion, with most of its revenues coming from the Outdoors and Action Sports division. L Brand is the parent company of Victoria's Secret and most of its US$12.15 billion sales, nearly 93%, are domestic.

3 New Challenges for the Fashion Industry

The fashion industry faced difficult times in 2016 and 2017. However, forecasts by McKinsey (2017a) pointed to the sector recovering in 2018, increasing its growth between 3.5 and 4.5%. However, this same report indicates that the recovery of the sector could be conditional on the capacity of the companies to address certain phenomena that partly derive from the globalization and the technological revolution:

1. Dealing with volatility, uncertainty and shifts in the global economy.
2. Digital revolution and value chain improvement.
3. Change in the client's relationship with the companies.
4. Importance of sustainability as a social trend to be followed by the sector.
5. Outsourcing of activity to developing countries.

In the previous section, we observed the importance of the European and North American fashion companies. Despite this, over the last five years, Chinese companies such as Bosideng (textile and apparel) or Anta Group (sportswear) have increased their presence among the big companies in the fashion sector. The economic figures and analysis of the data show the extent to which the fashion industry is globalized. China, unsurprisingly, is the most significant exporter, especially in the textile subsector with €109 million in 2015, followed by Europe with €20 million, India with €17 million, USA with €14 million and Turkey €11 million (WTO 2015). The situation is almost identical for clothing exporters where, yet again, China ranked first worldwide with €175 million followed by EU, Bangladesh, Vietnam and Hong Kong. Europe continues to be the largest importer of textiles worldwide with €29 million, while the USA imports the highest amount of clothing products with €97 million of consumer goods imported in 2015.

3.1 Volatility and Uncertainty in the Sector

Despite the importance that specific regions are gaining in the fashion sector, it should be noted that this is highly volatile and uncertain. Globalization continues to be a reality in the fashion sector, mainly due to digital connectivity and the flow of data, and this will lead to much greater global connectedness.

With cross-border bandwidth rising exponentially throughout the last decade, data flow now accounts for a larger share of the impact on GDP than the global trade in goods. Both businesses and consumers are responsible for this connectivity. According to McKinsey (2017a), a significant portion of this global flow of data is intra-company traffic. This includes making transactions, tracking information, and communicating internally and with suppliers, service providers and consumers. Individuals, too, are playing an essential role in this new digital globalization. As Lyly-Yrjanaine (2017) shows, it is estimated that consumers will be spending US$1 trillion on cross-border e-commerce by 2020, and more than 900 million people have international connections on social media. The social media networks have created an online ecosystem that has built user bases the size of country populations.

This growing global connectedness is driving up the competitive intensity in the fashion industry. Companies cannot maintain their advantage if it is only supported by assets such as physical distribution infrastructure to proprietary systems for cross-border communication. Day by day more fashion companies will take advantage of opportunities to enter new markets, as connectivity allows for access to customers worldwide. This is especially true for start-ups created by younger fashion entrepreneurs entering new markets without establishing a significant physical presence, reaching global scale and becoming "micro-multinationals". But established companies can also simplify existing global operations and internal communications through virtual connectivity and improved systems for accessing information in real time. Technology offers the company access to customers worldwide—especially those in new segments or fast-growth markets. But they can also put into practice new digital collaboration models with their foreign suppliers, and service providers can improve transparency and efficiency. Finally, companies will be able to tap into global ideas, trends and talent pools faster and more efficiently, from crowdsourcing innovation ideas online to virtually connecting with creative or other talents from the other side of the globe.

3.2 Digital Revolution and Value Chain Improvement

Besides all the possibilities that technology brings to the business, is also important to think about the challenges that it presents to companies in the fashion sector. In the digital context, companies have seen the intensive use of ICT, and the significant changes caused by it, internally and externally.

Recently, digitalization and internet platforms have penetrated all areas of society and promise to follow the same path in the future. It is this that will allow companies to remain competitive in a globalized market, thanks to the application of more efficient processes, the reduction of time to market and arrival at the market at the right time.

The fashion industry has begun to incorporate new disruptive technologies such as artificial intelligence, big data, the internet of things (IoT), robotics, augmented reality, 3D printing or autonomous vehicles. The implementation of these technologies covers the entire value chain of companies, from the creative process, the design or manufacture of the product, to improvements in the quality of the service provided to the consumer. Thus, applied directly to their internal processes, companies achieve improvements in terms of speed, flexibility, and cost and quality of the service offered on the one hand, and provide a higher degree of happiness, satisfaction and well-being through new vital experiences for consumers on the other.

3.2.1 Big Data and Artificial Intelligence

Big data refers to the large volume of data that can be obtained and analyzed to create market intelligence. The analysis of the data produces ideas that lead to better decisions and strategic business movements.

Currently, companies in the fashion retail sector usually use big data and other tools to analyze the behaviors and purchasing habits of consumers. Access to consumer data allows companies to design their business strategies around personalized offers according to the type of customer, as they know the products that consumers have bought in the past and what they are buying now, and are able to predict and those products or needs they will have in the future.

The evolution of computers has made the machines show a certain degree of intelligence. Some programs and algorithms learn from experience, like humans, and can make judgments and decisions. Their main application to the fashion sector offers benefits that extend along the entire value chain, increasing the speed of processes or improving cost and flexibility (McKinsey 2017b). Examples can be found in companies such as Amazon or IBM, which have specific software enabling clothing design based on image design and collecting trend data. Another use of artificial intelligence is in the field of marketing, where the engagement of brand buyers can be redefined, their tastes precisely ascertained and the purchase process facilitated.

3.2.2 Internet of Things and 3D Printing

In the fashion industry the IoT, the connection to the internet of devices and objects for daily use, translates into digitally connected clothing, footwear and accessories that allow users, for example, to know how to wash clothes properly, find a specific type of product, and so on. The incorporation of sensors allows companies to understand the movements and interactions of consumers in physical stores and to offer them customized content according to their tastes and preferences.

More and more companies are using 3D printing to develop more comfortable, flexible and resilient products. Both designs and materials used can have a positive impact on society by enabling the use of environmentally friendly materials and reducing waste. It is a technology that can modify the business model of companies in the sector that will adopt small-scale production and demand. Great designers like Iris Van Herpen or Noa Raviv have used this technology to create their collections as it allows them to offer unique and complex garments in addition to footwear, handbags, accessories and fashion accessories.

3.3 The Changing Client–Comapany Relationship

Technology has changed not only consumers' behavior, but also the relationship they maintain with fashion companies.

The network is not only a source of information but also a channel through which the increasingly demanding and informed consumer can communicate and interact with organizations. They can access vast amounts of information about the different brands available, make comparisons between them and even purchase the same product from suppliers in different countries, enabling them to make greater demands on companies regarding both transaction and product value.

Technology offers its users increased power. Individuals—whether or not they are consumers—can express their opinions or describe their experiences with a product or brand through the network. This information has a global reach and can be consulted by any other individual, organization or entity at any time and from any place. But above all, it has a high credibility level and is highly influential in the behavior of a brand's potential consumers. Here take place the omni-chanel.

Today's companies require a social media presence. This means that an interaction can be made 24 hours a day, 365 days a year, obliging the business to be ready online nonstop. Omni-channel shopping offers consumers the opportunity of alternating online and offline channels during the purchase process, integrating the two channels to provide a comparable experience. In the fashion industry, the emergence of a new circular customer journey has boosted investment by companies in the sector to offer an omni-channel experience.

Companies seeking to be successful in this context must know how to evolve to the rhythm of the client and also: (1) have qualified, multicultural and creative human teams; (2) be innovative and continuously renew the product offer; and (3) be highly sensitive to cultural changes and consumer trends. Currently, the fashion industry revolves around the customer and it is in the understanding of the consumer that the success of companies lies. The increasingly empowered and informed consumer can choose the best option in the market. Companies, therefore, need to study and understand thoroughly the consumer, their role in the market, and their motivation, thought processes and lifestyle beyond the needs of the business. Such an analysis of customers' needs can lead to new ideas, products and services, and eventually to new strategies.

Companies can use social media not only to market their products but also to strengthen the brand image, facilitate its communication and promote bi-directionality with customers. They can find out what consumers are thinking, generate engagement and even boost sales. Finally, companies also have to consider the importance that mobile devices have acquired during the purchase process. Many fashion product customers show mixed purchase behavior—ROPO or DOROPO—so that part of their purchase process is done from mobile devices. ACOTEX (2015) points out that 33% of sales in fashion e-commerce are made from mobile devices, or that sales from these devices already account for about 3% of fashion companies' total sales. Note also that 16% of consumers also use a mobile device in the physical store.

McKinsey (2017a) points out that among the drivers of the fashion industry is customization and the demand for unique and differentiated products, with consumers increasingly seeking to express their style, image and values through fashion. Mass use of social networks, especially by the younger generation, is relevant to this search for authenticity. Companies are using personalization as a differentiation strategy, offering consumers opportunities for design, ranging from small adaptations to products designed almost entirely by them.

3.4 Following Sustainability as a Social Trend

Another factor for companies to take into account is the emotional aspect of marketing, where they seek to establish links with customers, connecting with their lifestyle through the brand and the values it represents. Here again social networks play a fundamental role. One of the main effects of connectivity between users through the internet and social networks is the dissemination of social trends that arise as a result of large-scale economic, social and technological change. These trends influence purchasing behavior and may require companies to make changes to their strategy.

"Trend" refers to an inclination, propensity or orientation towards certain ends or directions that affects the behavior of various social agents. Some trends have not only had a significant impact on the behavior of consumers, but have also promoted a change in the business model of organizations, transforming the reality of the fashion sector. Among the most important currently is the sustainable movement, which promotes responsible consumption, and the demand for sustainable products. Consumers want to see a level of freshness in their products and in the whole shopping experience. Increasingly, consumers value companies that transparently develop activities, processes and products that are socially, economically and environmentally sustainable.

However, traditionally the fashion industry has not developed practices related to sustainability. The large companies in the sector have opted for the creation of brands whose value lies in exclusivity, design, quality or luxury. They have also chosen to relocate part of their supply and production activities for economic reasons. Since the middle of the last decade, outsourcing has become a common practice among these companies. Many have experienced an increase in production costs as a result of increased salary, energy and raw material costs. The search for new sources of raw material, as well as territories with external suppliers that allow them to carry out this productive activity, has directed their attention to some African countries. Other companies, however, have opted for offshoring practices, moving their production plant to places, where the same products can be produced in the same way, but with cheaper labor, lower taxes, subsidized energy and lower healthcare costs (Friedman 2005).

3.5 Outsourcing the Activity

It was not till the present decade that companies in the fashion sector found that relocating their productive activity offered the opportunity not only of maintaining their quality standards at a lower cost, but also of responding to market demands for sustainable manufacture and products with high value added (quality, design, etc.).

Sustainability has become a differentiating element among companies in the fashion sector (De Brito et al. 2008), especially when an essential part of their potential market is in the Asia-Pacific, Latin American or Central African regions. The megacity phenomenon has led to two-thirds of the world's population being concentrated in emerging markets, causing large companies in the fashion sector to rethink their expansion strategy and seek to strengthen their presence in these markets by developing part of their activity in them.

According to Bartlett and Beamish (2018) growth is being driven by emerging markets both in terms of the supply of raw materials and production, and in terms of the increase in consumers. This is particularly noteworthy in some geographical regions, such as Africa and South-east Asia—principally India and China—which are becoming the world's manufacturing centers, and where local brands and retailers are growing, and alongside them local-for-local production bases as well as regional trade networks. Thus, companies can access high-quality raw materials that are also cultivated and obtained by traditional methods, ensuring the environmental sustainability of the process. And if manufacturing takes place in depressed areas, the companies contribute to the development of the area, guaranteeing its economic and social sustainability.

4 The Outsourcing Strategy: Africa, the World's Major Supplier

As pointed out by other scholars (Keane and Velde 2008), fashion has represented itself as an essential kick-starter to the growth prospects of developing countries. One of the key developments in these countries' prospects noted by Young (1991) is that developing countries have been participating in global value chains in order to 'learn by doing', which allows them to take full advantage of the international knowledge spillovers.

China has become the most prominent economy for the import and export of fashion products. Historically, China has been one of the biggest players in the global value chain. Much of this is owed to the dual benefits of economies of scale and a competitive advantage in the same fashion subsectors, especially in textiles and clothing. Cheaper supply of labor and raw materials has allowed mass production at lower average cost. But this competitive advantage has been gradually fading due to rising wage costs, especially in Southern China (Keane and Velde 2008), as well as the high economic and temporal costs of sending the product to Europe.

The World Trade Organization confirms that in recent years, Africa has become one of the prominent destinations for the outsourcing of fashion companies. International fashion companies have been investing with the objectives of both servicing local and regional markets, and leveraging the continent as a global delivery hub. Keane and Velde (2008) show how some fashion subsectors, especially textiles and clothing, have received their highest share of exports from developing countries such as Mali, Somalia and Tunisia.

For large companies, the main attraction of Africa lies in its geographic proximity to Europe, which guarantees a reduction in the delivery times of the finished products, as well as a reduction in taxes and shipping costs. Labor costs are also low, and political and social stability and the consolidation of such economies as Nigeria and South Africa has influenced a significant number of companies in the sector to move part of their productive activities to these countries.

Many governments, understanding the significant economic advantages of becoming an outsourcing location of choice, encourage measures that favor foreign investment and the use of local services in the country. For example, the Ghanaian and Kenyan governments are not only promoting the outsourcing industry through tax breaks and infrastructure development, but have themselves become users of outsourcing services, increasing credibility and creating demand essential for continued growth in the industry.

In recent years significant progress has been made in tapping the huge potential of Africa. Infrastructure improvements and lower bandwidth costs have nurtured the growing outsourcing industry. Investment by global outsourcers in the region, and the sizable market in this low-cost location with a young population and a regional market with sizable demand for goods and services, are important factors on the road to further expansion of outsourcing in Africa.

Finally, the EU is playing an essential role in fostering a favorable ecosystem and important cooperation between Africa and Mediterranean countries by partnering African corporations with EU companies. Among these initiatives is the European Neighborhood Policy (ENP), established in 2004, which aimed to consolidate partnership, mutual interest and co-ownership between the enlarged EU and its neighbors. Under this initiative, almost €12 billion in grants were invested in fostering the textiles and clothing value chain project and in collaborations with Mediterranean regions through integrated projects for the fashion sector.

5 Africa's Competitiveness

The African continent was touted to be the next hub of industrial and sustained growth back in the 1990s when the World Economic Forum first produced its Africa Competitiveness Report. While the report is now biennial, the story of Africa has progressed. Slow GDP growth coupled with an expanding working-age population that by some predictions is expected to grow and expand until 2035 (UNDESA 2015) is the engine of progress for the continent.

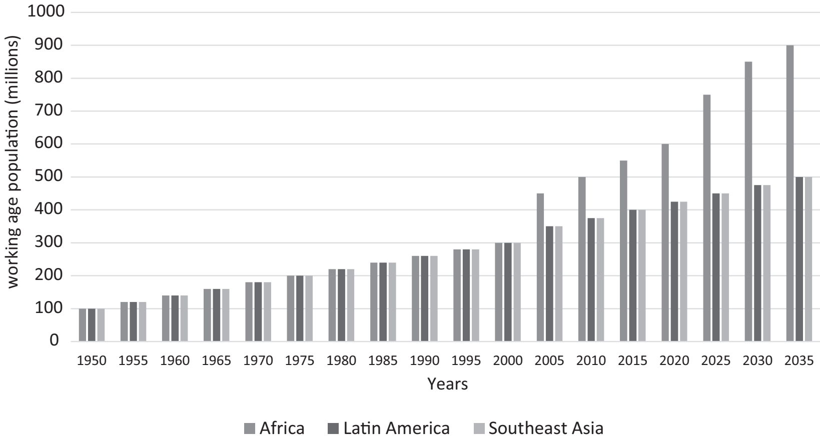

Fig. 2 Working-age population (*Source* Africa Competitiveness Report [2017] Figure 1 [modified])

This working-age population, however, can only be an asset if there is enough employment. In this context, textiles and clothing play a very significant role. Let us take a look at the facts first.

The working-age populations (historical and predicted) of Africa, Latin America and South-east Asia are presented in Fig. 2, which reveals a couple of key trends. The working population in Africa is projected to rise to 900 million by the start of 2035, as opposed to Latin America and South-east Asia, the two most labor-abundant regions in the world as of today. The other noticeable trend is that Africa had already matched the pace of growth in the working-age population in these two regions back in 2005. And from then on, it has only surged forward. The potential for clothing production in Africa is massive due to the labor-intensive nature of the industry. Figure 2 indicates the sheer size of working-age population in the African continent, which is almost equal to the entire working-age population of South-east Asia and Latin America put together. The Global Competitiveness Index (GCI) for Africa, the EU and the USA, published by the World Economic Forum and estimated on various dimensions, is shown in Table 3.

The GCI is a scored on a scale of 1–7, with 1 being poorest and 7 being strongest. Africa has been competitive in terms of institutions,

Table 3 Global competitiveness index: Africa vs. Europe and USA

Dimensions	*Africa median*	*European Union*	*USA*
Institutions	3.8	4.5	5.3
Infrastructure	2.8	5	6.0
Macroeconomic environment	4.2	5.3	4.5
Health and education	4.6	5.5	6.3
Higher education and training	3	5.2	6.1
Goods market efficiency	4	4.8	5.5
Labor market efficiency	4.2	4.5	5.6
Financial market development	3.5	4.3	5.7
Technological readiness	2.8	5.8	6.2
Market size	2.9	4.1	6.9
Business sophistication	3.5	4.6	5.8
Innovation	3.1	4.1	5.8

Source Global Competitiveness Report 2017–2018

macroeconomic environment, health and education, goods market efficiency and labor market efficiency.

This makes it an ideal hub for clothing production as it satisfies all the requirements regarding labor, institutions and stability. However, a common concern for most international organizations is the fact that this improvement and growth is very uneven across the countries in the region when compared with global benchmarks.

By some measures, many African nations can compare with the OECD average (for example, labor market or merchandise advertisement proficiency), yet no African country achieves the target when it comes to the stable execution in the framework, advanced education, innovative status or development that are presented by the USA the median EU countries. While these areas are particularly relevant to the cause of sustained growth, it begs the question as to whether there is a need for mediation in areas where it is required the most.

The continent seems to lack the will to execute the necessary changes. A quick look at the adaptation of Africa to its GCI parameters is a good measure of the integrity of this claim. Surprisingly, Africa has been a frontrunner in the areas that were championed by the Millennium Development Goals, such as education, infant mortality and maternal health. For instance, the African continent has improved its performance on well-being and essential education by over 12% over the past decade (Africa Competitiveness Report 2017).

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CHAPTER 3

Sustainability in Global Value-Chain Management: The Source of Competitive Advantage in the Fashion Sector

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1 Introduction

Value is today a crucial aspect of market success for fashion companies. The products and services they offer are consumer focused and seek to maximize the value offered to customers, by satisfying as many of their needs as possible (Vargo and Lusch 2004). However, value is what the consumer perceives, in that the same product offers different value

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depending on the consumption situation and on the individual profile, needs or behavior of the consumer. The benefits and characteristics according to which the individual defines the product's value are different, and can also change over time (Woodruff 1997). Thus some consumers value the design, exclusivity or prestige of the brand, while others value the origin of the raw material or the sustainability practices used by the company during the manufacturing process (Brun et al. 2008).

Companies are aware that value is created throughout the production process; therefore, as Payne et al. (2008) point out, it is a continuous and direct process involving the various agents that make up the value chain. Consequently, the accepted concept in the business management context is currently "value chain" rather than "supply chain". However, globalization trends in the fashion sector have led to relocation of the supply and production process (Brun et al. 2008). A large number of fashion companies have outsourced and transferred part of their production activities to developing countries, especially in the African continent (Dunning and Lundan 2008).

In spite of the cost savings obtained through access to quality raw materials or labor at low cost, managing a broader and more international value chain is difficult. International fashion companies must respond to the demands of increasingly responsible consumers (Caniato et al. 2012) while increasingly relying on their suppliers and sub-suppliers—companies of varying origins, sizes, and corporate cultures (De Brito et al. 2008). The lack of infrastructure or barely qualified personnel can severely damage the management of the chain, when it is seeking to create and add value to the finished product.

New approaches to value-chain management strongly recommend close integration and strong collaboration between all members of the chain, as a way to make the production process more efficient. It is that sharing of information and jointly designing and developing different actions that not only reduces time and costs of the process but also increases the value added to the product throughout the process.

In this context, international companies—as well as buyer companies—must be aware of the benefits that collaboration with local suppliers can bring, not only by improving the production process through training and investment, but also by exploring social and environmental issues of the country in question, in order to improve product sustainability and hence corporate image. It is in the global market, where one of the main attractions for the customer is the sustainability of the product, that a sustainable company can improve its reputation and image.

2 The Concept of Global Value Chains in the Fashion Sector

Today's fashion companies are consumer-centric, meaning that business strategies are designed to satisfy consumers' needs. It is therefore essential to know them and how they value the product. To provide value all agents involved in the production process need to work in a coordinated and collaborative manner.

Fashion companies are specialized in their core business of design and distribution, guaranteeing that an essential part of the product value is efficiently created. But another part of their activities, the supply and production function, can be outsourced to other independent companies or relocated to the company's factories located abroad. To ensure that the value-creation process occurs continuously, the organization needs to exercise a high degree of control over all those activities that traditionally it does not perform. That is why the creation of value does not simply depend on the company having a perfect knowledge of the market and its customers. It is increasingly conditional on the efficient management of the value chain, and thus the type of relationships that the company maintains with the different members that comprise it.

2.1 What Is the Value in Fashion Products?

The concept of value has acquired great relevance in the management of any business, but especially in the fashion industry. From a strategic point of view, value is a critical element of the companies' survival and future success. Companies offer value to their clients through the products, services and ideas in their commercial offer, while clients show a preference for, buy from and are faithful to the offer (understood as a combination of goods and services) that gives them a differential value (Gummerus et al. 2017; Ravald and Grönroos 1996).

The literature states that value is a complex concept, especially when it is analyzed in the context of the relationships between different kinds of agent (Peña et al. 2017; Oliver 2014). However, this analysis allows us to offer a definition: "Value is a perception, the result of the agent's overall assessment of the utility that the relationship brings to him, based on the evaluation of the perceptions of what he receives and what he gives in return" (Jiménez-Zarco et al. 2007; Peña et al. 2017).

In the first instance, the company's ability to create value will depend on the degree of its knowledge of the clients. Companies should first differentiate between consumers—industrial or final—and note that their value perception is entirely different (Payne et al. 2008). The nature of the agent defines the desired benefits and costs, and the importance thereof, thus determining the net balance of this valuation. The economic nature of the companies determines that the benefits sought in the relationship are of an economic, competitive and strategic nature (Aaker 2012; Oliver 2014), while for the end customer, the value offered by a fashion product lies in the utility it provides according to a wide range of different consumer needs (Wu et al. 2014).

The end customer is complex, and not always rational, presenting a variety of needs that have to be met through the acquisition of fashion products. The work of Maslow, though dating back to (1943), still shows how the needs of the consumer can be classified hierarchically according to their nature. According to this model, the basic human needs are located at the bottom of the pyramid. As these needs are met, higher needs and desires appear, which occupy the upper parts of the pyramid. The established hierarchy marks the path that the individual must follow to respond to all their needs. In this way, basic physiological needs are met first. Once these are satisfied, needs relating to security arise, then those to do with affiliation and affection, with recognition and finally with personal self-realization. In this way, a product can satisfy multiple needs: for instance, a garment of a specific brand can range from covering the body or fighting the cold to dressing up to feeling socially accepted, or even personally attractive, given the design, or the type of materials used to make it.

At a strategic level, to manage the value that their products offer, companies must take into account that:

1. Value is a subjective concept, which depends on (a) the importance that the need has for the consumer (Jiménez-Zarco et al. 2007) and (b) the consumer's perception of the product and its ability to respond to their needs. Thus, perceiving higher value in a fashion product increases the consumer's preference for it over competitor products.
2. Value perception is personal. It depends on individual characteristics, time and the circumstances in which people evaluate products (Peña et al. 2017; Shin et al. 2017). This is why the perceived

value is different for each person, and for the same individual the perceived value changes over time, or before a change in the purchasing situation.

3. Both the product's attributes and the services that accompany it increase the perceived value.
4. The same product can satisfy different needs in an individual consumer. At a strategic level, fashion companies note that value is created and incorporated throughout the product creation process. Different agents participate in this process and contribute value thanks to their know-how and collaborative practices. As competition has intensified, companies have realized the importance of coordinating all activities linked to the production process, so that each contributes to the creation and distribution of value for the consumer on an ongoing basis (Llonch 1996).

2.2 Sustainability as a Determinant of Product Value for the Consumer

The ability of the product to meet the different needs of the consumer determines its value. However, over time, as the type of needs that it has been looking to satisfy has changed, so too has the way that people determine its value. In pre-industrial society, demand outstripped supply and the end consumer sought to satisfy their most basic needs. Now, however, the individual's ability to choose different purchasing channels for a large number of products makes them establish value based on products' ability to satisfy needs of a social and personal nature—needs that are located at the top of the pyramid.

Consumer value has a significant influence on consumer decision (Tasci 2016). The more needs that can be met by characteristics of the product, the greater its value, and the greater the likelihood of it being purchased. However, the decisions faced by consumers are complex and diverse, and are not resolved simply by using a single one of various existing criteria such as product function, price, brand, and so on. All the evaluation criteria are required to make the most appropriate choice.

At the end of the last decade, it was clear that existing production and consumption models had been exhausted. The severe damage caused at a social, economic and environmental level showed the need to produce and consume differently, more sustainably. At this point the figure of the responsible consumer emerges, with a social and environmental awareness that leads them to value the product differently by considering the origin of the raw materials, the design, method and place of production, the amount of energy consumed, and so on.

The responsible consumer sees the sustainability of the product as a determining element of its value. Sustainable products are those that allow for the regeneration of raw materials and do not contribute to pollution and toxicity in any form (Fuller 1999). That is, they are products that use materials grown naturally—(without pesticides), use energy-efficient, non-polluting production processes, can be recycled and employ well-remunerated labor.

2.3 The Creation of Value in the Production Process

Over time, the agents that participate in the product creation process change. From the suppliers that supply the raw materials to the distributors who provide the product for the consumer at the point of sale, different areas of the company all contribute to the creation of value. The correct management of these production and sales processes, but above all of the relationships that occur along this chain, called a *value chain*, will depend not only on the survival of the company but also on its future success in the market.

The globalization of the fashion industry means that a significant number of value chain members are geographically separated, forming a global value chain (GVC). As we shall see, this phenomenon has had great importance for the African continent, with a key proportion of international fashion companies establishing their supply chain in African countries. It is proximity to Europe, the presence of a large low-skilled labor force and low wage costs that have made African countries attractive to the large fashion multinationals.

2.4 The Global Chain in the Fashion Industry: From Supply to Complex Value Chain?

According to Matevž et al. (2012) and Kandampully (2003), in today's competitive landscape, individual companies no longer compete in the global marketplace, but "instead, it is networks that compete, and competitive advantage in such a scenario is largely determined by the competitive position of the network to which the firm belongs. This fact is particularly true in international exchanges, such as the fashion sector, where specialization and outsourcing have increased the importance of efficient management of the relationships among the network members" (Nagurney 2010).

Initially, the network is configured as a supply chain, in which all agents—individuals, companies, resources, activities and technology—are involved in the creation and sell products to consumers. Thus their activities range from the delivery of raw materials from supplier to manufacturer, through to delivery to the distributor and finally to the end user (Davenport and Brooks 2004).

However, current consumers buy and are loyal to those products and brands that show their ability to give value. This is especially important in the context of fashion, where social and psychological dimensions determine the individual's purchase of the product, the needs it satisfies and the type of value it provides (Kastanakis 2014). Companies should design strategies to enable all members of the supply chain to participate actively in the process of creating value. The chain thus has broad aims that reach beyond the efficiency of production and delivery processes to the creation and continuous delivery of value for the client. We move from a *supply chain* to a *value chain*.

Companies like Inditex or H&M show a high commitment to sustainability through collaboration with leading international initiatives such as Textile Exchange, the Better Cotton initiative or Organic Cotton Accelerator to promote the use of sustainable raw materials. They also have codes of conduct and compliance programs, strictly enforced with suppliers, regarding the use of both raw materials and sustainable production practices. Thus, to continually improve their supply chain, companies routinely audit and assess suppliers, going to exhaustive lengths to train suppliers and auditors.[1]

Gereffi and Fernandez-Stark (2011) point out that each member of the chain has to participate in the creation of value, in such a way that synergies are generated jointly. According to this idea, the value chain can be defined as the set of all of the people, activities and resources involved in the production of a good or service and its supply, distribution and post-sales activities (Horvath 2001). In other words, the value chain comprises the full range of activities that are required to bring the

[1] As an example visit the Inditex website, https://www.inditex.com/en/our-commitment-to-people/our-suppliers/continuous-improvement.

product from conception through design, raw materials and intermediate inputs, marketing, distribution and support to eventual consumption (Stein and Barron 2017).

Intensive competition in today's global markets has forced international companies to focus on management of their value chains. This is especially relevant in the fashion industry, due to the sector characteristics: short product life-cycles, volatile and unpredictable demand, tremendous product variety, and long, polluting, inflexible production and supply processes (Sen 2008). But advances in ICT and transportation technologies have also motivated the continuous evolution of the value chain and of techniques to manage it effectively.

Years ago, companies' response to customer demand was based on forecasts, with the resultant risk of over- or under-stocking. Value chains were not as complex as they are now; raw materials were provided to one or more factories where items were produced, shipped to warehouses for intermediate storage, and then shipped to retailers or customers. For instance, Turker and Altuntas (2014) show that at the top of the textile and apparel subsector value chain are fiber producers using either natural or man-made (synthetic) materials. Raw fiber is spun, woven or knitted into fabric by the second member of the chain, the textile mills. The third member of the value chain is the apparel manufacturers or the manufacturers of industrial textile products. The final member is the retailers who offer the apparel and other textile products for sale to consumers.

Nowadays, the competitive environment of fashion is more uncertain than ever. Customers' keenness to welcome fashion goods rather than commodities has reduced the fashion product lifecycle. Consumers demand a constant renewal of the supply of fashion products (Amir 2011). Thus, companies in the sector, such as Zara or H&M, have to renew their offerings on a weekly basis with new designs, using new materials, and even expand their portfolio with new lines of complementary products. Further trends have appeared more recently, adding complexity and difficulty to fashion logistics management.

The use of offshoring and outsourcing reduces companies' ability to control specific crucial processes in product value creation, and has led in many cases to significantly longer lead times. While there is usually a substantial cost-reduction advantage to be gained, particularly in manufacturing, the effect on lead times can be severe (Fernie et al. 2010). It is not only distance that causes replenishment lead times to lengthen in global sourcing, but also the delays and variability caused by internal processes at both ends of the chain as well as the import/export procedures in between. The result is longer GVCs with more inventory and the consequent risks of obsolescence that arise (Gustavsson et al. 2011).

3 The Global Value Chain: The Network Structure

Fashion companies are under pressure to seek efficient cost-reducing manufacturing solutions that at the same time improve service levels and increase the value that products offer to their consumers. Some companies, especially in the textile and apparel subsector, have moved to reduce significantly the number of suppliers with whom they do business (Sen 2008). A number of considerations have driven this supply-base rationalization, in particular the need to develop more responsive replenishment systems—something that is not possible when companies are sourcing from many suppliers. Other companies have opted for cooperation, increasing the integration of their chains and creating business network structures (Abbasi et al. 2014).

In 1981 Emerson defined the business network as a set of two or more connected business relationships, in which each exchange takes place between business companies that are conceptualized as collected actors. Connected means the extent to which "exchange in one relation is contingent upon exchange (or non-exchange) in the other relation" (Cook and Emerson 1978). Moreover, as Anderson et al. (1994) showed, two connected relationships that are themselves of interest can be both directly and indirectly connected with other relationships that have some bearing on them, as part of a more extensive business network. In the same vein, Castells (2001) and Gulati (2007) define a business network as the way in which the activity is organized, the strategic and organizational model based on the decentralization in a network of the activities of the company, where cooperation between the members favors the development of an efficient management of the network, with regard to both the processes and activities to be developed, and the relations between the members.

Abbasi et al. (2014) review the use of network design in the value-chain context, and show that these kinds of structures concern complex interrelationships between different chains' agents, such as production centers and distribution centers which are legally separate but in operational terms are linked together by flow of forward materials, and feedback information. It also determines the number, location and capacity of facilities required to meet customer needs effectively.

According to Gunesekaran (1998), companies' survival in a competitive environment of continuous and unpredictable change depends on their capacity to react quickly and effectively to changing markets driven by customer-designed products and services. Thus, efficient network value-chain management should implement processes, tools, and training that enable it to respond quickly to customer needs and unforeseen market changes while still controlling costs and quality (Christopher et al. 2004). Interrelationships between all the entities upstream and downstream of the value chain should be perfectly integrated and managed through creating alliances between entities—information-system integration and process integration—to speed up response to customers, increase product variety and quality, and reduce costs.

Rasheed and Geiger (2001) shows how *efficient value-chain management* delivers major economic benefits to businesses as diverse as computer manufacturers, fashion retailers and construction firms. Benefits include such traditional value-chain functions as inventory control, purchasing and order fulfillment. The effects can also be perceived in other business areas, and can create efficiencies and cost savings across a wide range of business processes. Properly implemented, this strategic system must be conducted across the entire enterprise, from marketing and product design groups all the way through to the accounts receivable department. Further on, it must take place between all the companies, since optimizing entire chains will require a level of information sharing and collaboration among enterprises previously unknown in most businesses.

Collaboration among all members is the key to this new model of value-chain management. Whatever their size, function or relative position, companies cannot improve their operations until they understand the needs and real-time demands of the rest of the chain members (Horvath 2001). The ability to understand and offer a quick response to the changing needs of customers far down the chain produces such strategic benefits as improved project design and more effective marketing. But Hult (2011) shows that it depends not only on the company's competencies but also the way that relationships among the value chain members are managed. This author points out that value-chain management is considered a part of the customer value-creating process that delivers the proposed value to customers (Hult 2011). Higher levels of collaboration and information sharing among the members result in greater integration of the value chain, increasing efficiency and hence the value that the final product offers the consumer.

Sometimes, in response to a strategic need of the company—mainly when it serves several markets—the value chain integrates members from different countries, becoming a GVC. According to Andreff (2009), the use of foreign suppliers by leading companies is not a new practice. It can be traced back several decades, but, it was not until the 1990s that outsourcing and offshoring practices started to define business models. Initially limited to sectors such as textiles, clothing and electronics, a decade later the globalization process was quickly expanding to various industries and involving firms from different countries. This process has been especially intensive in African developing countries, where international companies are increasing their competitive advantage through global sourcing.

3.1 Global Value Chain Benefits to International Fashion Companies

At a macroeconomic level, Nicita et al. (2013a) show how the liberalization of cross-border transactions, the advances in technology and information services, and improvements in transport logistics and services have provided firms with greater incentives to fragment production processes and to delocalize them. Over the last three decades, GVCs have increasingly gained importance in the economies of developing countries, especially those where there is a high amount of unskilled labor, as in African countries.

There are multiple strategic reasons for relocating production processes at the microeconomic level, because the network integrates agents of different geographical origins, and above all, with different organizational cultures that have different and conflicting objectives (Wirtz et al. 2015). The first, and possibly the most important, is that companies are creating truly GVCs that enable them to reduce their costs. From an economic standpoint, the emergence of a GVC is related to the concept of comparative advantage (Hugos 2018). By relocating production processes (i.e., R&D, concept, design, manufacturing, packaging, marketing, distribution, and retailing) to different countries, buyer companies can obtain some advantages due to access to the best available human or physical resources, with the aim of maintaining their competitiveness by augmenting productivity and minimizing costs. Similarly, Hult (2011) notes that outsourcing companies can take advantage of lower production costs, freeing capital from non-core activities and generating large-scale efficiencies. Shipping, communications and tariff-related costs have also fallen over the years. Another reason is companies' need to respond to the uncertainty of today's global and hypercompetitive markets by improving product quality, increasing their product portfolio with new varieties (Mangan et al. 2016) and improving corporate reputation through the development of sustainable practices (Covin and Miller 2014).

In the fashion market, consumers look for innovative, exclusive products that also offer them unique experience (Sorescu et al. 2011) and in this sense, the GVC allows both fashion companies and local suppliers to achieve some competitive advantages. It enables international fashion companies to access new quality raw materials and skilled labor or incorporate some sustainable production methods that, although traditional in other countries, are innovative for them. Meanwhile, for local suppliers, belonging to a global chain not only allows them to access international fashion markets but also to access more innovative knowledge in the fields of production, distribution and sales (Caniato et al. 2012). Participation in a GVC also affects the reputations of the different agents that make it up. Koplin (2005) argues that society holds companies responsible for the environmental and social problems caused by them directly, but also by their suppliers. Thus, the development of environmentally or socially sustainable practices by one member of the value chain benefits the reputation of the others.

Despite their benefits, GVCs demand greater efficiency and competence from international companies and local suppliers alike, with hardly any guarantees of product activity continuity over time. Efficiency and skill are the bases on which the members of the chain build value over time. GVCs are fundamentally a business strategy for international fashion companies and are driven by their own business interest. International companies locate part of their production activity in developing countries that offer low-cost production at the same quality level (Leigh and Blakely 2016). However, this practice is changing, and nowadays low labor costs alone are not sufficient justification for maintaining the production process.

According to Nicita et al. (2013a), GVCs rely on sophisticated and competitive networks of goods and information flow and need a sound business environment that often is lacking in developing countries.

In specific business sectors such as the fashion industry, however, international markets are also increasingly demanding rapid access to a wide range of products with high added value. This is why Europe's international fashion companies are starting to seek: (a) new locations for their production centers geographically closer to their distribution points and (b) new suppliers who can offer, among other things, raw materials access, innovative and sustainable production practices or highly qualified labor—all of which add extra value to the product during the production process (McKinsey 2016).

Waiting time reduction has become a differential element in the fashion industry. International companies therefore value positively the incorporation of geographically close members into their chains. This is especially important in some subsectors of fashion such as textiles, where production in Africa is distributed across different parts of the territory. The greatest concentration of activity in the sector is found in the countries of the north—Morocco, Tunisia and Egypt—thanks above all to orders from major European fashion operators. In sub-Saharan Africa, clothing is focused on Ethiopia and Mauritius; in the south, in South Africa and the two countries it houses in its interior, Lesotho and Swaziland. International fashion companies such as Zara or H&M have moved from searching the African continent for sources of raw materials to incorporating local producers into their value chains—small craft workshops or sewing ateliers created by women—or to establishing production plants in some countries such as Ethiopia. Other subsectors, such as jewelry, have found not only raw materials but also a source of inspiration in Africa. Some of the most important companies in the sector worldwide, such as Cartier or Tous, have begun to collaborate with African designers to produce their collections. Local companies dedicated to the design and manufacture of jewelry, such as Pichulik, have also achieved international fame and market their products in Europe and the USA.

3.2 Global Value-Chain Opportunities and Risks for African Developing Countries

A substantial number of developing-country companies have managed to enter labor-intensive manufacturing segments of the GVC. For them, being part of the chain offers significant development opportunities through their products' access to international markets. For countries newly embarking on an industrialization path, the insertion of their enterprises into GVCs through the relationships forged with foreign investors can provide an entry point onto the global industrial stage (UNCTAD 2007). Joining a GVC enables a country's producers to become more competitive, due to the opportunity to obtain modern management know-how and hands-on information on quality standards and technology (Mwirigi et al. 2016). Finally, local companies learn about consumer preferences and behavior patterns in the high-income markets for which their products are destined.

Moreover, the benefits are also perceived at the local level. Development and consolidation of a continuous productive activity favors the emergence of a complementary industry activity at the local level, enhancing economic and social growth (Cusolito et al. 2016). Such is the case of Ethiopia, where the involvement of H&M or Primark has created employment and generated wealth in the territory. According to the data published by ICEX (2016), the textile sector has consolidated in the country, with exports worth 160 million dollars in 2016 (6% of the total national GDP) and more than 37,000 jobs. Nicita et al. (2013a) show how local companies participating in the GVC can also create economy-wide externalities linked to value creation for both for the company and the developing countries, such as employment, improvements in technology and skills, productive capacity upgrading and more value-added export diversification. As we shall see in Chapter 5, the opportunity to improve the competitiveness of local companies encourages public institutions and governments to support foreign investment in the territory. Of the 130 textile factories in Ethiopia, 37 are foreign owned. Foreign companies are working to improve cotton plantations and develop the rest of the links in the value chain. Currently, the country's cotton production supplies 40% of industrial demand. Among the advantages of the sector are low energy and water costs.

However, the insertion of companies from developing countries into GVCs can be fraught with difficulties. As pointed out by Kaplinsky and Morris (2002), entry into global networks is defined by the rules established by the major international companies in the sector, rather than by the commercial policies of governments. The large retailing or manufacturing companies in the chain that distribute contracts to suppliers in developing countries very often establish parameters such as environmental and labor standards, quality specifications, and process standards.

Another barrier to entry for newcomers lies in whether they can forge relationships with the big buyers in these networks. The leading companies in GVCs may already be relying on an existing network of suppliers. So their interest in incorporating new developing-country suppliers into the value chain may be low if relationships with their current suppliers are based on trust and reputation, because of high transaction costs rather than on competitive considerations such as production costs alone. Transaction costs can matter more than direct production costs, especially in product lines where quality and timely delivery are determining market factors and buyers have to make significant investments to monitor and strengthen the capabilities of their suppliers.

GVCs are often driven by multinational companies that are involved in several global chains. One strategic option for changing this situation is for African countries to position themselves as trusted suppliers or subcontractors of industrial inputs for global industrial networks. There is evidence that Africa's increased dominance is due to increased international production, especially the growing importance of the network of multinational enterprises (Kleinert 2003). For example, trade in intermediate goods has become the most important, with flows approaching 60% of total exports (WTO 2010).

3.3 The Operating Model of the Global Value Chain

According to Gereffi and Memedovic (2003) for the United Nations Industrial Development Organization (2003), industries have responded to globalization by setting up two main operating models: producer-driven and buyer-driven value chains (BDVCs). The producer-driven value chain (PDVC) is typically applied in high capital industries, for instance in hardware—as is the case for Apple—and is characterized by high barriers at the entry level (Gereffi and Memedovic 2003). The volume of investment required, especially as regards technologies and financial capital, hampers the prospects of any new company to easily enter and compete with them in their own market. The global firms operating in a PDVC are thus primarily interested in controlling the suppliers of their key raw materials or component suppliers as the basis of their production.

On the other hand, BDVCs are typically used by low capital-intensive sectors such as consumer goods, and that includes the fashion industry. According to Gereffi and Memedovic (2003), the international companies—retailers, marketers and brands—manufacturing fashion goods in developed countries establish complex strategies and value chains to leverage and use human capital capabilities and raw materials overseas, in particular from developing exporting countries. The buyer-driven value chain is mainly driven by trade opportunities and international commercial agreements.

The BDVC applies to highly labor-intensive sectors, so global firms are compelled to operate overseas to meet manufacturing needs, without their own factories. In this way, the physical production of consumer goods is separated from design, marketing and retail. International brands, especially in the fashion sector, gain their profits mainly from the design and marketing parts of the business, none of which are outsourced, and where investment by the firm is the greatest. Globally, international fashion companies mainly control the product value chain, defining the rules that govern the relationships among the chain members. Hence, when such interaction between producers and consumers has no boundaries, and since value chains are international, firms need to act on a global scale.

3.4 The Relational Linkage Between Buyers and Suppliers

A vital issue in the management of value chains, especially those in which the international company assumes a leadership role, is how the relationships between its members are managed. Narayanan et al. (2015), Griffith and Zhao (2015), and Wowak et al. (2013), among others, have examined the influence of the buyer–supplier relationship on market performance, but few have analyzed the factors that influence this dynamic process of GVC development.

In the real world, a wide spectrum of company–supplier relationships can be found. The sharp fluctuations and disturbances in today's international business environment have caused the GVCs to seek an effective way to deal with undesirable uncertainties—both market and internal—that affect their performance. Value-chain design decisions are the most important strategic-level decisions in value-chain management, concerned as they are with the members of the chain, their complex interrelationships and, consequently, their degree of agility (Abassi et al. 2014).

Agility is defined as the ability to implement the changes necessary to respond to changes in the environment. But in the context of GVC management, the focus is also on improving flexibility and the speed and efficiency of response to changing markets. Agility is a term applied to an organization that has created the processes, tools and training to enable it to respond quickly to customer needs and unforeseen market changes while still controlling costs and quality (Christopher et al. 2004). But it can also be used to explain the practice of—"partnering flexibility", defined as achieving high agility in selecting and switching to partners interchangeably in accordance with market uncertainty and changes in partners' behaviors or competences (Nejatian et al. 2018). According to Hernández-Espallardo et al. (2010), partnering with a single supplier may cause significant inflexibility, in that it limits the possible future options for both companies. Finally, note that agility brings three benefits to the buyer company:

1. It provides strategic alternatives for future decision making.
2. It helps the firm avoid partners' opportunistic behaviors.
3. It promotes higher supplier performance as a result of competition.

But sometimes, although the company may have the flexibility to change suppliers, the costs of doing so can be high. Sometimes, the participation of certain local suppliers in the value chain can provide significant benefits; in other cases, there are other limiting factors limit making it inadvisable for the international fashion company to change suppliers. This capacity will depend on some factors such as the type of relationships that have been established along the chain between the international company and the local supplier (Gopal 2018), the degree of support provided by the leading companies to their suppliers to comply with the established rules, the investments made by local companies to meet the requirements of international companies, or how easy it may be for foreign buyers to access the same supplies elsewhere. For example, African countries that are rich in raw materials such as organic cotton or precious metals and stones are in a better position. Resource-rich African countries can market their exclusive supplies of critical commodities to enter commodity-driven GVCs as a supplier.

The work of Takeishi (2001) and Kotabe et al. (2003) shows how the application of the relational approach to the management of the GVC favors cooperation among members while increasing the degree of chain agility. Collaboration among members is a fundamental element in the relationship. However, as indicate number of authors have shown, the motivation to develop collaborative behaviors may be different and depends on the power of each member and how it is exercised (in other words, the power structure).

Power is recognized as an essential factor in value-chain development and its integration (Matos and Hall 2007; Power 2005). In line with this argument, Maloni and Benton (2000) distinguish two broad categories of power: mediated and non-mediated power. The first represents the competitive and negative uses of power and is shown in the form of reward and coercive power. In contrast, non-mediated power occurs as a natural part of buyer–seller business transactions and does not necessitate intention from the source, such that the suppliers decide whether and how much the leading firm will influence them. The buyer company may not even be aware that non-mediated power exists (Benton and Maloni 2005), while in mediated power the company is aware of this power, and offers financial incentives or directed benefits to its partners, or makes use of its legal, legitimate and sanction rights over partners.

Thus, in the early 1990s Grönroos and Gummersson (Grönroos 1989, 1990a, b, 1995, 1996, 2000; Gummersson 1987, 1991, 1994, 1996, 1998) point out the benefits of voluntary collaboration between the members. These authors show that in industrial markets companies that show a willingness and desire to collaborate closely with other members of the chain improve the efficiency of their processes. Chapman et al. (2002) and Wang et al. (2010) go a step further and propose the need for chain members to integrate their information systems, so that specific logistics functions can be developed in an automated way. On the opposite side Usui et al. (2017) point out that to elicit collaborative behavior from suppliers for developing interfirm competence through relational ties, the leading firm needs to maintain some degree of power over them.

In relational governance, the power is non-mediated, although according to Benton and Maloni (2005), its origin may be of different forms: (a) expert, (b) referent, and (c) legitimate power. Expert power exists when the buyer company holds information or production expertise that the supplier or any other partner company values. Referent power implies that one firm desires identification with another for recognition by association (e.g., being the primary supplier of established global manufacturers). Finally, legitimate power, which includes both inherent and legal forms, is more relational and positive in orientation and implies that the target believes in the right of the source to wield influence.

A robust relational exchange between companies builds more favorable conditions for joint and collaborative competence as well as increasing the speed and the degree of flexibility in the chain, and reducing transaction costs between members. As a result, firms are likely to make long-term relationship-specific investments to maintain a high level of relational governance within the value chain network (Kotabe et al. 2003). Sometimes companies respond to market challenges by developing new products or implementing new production processes. At the strategic level, this new relationship model enables creative innovation, where all GVC members develop an active role (Bakhshi and McVittie 2009).

4 Sustainability and Sustainable Development: A Source of Competitive Advantage for Local Suppliers

Twenty years ago, sustainability was not a general talking point among companies, but right now it has become a differentiating factor by which some companies compete. For other it can be a decisive factor, for example, in raising or retaining capital. But what is sustainability, and even more important (in that case), what does it mean for the companies at the strategic level?

Generally speaking, sustainability looks to protect our natural environment, and human, social and ecological health, while driving innovation and not compromising our way of life. But in business this definition has important strategic implications, both for the company and for all the members of the GVC. In this sense, note that sustainability issues are particularly sensitive for the fashion value chain, given the current fierce competition, intensive resource use and the exposure of penurious labor conditions in some regions.

4.1 The Concept of Sustainability and Sustainable Development

There is no universally agreed definition of what sustainability means. Indeed, there are many different views on what it is and how it can be achieved. But it is true that since the early 1980s there have been a growing number of studies, international reports, statements and agreements concerning the present and future well-being of Planet Earth, and which strongly recommend carrying out human activities in a sustainable manner. Notable among these documents is the Brundtland Report by the World Commission for the Environment and Development (WCED 1987) and the world's first Earth Summit in Rio in 1992.

Molinar et al. (2001) define sustainability as being about designing and organizing human activity in such a way that the complexity and interconnectedness of all systems are taken into account and the survival of any one system is dependent on the health of the others. According to Camagni et al. (1998), sustainability is a term that is associated with a dynamic, evolutionary or adaptive process involving a balance between the natural, economic and social environments (also known as the triple bottom line perspective).

Sustainability is generally concerned with both the health of the planet as a provider of life systems for humanity and the establishment of knowledgeable and empowered societies. It is a future-oriented outlook that emphasizes that the current generation of human beings should leave the Earth to their children in a condition equal to or better than the one they inherited. In this sense, the way to be sustainable is through sustainable development (Savitz 2013).

Kates et al. (2005) and De Brito et al. (2008) define sustainable development as development practices based on sustainability principles which enable the human needs of the present to be met without compromising the ability of future generations to meet their own needs. To guarantee correct human development, Medina-Muñoz and Garcia-Falcó (1998) point out that the process should: (a) take place over time and space; (b) embrace ecological, social and economic interdependence; (c) include intergenerational and interspecies fairness; (d) care and prevent technologically, scientifically and politically; and (e) develop safeguarding measures from chronic threats and protection from harmful disruption.

According to Longoni and Cagliano (2016), sustainable development rests on three pillars: economic sustainability, social sustainability and environmental sustainability. However, Medina-Muñoz and Garcia-Falcó (1998) recognize a fourth and fifth pillar, which might be identified as the institutional and cultural aspects. Finally note that along these lines, the Brundtland Report (WCED 1987) conceptualizes sustainable development as four interrelated strategies: (a) managing the impacts of populations on ecosystems; (b) ensuring worldwide food security; (c) managing ecosystem resources; and (d) creating sustainable economies.

4.2 Axes of Sustainability Development

The importance of sustainability is now widely understood, especially taking into account the limited resources, the deterioration of the environment and the growth of the population (Black 1998). According to De Brito et al. (2008), sustainable development has three axes:

a. *Economic sustainability*. Economic sustainability is having a prosperous and fair economy. Humans have a responsibility to guarantee that resources are preserved for human beings in the future. Thus they should maintain resources at the same or faster rate than they are consuming them, conserving and providing equal distribution of other resources so that others can also enjoy them.
b. *Environmental sustainability*. Materials taken from nature are used for human survival. Tietenberg and Lewis (2016) evidence that environmental sustainability is important because it involves natural resources that people need for everything, thus all their needs and desires are fulfilled by absorbing the resources from nature. But the continuous depletion of natural resources will have a massive impact on the environment. So nature needs to be regenerated to avoid degradation and scarcity of natural resources (Bergstrom and Randall 2016).
c. *Social sustainability*. Social sustainability is perhaps the most critical aspect of sustainability, due to its significance for the preservation of humankind in the future. According to Bramley et al. (2006), to maintain social sustainability, law and order must be preserved, and everyone should live by the social values created for the good of the people. Thus, respect and cooperation are based on achieving social sustainability, and with it the maintenance of social balance and stability, as well as healthy and strong human relationships.

4.3 Sustainability as a Global Competitive Advantage

Baker and Sinkula (2015) and McWilliams and Siegel (2011) point out that companies have a competitive advantage when they achieve a higher return on investment than their competitors, or are able to do so. There are two types of competitive advantage: cost and differentiation. On the one hand, companies have a cost advantage when they can sell their products and services at a lower price than the maximum price it could command. On the other, a differentiation advantage is achieved when companies can offer differentiated products and/or services to customers, and—consumers in their turn are ready to pay an additional price which overcomes the additional differentiation costs. Strategically, companies desire both kinds of advantage but while the cost advantage position depends on internal company factors, and implies having the lowest costs in the industry, differentiation advantage has an external origin derived from consumer perception of unique value.

Competitive advantage can derive from one or more factors or sources. Barney and Hesterly (2009) and Porter (2011) show that among the sources of cost advantage are: scale economies; learning economies; efficient production process; capacity management; product design; and raw material and energy costs. As regards differentiation advantage, these authors point out that the sources include both tangible and intangible aspects of the product, brand or marketing strategy that are highly valued by potential customers, who are ready to pay an additional price for them (Barney and Hesterly 2009; Barney et al. 2011; Porter 2011). The tangible aspects refer to observable characteristics and attributes of the products and services, their performance, and complementary products and services, while intangible aspects include social, emotional, psychological and aesthetic considerations that consumers value, and which are present in any of their purchase choices.

Widely used by researchers in strategic management (Barney et al. 2011; McWilliams and Siegel 2011), the resource-based theory provides a model of how firms compete and achieve competitive advantages. According to Barney et al. (2011), this theory makes two underlying assumptions: (a) organizations competing in the same industry might be heterogeneous across the strategic resources and capabilities that they control and (b) these resources and skills might be not perfectly mobile and, thus, heterogeneity might be long-lasting.

There has been an active debate among management researchers and practitioners concerning the relationship between sustainable development and competitiveness. Generally speaking, the question is: can sustainability be a source of competitive advantage?

The prevailing view is that the goals of business and sustainability seem hopelessly irreconcilable, as being sustainable implies additional costs for enterprises and a loss of competitiveness. Recently, however, a new perspective has emerged in the literature on management, according to which sustainability seems a real source of both cost and differentiation competitive advantage. Thus, sustainable enterprises can also achieve essential benefits such as ecological efficiency, cost reductions, capturing emerging green markets, gaining a first-mover advantage in their industries, establishing better community relations and improving their image (Jayanti and Gowda 2014).

In summary, in the changing economic environment, business strategies have been refined, allowing leading multinationals to embrace practices that focus not only on the financial aspects of their business but also the environmental and social ones. Companies embed sustainability practices to optimize their operations and generate cost savings, but also to respond to a consumer increasingly aware of economic, social and environmental problems. Nidumolu et al. (2009) demonstrate that sustainability saves money through resource efficiencies—the reduction of energy, water and waste consumption reduces carbon emissions and costs. However, what is even more critical is that strong sustainability practices support the ability to win new business. Thus, increasing numbers of companies are moving forward with sustainability initiatives and using them as a critical tool to differentiate, win and keep customers.

4.4 Sustainability and Company Value Creation

The emphasis on sustainability that recent years have seen from companies has not only been because of the positive effect on corporate reputation, but also as a driver of growth and continuous improvement of the company in competitive terms (Bové and Swartz 2010).

The number of companies from different sectors is increasing, with sustainability conceived from a more strategic perspective and with more significant long-term scope for the creation of value. In this way they have been able to integrate it into their daily activity, with potential benefits in areas and variables that go far beyond corporate social responsibility, such as reduction in operating costs, organic growth, or opening to new markets and products.

According to the report published by Bové and Swartz (2010), 57% of the companies consulted recognize that their company has integrated sustainability into its strategic planning process. The area where this integration is seen most clearly is in the mission statement and values, followed by the external communication. However, many companies recognize that they still have "unfinished business" when it comes to management of the supply chain.

However, the same report shows the benefits of integrating sustainability into the processes developed by the value chain. Thus 33% of the companies consulted recognize the positive effect of sustainability on the reduction of operating costs. The most affected areas are productive, with a decrease in energy consumption and the cost of operations. The report also notes how companies are seeking sustainability both in the development of new products and services and in the improvement of existing products. With both activities coordinated and a commitment to sustainability, the competitive advantage resulting from the operational improvement is greater than would be derived from a re-engineering of processes.

Based on these results, it seems clear that international companies that are leaders in many sectors are beginning to show a strong predisposition to integrate sustainability into each and every one of their main activities, areas and functions of the company's value chain and, above all, to base competition activities on that parameter of sustainability, which will catapult them, if necessary, towards the leadership of their sector. Also, and driven by that competitive desire for sustainability, leading companies are much more predisposed to direct and manage their entire portfolio of products and activities with the latest trends in sustainability, so they show an undoubted commitment to R&D in everything that refers to sustainability, innovation and development of business and products.

There is no doubt that leading companies conceive sustainability both from a competitive and a strategic point of view. The contribution of sustainability to the creation of value has led a large number of companies to become oriented towards sustainability, seeking to understand not only the key factors that drive the creation of value internally, but also the way in which the leadership, or the management of the value chain, can contribute to creating value—and a return—from sustainability.

4.5 Sustainable Management in Fashion Companies

There is increasing awareness of economic, social and environmental problems, but at the same time, the need to differentiate from the competition is compelling companies to transition away from more traditional business operations and towards sustainability along the GVC as part of their global corporate strategy.

4.5.1 Fashion Value-Chain Management and Sustainability

Sustainability initiatives are crucial for the success of companies' strategies, mainly when they involve sensitive business areas such as intensive natural resource use or poor labor conditions, as is the case for the fashion industry.

The fashion value chain is particularly sensitive to sustainability due to its inherent characteristics, as well as some specific trends that international markets have imposed (Caniato et al. 2012). The production process makes intensive use of chemical products and natural resources (land and water), generating a high environmental impact. Furthermore, the search for lower-cost production has led to a dramatic relocation of production sites to African countries (Nordås 2004). In particular, it has caused traditional European industries to practically disappear, and relocation has entailed loss of female employment in the European textile and clothing industries, especially for unqualified labor.

In recent years, fashion companies' sustainable orientation has helped to improve their performance in a context of strong international competition. Since 2008, and as a result of economic and social crisis, a strong social trend towards sustainability has been consolidated. From a marketing point of view, new "responsible" consumer and stakeholder profiles can be found that demand sustainable products, but also sustainable and socially responsible behavior by companies. These new demands affect company performance (Mentzer et al. 2001; Al-Mudimigh et al. 2004). In this sense, De Brito et al. (2008) point out that value-chain performance cannot be measured merely by financial ratios, nor simply by logistics indicators such as cash-to-cash cycle time, lead time, on-time delivery or percentage of satisfying deliveries. It is affected by broader issues arising from both the internal organization of each actor in the chain and the quality of the relationships between the actors.

Companies' Attitude Towards Sustainability

Developed countries have ample legislation on sustainability. As a consequence, a large number of companies have been involved with sustainability programs forced by legislation (De Brito et al. 2008), although their attitude toward this subject can vary greatly according to the three axes of sustainable development. While some companies show caution in relation to recycling, working conditions and CO_2, others prefer to be ready for the change, and are constantly updating the new rules at USA and European levels. Other companies understand the strategic side of sustainable development and try to anticipate legislative changes to gain some competitive advantage from acting as first movers, thus transforming a constraint into an opportunity (Hill 2017). De Brito et al. (2008) even suggest that, impelled by the competitive advantage that sustainability might offer, some companies go beyond their legal obligations, encouraging regulators to set higher standards, thereby increasing competitors' costs and barriers to entry.

Today a sustainability orientation forms part of the mission and values of fashion companies who believe sustainability is part of their social responsibility and should be present in all the activities they develop. Corporate responsibility is about integrating social and environmental concerns into business strategy and operations. Companies apply sustainable management to establish a direct link between their general principles and guidelines, and the operational level. Within the value chain, the sustainable orientation mostly introduces new networking management systems based on the integration of all chain members, where there are shared sustainable values and the key function is responsibility management (De Brito 2007).

However, the responsible and sustainable management of the GVC is a complex process. As De Brito et al. (2008) point out, relocation strategies make the control of working conditions in the offshore production sites more difficult; or the smaller size of deliveries deriving from shorter delivery times may increase the amount of transport, and hence its environmental impact. Vermeulen and Ras (2006) show how different corporate cultures and particularly differences in ways of understanding sustainability can make the value-chain integration process more difficult. Finally, international companies must note that legal pressures differ in the various countries where they operate. They should comply with the most restrictive legislation and apply it to all value chain members if they want to reach and convince environmentally and socially conscious consumers.

The Impact of Sustainability on the Fashion Value Chain

De Brito et al. (2008) draw attention to the positive effect that sustainable management has on fashion GVC performance, with improved customer service and cost optimization, and the effective management of both the internal organization of each company and the external organization of the entire value chain.

Well-performing companies are those who effectively manage internal and external relationships (between functions and organizations) through improved coordination and total integration of the chain members. At the internal level, companies view differentiation, clean outputs, recycling and social fairness as the keys for all the axes of sustainable development organization. Product innovation and technology development can contribute to companies' internal sustainable management. Product innovation can be targeted to specific consumer markets, such as to the ecologically conscious customer (ecofashion). Technology development can introduce new machines and materials or revolutionize the production process, making it more efficient, cleaner and less costly (Sarma 2004).

The internal organization of companies can be oriented towards higher sustainability, and this orientation has effects on the external organization and the network of actors involved in the same value chain. De Brito et al. (2008) show that one of the main effects is the development of partnerships between the actors in the chain and with some professional organizations, broadening the chain 'space' or 'sphere' of coordination. Other evident effects concern the coordination of logistics and transport functions, as well as the creation of shared information systems between value chain members (Prajogo and Olhager 2012).

4.5.2 External Drivers of Companies' Sustainable Management

Companies can be proactive and show a high degree of sustainability orientation, but external drivers also force companies to make sustainability a strategic goal. Savitz (2013) shows how societal agents—such as governments, NGOs, stock exchanges—along with shareholders, investors, trading partners and customers are at first the main stakeholders to put pressure on companies to invest from a triple bottom line perspective (economic, environmental and social). Shrivastava (1995) states that governments, consumers and corporations play a crucial role in the drive for sustainable development. However, Benn et al. (2014) show that while companies put the achievement of sustainability on their agenda, they require ecologically sustainable political and economic systems. Benn et al. (2014) point out that:

a. governments, as well as selectively mitigating many environmental problems by undertaking appropriate programs, must also establish ecologically sustainable economic policies, and
b. consumers must be willing to consume fewer products and use them more wisely.

Apart from the structural shift in world energy markets towards renewables, or increasing awareness of climate change, and social and economic inequality, CEOs understand the business benefits of embedding sustainability practices into their companies. This is because independently of government policy, a vast number of companies drive sustainability initiatives across their organizations' companies and supply-chain value chains, looking to increase their environmental, social and governance (ESG) performance measure. Note that ESG performance has become the main criterion for measuring the sustainability and ethical impact of an investment in a company or business. This metric lets companies determine their future financial performance (return and risk).

4.6 Challenges of Sustainable Strategies in Fashion

According to Gardetti and Torres (2017), "Sustainable fashion is a part of the growing design philosophy and trend of sustainability, the goal of which is to create a system which can be supported indefinitely regarding human impact on the environment and social responsibility". It can be seen as an alternative trend to fast fashion (Joy et al. 2012).

A wide variety of approaches are used in the analysis of the fashion business, but from an economic and business perspective, fashion can be defined as a cycle that allows some mature industries, such as clothing and accessories, footwear or even cars, to be dynamic and maintain certain profitability over time (Fletcher 2013).

Sustainability is the main vector of differentiation for fashion companies in today's world context. In a fast-moving industry such as fashion, sustainability is a concept for designers to explore, breaking new ground in the environmental impact of the production supply, end use or lifecycle of the product. But despite the growing interest in sustainability issues within the fashion industry, currently there is no common definition of what sustainable fashion means. According to Green Strategy (2014), sustainable fashion can be defined as "clothing, shoes, and accessories that are manufactured, marketed and used in the most sustainable manner possible, taking into account both environmental and socio-economic aspects. In practice, this implies continuous work to improve all stages of the product's life cycle, from design, raw material production, manufacturing, transport, storage, marketing, and final sale, to use, reuse, repair, remake and recycling of the product and its components."

From an environmental perspective, the aim should be to minimize any undesirable environmental effect of the product's life cycle by (a) using renewable energy sources (wind, solar, etc.) at every product cycle stage; (b) ensuring natural resources such as water, energy, animals, plants, land, soil, and so on are used efficiently and carefully; and (c) maximizing the recycling, repair or remaking practices of the product and its components. From a socio-economic perspective, all stakeholders should be on the same page with good ethics, best practice and international codes of conduct, and should strive to improve present working conditions for workers everywhere—in fields, factories, the transportation chain and stores. In addition, fashion companies should contribute to encouraging more sustainable consumption patterns, fabric care practices and overall attitudes to fashion (Green Strategy, June 2014). But the main challenges that fashion companies face is to deliver a blend of both sustainability and elegance. As De Guedes and Roncha (2011) show, fashion products are the result of a long chain of stages, activities and technologies that sometimes rely on external partners scattered across the world (Caniato et al. 2012). In this context, the axes of sustainable development are particularly sensitive for the fashion retail GVCs (De Brito et al. 2008).

On the economic axis, the delocalization of production in developing countries in recent years has inverted the economic growth of the fashion industry in some African countries (Caniato et al. 2012). On the environmental axis, fashion sustainability development makes very intensive use of natural local raw materials, apart from the intensive use of chemicals such as for dyes (Nagurney and Yu 2012). Finally, on the social axis, local suppliers' integration into the value chain with the emergence of small local industries that are sometimes led by women favors the economic and social development of the territory.

There are many factors to consider when evaluating the sustainability of a material—renewability and source of a fiber, how a raw fiber is turned into a textile or even the working conditions of the people producing the materials. As we have seen, there are three types of sustainability economic, environmental and social. Though organic cotton is considered a more sustainable choice for fabric, as it uses fewer pesticides and chemical fertilizers, it remains less than 1% of global cotton production. Barriers to growth include the increase in the cost of labor and the reduction in the amount of cotton obtained (given their greater sensitivity to pests). The upfront financial risks and costs are therefore shouldered by farmers, many of whom struggle to compete with the economies of scale of corporate farms (Kumar and Carolin 2018). But for a local supplier to win a more durable relationship with the lead firm, it needs to become cheaper, provide better quality and quicker delivery, and be more reliable than its competitors within an industry. Such process upgrading can lead suppliers to change their practices, moving upwards to a higher value-added segment in a GVC, for instance, specializing in the design and other requirement-specific production (Nicita et al. 2013b).

Non-policy factors are also among the determinants of a successful process and product upgrading. These include: (a) the length of the value chain to the final product; (b) the structure of the global supply chain; (c) the market situation; (d) the product characteristics; or (e) the comparative advantage, including geographical and/or population consumption assets (e.g., being close to a big market, having a large domestic market) (Nicita et al. 2013b).

Slow fashion, the alternative to fast fashion and part of what has become known as the "slow movement", advocates principles similar to the principles of slow food, which are:

- Good: quality, flavorsome and healthy food
- Clean: production that does not harm the environment
- Fair: accessible prices for consumers and fair conditions and pay for producers.

The slow fashion movement has an increasing number of followers. It is not a seasonal trend, but rather a philosophy of responsible clothing consumption. The movement educates citizens about the impact of garments on the environment, the depletion of resources and the impact of the textile industry on society. The term "slow fashion" was coined in a (2007) article in *The Ecologist* by Kate Fletcher, who compared the eco/sustainable/ethical fashion industry to the slow food movement: "some elements of the slow fashion philosophy include: buying vintage clothes, redesigning old clothes, shopping from smaller producers, making clothes and accessories at home and buying garments that last longer". Thus, new ideas and product innovations are constantly redefining slow fashion, so using a static, single definition would ignore the evolving nature of the concept.

According to Accenture (2017), four megatrends will lead the future of slow fashion.

1. "Power of Nature": the industry looking into materials that have always been regarded as waste as a more sustainable method of making new clothing.
2. "Rent a Closet": this trend reduces the purchase of new clothes and disposal of clothing, which means less waste.
3. "Long Live Fashion": the Vintage revival. Vintage clothing is a way of reducing the amount of clothing that is disposed of and ends up in landfills.
4. "Innovative Recycling": looking at waste as value. The industry is starting to create incentives for consumers to participate in the recycling of clothing.

According to these trends, consumers will increasingly want to know the origin of the clothes they buy: where they are manufactured, with what materials and by whom. The consumer will be immersed in the entire process from the time the garment is designed until it is purchased. Their behavior will be defined by the following rules:

1. Oppose fashion produced in supra-industrial quantities.
2. Look for craft products to support small businesses, fair trade and locally made garments.
3. Promote the recycling of clothing by buying second-hand or vintage clothing and donating garments that are no longer used.
4. Choose clothes made with sustainable materials and produced ethically.
5. Include classic clothes in our wardrobes that last longer.
6. Make our own garments: repair, customize and alter to lengthen their life.
7. Reduce clothing consumption: do not buy compulsively but choose special clothes of the highest quality.

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CHAPTER 4

The Fashion Industry in Africa: A Global Vision of the Sector

Miriam Aziz, Charbel Salloum and Laurice Alexandre-Leclair

1 Introduction

Africa is thecontinent most widely acknowledged for its variety of fashion products. The patterns, designs, materials and metals or colors usually speak of African history and culture. African fashion products also have an essential significance in spreading information and communication within their communities.

The spiritual and historical significance of products is evident not only in the choice of colors, dyes and types of thread but also in the decoration, symbols, jewels and other complementary elements and the shapes

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which are directly related to events, persons and traditional proverbs. Some clothes made from geometric stripes create harmony, others represent storytelling through words and messages that are important to people, families or larger social units. Clothes are also used for special occasions such as tribal events, weddings, funerals, naming ceremonies and burials. Jewels and other accessories such as turbans made with ostrich feathers or straw, and embroidered leather sandals are worn with fabric wrapped around the hips and waist to form a skirt with another piece thrown over the shoulder or made into robes or tunics according to region, historical tradition and custom. The same textile can be used as a backdrop in public ceremonies or in a theater, or as a carpet or tapestry.

Various regions of Africa have specialized in the field of fashion. While South Africa, Lesotho and Swaziland in the south have become important textile and fashion clusters, oriented towards the export of their own brands, North Africa concentrates on the production of clothing because of its geographical proximity to international fashion companies. Morocco, Egypt and Tunisia have developed important industrial hubs made up of small sewing ateliers that employ low-skilled labor, mainly female, and that have specialized in making garments for the leading European fast-fashion brands. West Africa is regarded as one of the world's great textile-producing regions, due to the availability of cotton in at least two different colors: white and pale brown. It is exported to other areas like the northern Sahara, and in both regions there are other colors derived from vegetables, animal hair and mineral sources (Picton 1989). Generally, textiles in Africa are hand made in rural areas using skills and commitment handed down from one generation to another. Southern and Eastern Africa is the main producer of precious stones, some of which are subsequently worked by local craftsmen in artisan workshops, and then sold to large European companies.

African fashion products have inspired fashion designers all over the world, including Jean-Paul Gaultier, John Galliano, Anna Sui and Alexander McQueen, and have been worn by music and film stars such as Rihanna, Beyoncé and Kanye West. However, the African fashion industry is not valued internationally. Whether as a source of sustainable raw materials and quality, as a place where leading fashion brands produce their products, or even for its wealth of skilled, talented, sophisticated designers and makers of textiles, clothes, jewelry and accessories, Africa has so far been under-represented in the global fashion industry.

Despite these difficulties, it is clear that the potential of the African fashion industry lies in its ability to combine modernity and exclusivity with tradition and sustainability (Bell and Morse 2013). Today's African fashion products give artistic expression to the religion, society and economy of the continent. They add extra value because they are produced in a contemporary way but without losing sight of tradition; they are unique products and designs, hand made in small craft workshops or sewing ateliers using sustainable and non-polluting raw materials.

2 Analysis of Fashion Companies in Africa

Throughout the African continent, a large number of different-sized companies can be found specializing in diverse fashion products: design and production of yarn, cloth, clothing accessories, footwear, jewelry, and so on.

It is important to highlight the use of raw materials obtained naturally, through environmentally sustainable production processes. Thus, in the production stage for textiles, clothing and some accessories, the raw material may be natural, synthetic or cotton. It may come from animals, such as sheep, goats, rabbits or silkworms, mineral fibers including asbestos, or from plants such as cotton, flax and sisal, or may be a synthetic fiber made by extruding a polymer. Other practices developed by local companies relate to the integrated implementation of cleaner and more efficient industrial practices (UNCTAD 2012). With the support of the United Nations Industrial Development Organization (UNIDO) and UNEP, national cleaner production centers have been established in the leading fashion production focus areas of Egypt, Ethiopia, Kenya, Morocco, Mozambique and South Africa. Among other objectives, these centers help companies to increase their efficient use of water, energy and raw materials, improving their competitiveness.

The African fashion industry is an ancient one. The ancient Egyptians began cultivating flax and weaving it into linen. Several other civilizations grew in Africa, where cotton became the most cultivated raw material used for textiles and clothing. Tradition can still be seen in the textile industry that is growing across Africa. For example, the bogolan or mudcloth is hand-woven Malian clothing; Kente cloth from Ghana is a type of silk and cotton, made of interwoven cloth stripes; and the ndebele is a colorful hand-made textile from South Africa and Zimbabwe. Fibers extracted from raffia are still used in the production of bags, hats and clothes (Dr. Y 2017).

Countries in West and Central Africa, such as Burkina Faso, Ethiopia, Senegal and Mali, have become important suppliers of cotton, an essential raw material for the fashion industry. According to the data provided by OECD in 2015, Africa produced around 1.3 million metric tons of cotton lint, approximately 5% of world cotton production, but its consumption of cotton fiber is around 23% more than its production (OECD 2017). The significant gap between production and consumption suggests that the industry is having difficulty reaching its full potential. However, the African Cotton and Textile Industries Federation (ACTIF) claims that the continent can produce much more cotton than it is currently doing, because they have the necessary soil for cultivation, and a population with skills and production know-how. Since 2016 the Aid by Trade Foundation and ACTIF have been promoting the "Cotton made in Africa" initiative to promote sustainable cotton production in sub-Saharan Africa. The agreement seeks to boost productivity, competitiveness and sustainability of cotton production and strengthen textile production in the continent. This cooperation will also enable a better response to the growing demand for production by retailers such as H&M, PVH or Bestseller. But above all, it seeks to enhance the marketability of African products and ensure a lower environmental impact throughout its production process, taking advantage of the fact that since January 2016 the World Trade Organization (WTO) has allowed African cotton producers to market their merchandise to developed countries without tariffs. This decision is expected to boost cotton exports from the less developed countries of the continent, especially those in the sub-Saharan area such as Burkina Faso, Chad and Mali.

Exports to Europe are increasing on account of the EU's Economic Partnership Agreements with African countries. However, the primary export target for African fashion products remains the USA. Following the 2000 African Growth and Opportunity Act (AGOA), now renewed to 2025, export of fashion products has been increasing, especially textiles and apparel. Approximately US$1 billion in apparel is exported annually to the USA under AGOA.[1] Although Egypt is not considered

[1] The purpose of AGOA, which was approved by the US Congress in May 2000 and has been renewed to 2025, is to assist the economies of sub-Saharan Africa and to improve economic relations between the United States and the region. The program offers the

Table 1 United States textile and clothing imports, 2016

Country	*Imports to USA (thousands US$)*[a]	*Import product share (%)*[b]	*AHS weighted average (%)*[c]
Angola	3.08	0.00	9.30
Botswana	4981.05	1.12	14.40
Cameroon	342.41	0.21	16.91
Cote d'Ivoire	100.56	0.01	8.93
Egypt, Arab Rep	898,117	57.51	11.75
Ethiopia	34.457	13.94	15.98
Ghana	6631	1.98	15.05
Kenya	352,218	61.75	13.29
Mauritania	45.68	0.09	13.05
Mozambique	97.19	0.09	1.13
Nigeria	251.74	0.01	8.66
Rwanda	462.63	1.75	8.16

Source World Bank (2018)
[a]Total import/export value in thousands of US dollars current value
[b]The share of total merchandise trade (export or import) accounted for by the product in a given year
[c]Effectively applied weighted average (%) tariff—the average of tariffs weighted by their corresponding trade value

one of the countries that export under AGOA, exports from Egypt to the US market reached 898,117 thousands US$ million in 2018 (World Bank 2018). Of these, about 20% corresponds to products of the fashion industry—mainly textiles and apparel. Table 1 shows US textile and clothing imports in 2016. Note that imports from Egypt are higher than those from other countries such as Kenya or Nigeria that belong to the AGOA Agreement.

Demand for African textiles has increased even though African people do not own the industries. The industries have mixed ownership structures, meaning that people from outside Africa come in and

participants preferential access to US markets with no import taxes. To qualify and remain eligible for AGOA, each sub-Saharan country must be working to improve the rule of law, human rights and respect for core labor standards. AGOA provides duty-free access to textiles and apparel subject to the wearing apparel provisions which have their own requirements and rules of origin. For example, apparel made in a less developed beneficiary country is granted duty-free access, even when the fabric used in such manufacture is sourced from third countries. Textiles are also eligible provided that they are manufactured in the AGOA beneficiary countries (AGOA 2018).

open the factories, sometimes partnering Africans and sometimes not. Examples include Cargill, Olam International and Plexus Cotton Ltd. However, at the clothes level ownership is more oriented toward Asian individuals such as Chinese, Indians and Bangladeshis who have built branches in Africa to benefit from AGOA and duty-free exports to the European Union (Brown 2016). The agreements signed with the USA and the EU also affect the export of precious metals such as gold and diamonds, and raw materials such as cotton. South Africa, Ghana, Mali and Burkina Faso have become gold exporters, while Sierra Leone, the Democratic Republic of the Congo, Angola and Botswana are major exporters of diamonds. As with the textile industry, the exploitation of these materials is in the hands of foreign private companies or joint ventures owned by international companies and local governments.

About 10% of the world's cotton comes from Africa, and most of it is exported to Asia for further manufacturing, when it is labeled "cotton made in Africa". China has been the principal investor in Africa since 2015. The low labor costs and the quality of raw materials have led China to invest in different sectors, from the production of raw materials to fashion products. However, the high exports of cotton do not benefit African countries, since relatively low levels of employment are created, while the benefits derived from sales of the finished product go to other countries. As we saw in Chapter 2, this is what has motivated some international European and North American companies—such as H&M and PVH who produce for Calvin Klein and Tommy Hilfiger—to transfer part of their production to Africa. Likewise, some companies in the footwear sector, such as Sawa or Pikolinos, have started manufacturing in Ethiopia and Kenya, due to the excellent quality of their materials and low labor costs.

The fashion industry in Africa and indeed the sub-Saharan region is facing tensions associated with the domestic and international markets where there is strong competition from cheap Asian products. Additionally, in some subsectors such as textiles, workers and their trade unions find themselves in a dangerous and delicate situation for two reasons. First, they have to fight disrespectful labor practices that include poor wages, lack of benefits and the violation of their rights. Second, they will be involved in restructuring the industry, which is shaped by extreme competition, from Asian industries, putting pressure on workers and the environment alike (Jauch and Traub-Merz 2006).

The gradual withdrawal of the old system, with new trade rules and the ending of the quota system in industrial nations in 2005, has cost Africa many jobs in the industry, as reported by the International Textile, Garment and Leather Workers' Federation (ITGLWF). This withdrawal has left millions of people without a job or a stable income in countries including Lesotho, South Africa, Swaziland, Nigeria, Ghana, Mauritius, Zambia, Madagascar, Tanzania, Malawi, Namibia and Kenya. The ITGLWF set up a meeting to explore plans to help Africa by attracting investment, improving the welfare of workers and increasing the efficiency of the fashion sector.

African countries can only delay Chinese exports for a short time. This could buy some time for producers to improve their efficiency and competitiveness, and add some value to their products by, for example, producing easily exportable high-end fashion products. Some African countries have opened negotiations on duty-free entry of their products to China in exchange for Chinese investment in Africa. For example, manufacturing in Lesotho is based largely on textiles where the majority of its people work. However, with the rapid progress of China and India, cheap and easy countries for textile manufacturing, it became harder for African countries and certainly for Lesotho to compete with them (Mutume 2006).

Another example is Egyptian textiles, seen as the primary pillar of their economy and considered one of the country's main exports apart from oil. This sector is a source of employment, income, welfare and benefits for Egyptians, employing approximately one million of them. Furthermore, Egypt is known as the most significant producer of cotton and textiles in the African continent. Egyptian cotton has an advantage over others because they produce the prized "long staple" cotton, which is considered the gold standard in the textile industry. This type is used for the production of luxurious, high-priced textile products. As a result of the high price, "long staple" and high-end cotton production leads to losses and it cannot be used in Western countries for the production of shirts and jeans. Finally, the Egyptian textile industry is aiming to strengthen its supply chain and expand the industry to add new fashion segments (Zawya 2016).

3 The African Fashion Industry by Region

Africa's colorful, different and original textiles help them create distinctive, glamorous, interesting and lively fashion. The tradition of craftsmanship and textiles is strong, and the introduction of new designers and entrepreneurs in the fashion industry helps improve the sector and launch more and more of their culture to the world. All countries are fascinated by their designs and cultures. However, the majority of African countries face many challenges regarding textiles and clothing that are under the umbrella of fashion. These challenges include the Chinese domination of the textile industry, the unavailability of fabrics, the lack of an international presence and industry-related education. We will discuss the differences between the North African and Southern African countries using three example countries from each.

3.1 North Africa

The North African countries are of two types: the Arabic countries extend from Egypt to Morocco and the rest are regarded as sub-Saharan countries. We select three countries for a discussion of their progress in fashion: Egypt, Nigeria and Mali.

We start with Egypt, the country that links North-east Africa with the Middle East and dates from the time of the Pharaohs. Since the revolution, in 2011, clothes have been improving with new types, new colors and ways of dressing, new emerging fashion designers and new ways of thinking. However, the materials used remain the same. The nineteenth-century German philosopher and sociologist Georg Simmel (1971) said that sometimes, fashion is an imitator helping people to fulfill a particular role and adapt to a specific society. Upper-class Egyptian women travel to Paris, Milan or even Rome to buy branded clothes such as Chanel, Dior and Yves Saint Laurent, a practice that is being transmitted from one generation to another and continues today. In a single Egyptian street, however, we find a variety of different fashions. Some women look sexier and more fashionable than others; some wear bright colors, tight jeans, make-up, shorts and skirts; others wear long dresses and no make-up; and yet others wear face-veils (Abaza 2007).

Fashion has changed in Egypt due to civilization, culture, travel and creative fashion designers developing personal lines and collections with specific signatures and styles, such as Amani El Cherif and Laila Youssef. According to them, Egypt is at the forefront of development and is moving ahead to one day become a city like Paris, New York or Milan. Nevertheless, fashion designers are struggling to improve and become involved in this field because there is no opportunity to learn about fashion in the country, so to learn all the necessary fashion techniques and know-how, they have to travel to countries such as France, the USA and Italy. We should also not forget Egyptians actresses such as Faten Hamama, Hind Rostom, Soad Hosny and Yousra, an inspiration for fashion designers and ordinary people alike. The other problem that a designer might face in Egypt is scarcity of materials. Not all types of textile needed are available, with the majority imported from abroad, this time from China (El-Tobgy 2013).

Despite the difficult economic situation, Egypt has started to host fashion festivals that show their love for arts, design, clothes, jewelry, accessories, beauty and creativity. These attract tourists from many countries particularly Arab nations.

Nigeria, known as the "Giant of Africa" because of its large population and economy, is situated on the Gulf of Guinea and has many natural landmarks and wildlife reserves. Nigerian fashion is diverse, showing the different religions, ethnic groups and cultures in the country. The fashion industry has developed new structures, earnings and exposure for the clothes and trained many professionals including designers and stylists, make-up artists and hair stylists, journalists and models. With the advent of fashion journalists, many magazines are dedicated solely to fashion and carry interviews with Nigerian fashion designers and models. Nigerian fashion is targeted at the whole world, not just their own people (Oberhofer 2012). The country is gaining a reputation for creative fashion. Some designers are showcasing on world runways, winning acclaim by dressing celebrities including Beyoncé and Michelle Obama. These designers include Maki Oh, Duro Olowu and Jewel by Lisa. Fashion weeks, online media and social media are helping the fashion designers in Nigeria to promote their brands and clothes to a wider market; in addition new retail shops, local multibrand boutiques and online shops are being developed to showcase Nigerian fashion design. However, there are no schools or training centers to help designers learn more about tailoring, cutting, styling, marketing and public relations. There are no government or official bodies providing funds, while the infrastructure is weak, which slows down production with high costs. With the enhancement of the fashion industry in Nigeria, the economy will flourish, and more employment opportunities will open up, particularly for young people Lloyd and Robbins (2014). Lagos, the largest city in Nigeria, undoubtedly needs more time to match the big four capitals of the fashion world: Milan, London, Paris, and New York.

Mali's official name is the Republic of Mali, a landlocked country in West Africa. Its capital is Bamako, the seventh largest in the West African Urban Center. The fashion industry began to develop in the country in 2011. The fabric of choice for all occasions in Mali is bazin, also called damask. It is hand-dyed polished cotton used in fashion manufacture. The work of women has turned creativity into a source of power to fight poverty. Mali started to export to neighboring countries such as Nigeria and Senegal, and traders from other countries came to Mali on their own initiative to buy bazin. The women of Mali responded to the increased demand by producing new exotic dye colors (Ighobog and Haidara 2012). In May 2016, the Malian trade association launched Project Balma with a workshop with all the equipment needed for clothing and sewing. The objectives were to promote fashion, contribute to sustainable development of the fashion industry in Mali, encourage young designers to start their own fashion line using Malian textiles, and promote "made in Mali" nationally and internationally (Souleymane dit Malkom X 2016). Chris Seydou is a Malian designer who promotes African design all over the world. In the world of haute couture he manages to strike a balance between local tradition and the international market, and he is known for his use of African textiles including the Malian bogolan. He was the first craftsman to give hope to an emerging new generation of stylists providing a new vision of Africa (Rovine 2011). The work of Alphadi, another fashion designer from Mali, has appeared on catwalks from Paris to Dakar and has been widely praised. Seeking to inspire other African fashion designers, Alphadi uses many types of fabrics including silk, leather, hand-dyed and embroidered, to make original, beautiful, one-off garments (Sappellestyle 2013).

3.2 Southern Africa

The Republic of South Africa (RSA) stretches along the South Atlantic and Indian Oceans and is the largest country in Southern Africa. The fashion industry has been reviving since the ending of apartheid in 1994. Training institutions were established to train designers, and in 1997 South African Fashion Week was established. National self-confidence began to increase, and South Africans began to exploit the available power and resources to develop their own clothing brands, either traditional or showcasing contemporary African design, rather than relying on international ones. Some of these brands—Sun Goddess, Stoned Cherrie and Loxion Kulca—became internationally accepted. In 2011 the capital, Cape Town, launched the Wear Only ZA initiative to increase fashion design and production in South Africa. This idea fostered the demand for local clothing and built trust between people and the South African brand, which would affect the clothing and textile industry in the country positively.

Fashion weeks attract international designers, customers and entrepreneurs, as well as stimulating tourism, and in South Africa there are two—South African Fashion Week (SAFW) and Mercedes Benz Fashion Week (MBFW)—both under the supervision and collaboration of the African Fashion International (AFI). SAFW supports designers by showcasing their clothing lines, provides them with equipment, and puts them in touch with business entrepreneurs and shops. They have also introduced a virtual shop promoting the work of local designers. In support of the fashion industry, the South African government designated Johannesburg the city of creativity (Kimani 2016). The fashion industry is growing fast, and even though it is facing such challenges as infrastructure and funding, it is reaching a wide range of consumers who care about fashion, through e-commerce, social media and the fact that international industries are looking for something new to see and display. Though the invasion of international brands such as H&M, Zara, Topshop and Cotton On stole many customers from local retailers and designers, the Instagram platform has helped designers to share their clothes, and increase online sales and acquire a loyal customer following. Designers receive feedback on every picture displayed on the application (Ngubane 2017). During the last ten years, emerging young designers have gone on to international careers. David Tlale, an award-winning designer, is a household name in South Africa due to his glamorous couture and expert craftsmanship. He is known as the master of drapery, sculptural detailing and exquisite appliqué (Collison 2017).

The Republic of Angola is situated in Southern Africa with one of its borders on the Atlantic Ocean. It is the seventh largest country in the continent, and its largest city is the capital, Luanda. After the civil war, a fashion industry with talented and creative designers began to appear and gain recognition for their fusion of African and international styles. Over time, Angolan fashion has evolved, and new, talented creative designers have appeared, using new techniques to make clothes. They focus on the quality and the creativity of their unique and innovative clothes, shoes and accessories. Angola's challenges are the poor infrastructure available, lack of capital, lack of education and the absence of connections with reliable partners. There is also no security or government support for leading fashion designers and creatives in Angola, but they are working hard to get some support and funding, and despite their disadvantages there are some Angolan fashion designers that excel, have achieved a good reputation in the market and are taking Africa and Angola to the world. Carla Silva, one of Angola's top designers, has been in the industry for over twenty years. Her style mixes African and European textiles. Another example is Nadir Tati, known for her top eveningwear brand. Her designs are based on the tradition and culture of Angola, and her purpose is to influence people and instill knowledge of it in the design of clothes (Admin by Adiree 2016).

A number of Angolan models, including Maria Borges and Sharam Diniz, are successful locally and internationally; they are among the top ten African models (MissGoodliving 2016). In an interview with *Forbes*, Borges stated that her native country focuses significantly on the music industry, with a smaller market in fashion and many citizens who do not know the meaning of modeling and fashion designer (Eytan 2017).

The Republic of Zambia is another landlocked country in Southern Africa. The fashion industry in the country has been evolving locally and internationally due to their design and textiles, which has opened up new job opportunities and helped the country's economy (*Lusakatimes* 2017). In 2014, the Zambia Fashion Council was established; its role was to develop the fashion industry of the country. It is committed to improving the industry by supporting young talented individuals who demonstrate a passion for fashion. The council has launched a program to help gain information and know-how from the fashion industry and learn how it works. They also run biannual workshop seminars (Zambia Fashion Council 2015). The number of fashion designers in Zambia is increasing year on year, showing that talented young people, far from waiting for employment, are starting to create their own opportunities. The Zambian fashion industry is moving fast and it is predicted that in the future the country will have plenty of big fashion houses with internationally known designers working together (Kalpinde 2017).

In conclusion, Northern African and Southern African countries have many similarities, including the absence of infrastructure, partners, education, schools and universities. They are also both trying to improve the fashion sector by learning skills domestically and showcasing them to international audiences. Many of their designers have become internationally known due to the originality of their designs, which many celebrities are starting to wear. However, the main difference between the two regions is that Northern Africa is moving a little faster than Southern Africa. There are many influencers in fashion, including actors, bloggers, fashion photographers and journalists. Designers, models, clothing stylists, fashion photographers, make-up artists, hair stylists and fashion journalists are flourishing in the Northern African countries, and their fashion shows welcome many local and international designers. The red carpets used to display celebrities' clothes, shoes and accessories are not found in the Southern countries. In the end, Southern African countries will need to work a little harder than those in the North to put themselves on the fashion map, refocusing on local rather than international brands.

4 Development Level, Product Types, and Environmental, Economic and Social Sustainability

Each African country has its own cultural products related to its traditions and way of life. Local designers have popularized the continent's image by using materials, designs and textiles that have prompted some celebrities to wear original, unique and beautiful African designs. African-influenced designs can now be found on the catwalks of the four big fashion cities: Paris, Milan, New York and London. Many creative industries including music, TV, dance, cuisine and fashion enable countries to earn billions of dollars and be integrated with the whole world. They offer many job opportunities for the growing workforce and attract tourism, which boosts the economy. Individuals are starting to acknowledge the potential to support the development of the fashion industry, create new jobs, integrate countries, connect societies and strengthen African identities globally.

While the fashion industry in the African continent is continuing to develop, it is still considered to be in its infancy. New technologies in manufacturing, marketing and distribution are boosting the growth of these industries and providing employment for both women and men. This process is adding many values and qualities along with the job opportunities for locals, bringing hope and change to desperate individuals, particularly women and young people, while contributing to the transformation in the structure of the economy and social life of Africans.

Governments need to create the right policy environment for businesses to attract foreign investors who want to work with African designers and build factories. Some of the world's leading clothing companies are opening stores in African countries, such as H&M in Ethiopia. However, the cost of doing business in Africa is high for several reasons, including energy shortages, poor access to and high costs of energy (many manufacturing businesses have to have their own generators), transport, logistics and custom facilities, which impedes business growth. To increase production quality and productivity, they also need to invest in skills, qualifications, know-how, and education. With increasing awareness that education in fashion is essential to the sector's improvement, the governments of Ethiopia, Lesotho and Kenya are building learning centers and tertiary institutions to provide theoretical and practical qualifications for the fashion industry (Gregorio 2016).

In 2015, nine of the fastest-growing economies in the world were African, and though they have represented a small market until now, the rapidly growing middle and super-rich classes are highly conscious of their appearance and their buying choices (Translatemedia 2016). The market for luxury and mid-market fashion is growing in Africa. In Nigeria, for example, with its fashion-conscious population, the economy is showing an increased growth rate. Traditional craftsmanship and textile heritage passed down the generations, together with the emergence of creative designers and entrepreneurs, is boosting the fashion industry and the wider economy. The fashion industry tends to be concentrated in the largest cities, such as Lagos in Nigeria, where the population's broad fashion interest is making for a flourishing industry.

Foreign brands, especially luxury brands, find it hard to penetrate the African market. For example, only Louis Vuitton has opened stores in South Africa. Non-African brands prefer to enter the continent through South Africa, because of its European tastes. Toesland (2016) claims that the label "Made in Africa" does not have the same effect on customers as "Made in France", "Made in Italy" or "Made in The United States", but African designers such as the Nigerian Adebayo Oke-Lawal are working hard to improve their image. Toesland (2016) goes on to say that the world is paying more attention to African fashion design and the culture of which it is an integral part; and the media, fashion buyers and entrepreneurs are noticing and talking about these unstoppable, fresh and highly profitable voices. Designers have emerged from different countries, each with their own style of clothes, while also introducing culture, tradition and contemporary touches. Bags, jewelry, turbans and hats are made that relate to the clothes; for example, the turban is one of the main accessories because it is an integral part of tradition and culture. African fashion is known for its audacious use of color, from acid oranges to luminous blues, with printed designs that have global appeal, as well as being affordable and attracting people of all classes. Streetwear, as worn by rap singers, is a style now seen across the world. Adebayo Oke-Lawal is one of the African designers behind the streetwear brand and the orange culture, which has been described as more of a movement for a creative class of men than a clothing line (Gbadamosi 2016). Other designers have revealed their personalities through their apparel, shoe and accessory designs. Some have opened virtual or physical stores as well as showing two haute couture and prêt-à-porter collections each year for global audiences.

The textile and fashion industry, like all industries, has its own impact on the environment. Rapidly changing trends inducing consumption lead to much environmentally damaging use of resources and clothing waste (Fletcher 2007). While transportation and agriculture are the critical factors for climate change, “fast fashion” also plays a significant role. The garment industry is the world’s second-biggest polluter, due to its complex global supply chain from the farming of cotton to the manufacture, dyeing, printing and bleaching of fibers, all of which use chemicals. Cotton production uses a great deal of water and high percentages of fertilizer and pesticides to increase output, which contributes to air and groundwater pollution, and soil degradation. Each year, a large quantity of textiles is sent to waste, because of the production of non-conformities, most synthetic fibers do not decompose and wool releases methane after a year’s decomposition in landfill (Stecca and Ndachengedzwa 2016).

According to Turner (2013), the fashion industry enhances economic development in the African continent in three ways. First, it encourages entrepreneurship—for example by helping a creative individual with an eye for fashion, creativity and color to generate income locally by opening stores and internationally through the internet. Second, it stimulates the local economy by employing talented dressmakers, textile artists, models and support staff to showcase collections. Third, it acts as a sustainable business model based on the hereditary clothing and apparel industry. Many women and young people work in the labor-intensive fashion industry, helping to improve their underdeveloped and developing countries' competitiveness. Through their work in this sector, women are increasing their independence and making progress toward gender equality.

5 Opportunities and Challenges of the African Fashion Industry

The fashion industry in Africa is proving to the world that it is unstoppable, fresh and highly profitable. Fashion markets are fascinated by African culture and design. Why, then, are African fashion companies not successful on the more famous fashion catwalks?

Within Africa, the biggest markets for fashion products are South Africa and Nigeria, which have both developed a strong fashion industry, with local fashion companies becoming referents in international markets. Other countries such as Ethiopia and Mauritius are on the rise and are experiencing growing demand for fashion products. Young African designers are finding opportunities to showcase their work in platforms like Swahili Fashion Week in Tanzania, Kenya Fashion week in Kenya, Lagos Fashion and Design Week in Nigeria.

The potential market for Africa's fashion industry is enormous in both size and value. The interest in African design has always been there, but lack of visibility and exposure made it difficult for African designers to show their potential to the world. With the increasing use of e-commerce, Africa's role as both a consumer and producer of fashion is on the rise. Social media and other communications channels give African companies and people the opportunity to purchase from retailers with no physical presence on the continent and allow small fashion houses to showcase their collections to a global audience. African shopping websites such as Afrikrea, Jumia and Konga give global access to fashion and offer on-trend fashion at all price levels with products that are just beginning to gain well-deserved visibility.

The industry has the potential to diversify African economies and become one of their main drivers. In order to achieve this, however, African governments and other stakeholders need to invest and open up opportunities for the talent pool available in Africa. The growing importance of young people should also be taken into account, especially women who experience low levels of education and high levels of unemployment. They need to be supported through the promotion of projects that they can lead and which may favor their participation in the labor market. Taking Nigeria as an example, the country has a large population base, 62% of whom are under the age of 25. About 40% of the population are urban dwellers, including a rich upper class and a growing middle class with considerable spending power. Nigerian consumption patterns are changing. People know and love fashion from their travels, social events and the media. The Nigerian fashion industry's growth potential is high, and with the right investment and support, it could become the engine of growth for the national economy. Organizations such as ECOWAS and the British Council have become involved in identifying young talent and empowering them with training and tours of fashion weeks in the United Kingdom and elsewhere.

The fashion industry has great potential. Lesotho, Kenya, Mauritius and Swaziland (in that order) are the leaders in textile and apparel exports. Fashion product exports as a whole are low, but countries such as Mauritius, Ethiopia and Ghana are launching more production hubs with the aim of supplying both internal African and Western markets. Mauritius alone accounts for 66% of African textile and clothing imports into South Africa.

According to Brown (2016), while many parts of the world were experiencing economic crises, Africa had six of the top ten performing economies with growth rates higher than those of developed countries. If these growth rates remain unchanged, consumers will buy US$1.4 trillion of goods and services by 2020, as per the World Bank projections for consumer spending. Currently, fashion represents an essential part of the industrial activity of Africa. Strong investment in the sector by international companies and intensive activity led by local entrepreneurs has enabled an important fashion industrial fabric to flourish.

In spite of the vast prospects, of the fashion industry in Africa, African entrepreneurs and local governments still face many challenges. One of the significant challenges is access to capital. The development of an industry that thrives and that produces products with high added value requires financing to start the business, innovate or train its workers. Investment both in machinery for product development and in ICT is required to favor the entrance of African fashion companies into the digital environment.

As we will see in Chapter 5, some supranational organizations, as well as foreign investors, are investing in the future of the African industry. But at local level, public and private institutions still need to contribute to the financing of local companies. If all African governments and other public and private institutions were committed to fashion industry development, the possibilities would be enormous. Indeed, it will take a joint effort to get the African fashion industry up to speed. All the organizations must work together to build more institutional capacity in the region, identify key trade policy issues that limit exports of textiles and apparel, and advocate for reforms that liberalize trade within the region, and with other countries such as the USA and the European Union.

The poor physical and technological infrastructure is another issue for the African fashion industry. As we shall see in Chapter 5, across most of Africa, infrastructural challenges such as lack of power, the high cost and poor quality of the internet, the lack of good road networks/access, low penetration of online payments and lack of logistics networks makes it more expensive for e-commerce companies to operate and compete with global counterparts.

The lack of an international presence is also significant for African fashion designers, who mostly find their fabrics, textiles and prints being showcased in the international market by Western designers. The promotion of African fashion outside Africa has begun to inspire interest in Africa and its propensity to produce quality brands, and for its potential from an interactive marketing standpoint. In 2015 Valentino launched a line inspired by African colors and designs. In 2009 Louis Vuitton launched a similar line for men using Maasai fabrics.

Finally, industry-related education is another major challenge. Specialized training in the fashion sector is essential, taking the sector's growth potential into account. For women this training is an opportunity to start a professional career, and in certain areas, it would offer opportunities for social and economic growth. However, none of the East African universities offer a fashion program because they do not see the need for it.

Africa's fashion industry needs traditional and digital promotional effort both within and outside the continent, strategic initiatives of mutual benefit to stakeholders, and supply chains and distribution networks that connect and inspire creativity and innovation. The creation of schools and universities offering specialized training in business management and fashion product manufacture, would alleviate the problem of the poorly qualified, especially female, workforce.

The two determining factors in the future of the African fashion industry are sustainability and the promotion of local entrepreneurship. So far the African fashion industry is in the hands of international fashion companies, who have found a source of quality raw materials and unskilled labor at low cost. The majority of small local businesses, therefore, are limited to the development of productive activities with little added value. This does not guarantee the future of the industry and with it the economic and social sustainability of the territory. Also, the high rate of extraction of raw materials and the high levels of pollution caused by the fashion industry—especially textiles—risk the environmental sustainability of the continent. The future of Africa lies in redirecting its industry in general, and fashion in particular towards the development of local industry, led by local entrepreneurs rooted in the territory, and also in the training of personnel and the development of sustainable practices.

Currently, the creation of value for the customer is the key to the commercial success of the products, and Africa has abundant resources for achieving this. African fashion products are widely valued for the quality of their materials and the originality or tradition of their designs. If to this we add a local industry that develops efficient and sustainable productive processes, and a skilled workforce capable of adding value, the textile industry's chances of success will be greatly increased.

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CHAPTER 5

Female Entrepreneurship in the African Fashion Industry: A Review of Its Determinants and Characteristics

Hashim Sabo Bello

1 Introduction

The modern economy is fast, dynamic and in a constant state of change. The critical challenge for entrepreneurial leaders is to respond rapidly to market change. Sustainability must act as the catalyst of organizational change that will guide their businesses to market leadership. Tastes and fashion are a prime example of the constant changes in society, and these include new trends such as a preference for sustainable products, or the collaborative economy. The intensive use of technology is another example, with omni-channel a common feature in today's markets. There is also the growing popularity of social media, especially among younger people, who use digital technology to obtain information, communicate and shop online, while older people will perhaps stick to their traditional methods of communication and purchase.

Figure 1 shows that the rate of internet penetration in 2018 in countries such as Kenya and Tunisia is similar to that of developed countries, reaching 70% of the population, while others such as Mali, Morocco or

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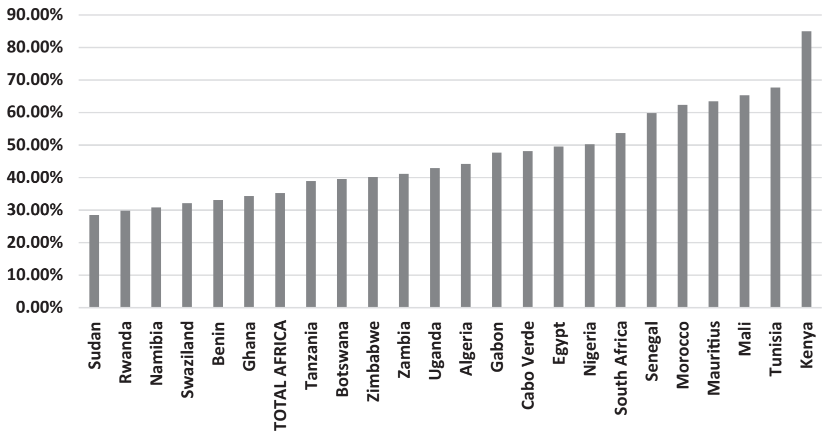

Fig. 1 Internet penetration in African countries, 2018 (% population) (*Source* Internet World Stats 2018)

South Africa exceed 53%. According to the Internet World Stats (2018), the internet adoption rate has been very high in Rwanda, Mali and Nigeria, exceeding 43% in the last ten years, while in other cases, the pace of adoption has been slow but constant, such as in South Africa or Tunisia, where it has not exceeded 10%.

The changes in society also take their toll on businesses and the people who lead them. Changes in social, economic and technological factors can impact a firm in many ways. We live in a world where technology is as accessible as drinking water, and nowadays we are unable to imagine living without it. In recent years, innovations in technology have allowed widespread access to information, making consumers more informed and demanding, but have also given them access to a global economy where they can buy a wide range of products and services quickly and at a lower cost. Since the 1990s, excess supply and better economic conditions have created a consumer society, where people seek personal satisfaction and love technology, and where their excessive consumption of natural resources has taken the planet to breaking point.

The cult of human power and blind adoption of technology has been a Faustian bargain, offering a wealth of benefits, but at the risk of losing our souls. We need to reject conceptions of the market that suggest all our problems can be solved merely by increasing the profits of companies and individuals. Nobody is suggesting a return to the Stone Age, but in order to preserve our heritage we need to slow down and look at reality differently. Most event businesses, for example, are products of strong-willed and ambitious social entrepreneurs who impact society with knowledge and experience gained from the products of modern technology. Leading social enterprises in Nigeria and elsewhere in Africa can strengthen African culture and heritage for future generations to emulate.

In 2015, trend hunter Li Edelkoort took the fashion industry by surprise with her Anti-Fashion Manifesto criticizing the unbridled production of fashion aimed only at profit. "Prices," she explains, "profess that these clothes are to be thrown away, discarded as a condom and forgotten before being loved and savored, teaching young consumers that fashion has no value. The culture of fashion is thus destroyed" (BusinessFashion.com 2017). Indeed, fast fashion has led to a situation where worker exploitation and the use of toxic pollutants are the norm. The cost of labor in countries such as China, Bangladesh and Cambodia accounts for less than 1% of a garment's retail value. While this may mean cheap clothing for consumers, the prices of the product are not always reduced, and it is the company that increases its profit margin. Meanwhile, fashion companies' workers must work long hours in harsh conditions to meet top production targets, only to be rewarded with extremely low wages (The Ground Up Project 2016).

In contrast, slow fashion, in all its stages, respects the environment and society. Not only does it value, care for and teach the people involved in the production process, but it also encourages conscious and responsible consumption among consumers. Today, slow fashion is gaining prominence thanks to a new generation of local entrepreneurs—mainly women—and sustainable craft workshops and sewing ateliers.

But small entrepreneurs and local businesses are only part of the solution. Big fashion companies also have to reconsider their business strategies. As social agents, international companies must offer value, both to the client through their products, and to society as a whole. In addition, their processes must be efficient, but also socially and environmentally sustainable. It must not be contaminated, but also it must promote the economic and social development of the territory. And in this sense, the international fashion companies have begun to act on two fronts: (1) enhancing the role of providers in the global value chain; and (2) supporting certain traditionally disadvantaged groups, such as women.

2 Women Entrepreneurs in Africa's Fashion Sector

As we have seen in Chapter 3, the African fashion industry has the potential to become one of the main drivers of the economy at no distant future date. Dressmaking is a significant activity anywhere in Africa, with local artisans acting as social agents in the development of African fashion. Their importance and impact on clothing production and local trends is to preserve traditional know-how, which needs to be taken into account in companies' business models. This can be achieved in two ways. The first is through local industry development creating jobs and training for local craftsmen and artisans and reducing unemployment in their communities. The second is empowerment, especially of women and young people, by including them in the companies' manufacturing teams. The major focus here is to provide continuous training to up-skill the craftsmen to be able to produce world-class products and increase their employability.

At present, the African fashion industry is a loose amalgam of worldwide designers, creative professionals, non-government organizations, small to medium-sized businesses—including craft workshops and sewing ateliers,—chambers of commerce and others who are interested in the formal establishment and successful promotion of the industry. While some African designers may achieve fame and success on the continent, the industry needs to act as a bridge so that buyers, the press, and fashion enthusiasts can discover them and increase the associated trade and investment opportunities (Brown 2016). In recent times, sales have increased for some African designers and brands, where their work has caught the eye of international actors, but most of the activity in Africa remains merely supply of raw materials and development of production activities for international companies in the sector.

Whether designers or workers in small craft workshops and sewing ateliers, the African fashion industry has historically been female dominated. According to the C&A Foundation Report (2017), female employment in the fashion industry in Africa is as high as 80%. This percentage is similar to that of other countries such as Bangladesh or Cambodia where the rate of female employment in the garment industry—one of the most important in fashion—is 80 and 90% respectively.

Most of them are women employed in small workshops and sweatshops, developing a knowledge-intensive activity. Although producing for some of the most profitable companies in the world, they are working under dreadful conditions for very low wages, and they have to do an excessive amount of overtime. For these women, personal development is closely linked to working conditions. It's not just about escaping from poverty, becoming more independent and growing as an individual—it's about decent pay, as well as dignified conditions, basic job security and even guarantees of future stability. They also want to ensure that it is they who will energize their homeland and guarantee its economic growth and social development.

Luckily, the interest in African fashion shown by some designers has opened up opportunities for some women in the sector. As entrepreneurs, they have not only created successful businesses at the international level, but they are also offering improvement and development opportunities for many other women who work in small local businesses. Max Osterweis, who along with ex-Gap designer Erin Beatty runs New York-based, Kenyan-made Suno, agrees with this idea. The primary goal is to make clothing desirable enough internationally to provide African designers and dressmakers with long-term employment. Sometimes, having famous clients—such as Michelle Obama or Carol Lim who are regular customers of African fashion—helps increase the recognition and prestige of the African fashion industry internationally. At other times, the connection between local producers and big brands is favored by organizations such as The International Trade Center. Helping to connect such projects with more prominent brands is the Ethical Fashion Programme of the ITC (The International Trade Centre, a joint agency of the World Trade Organization and the United Nations). Run by Simone Cipriani, the program aims to provide long-term employment under certified fair-labor conditions for artisans working in impoverished areas (*The Financial Times* 2017).

International fashion companies are aware of the benefits of working with African suppliers. Luisa Laudi, creative director of MAX & Co., a Max Mara Group brand aimed at younger customers, says: "Working with Kenyan craftswomen in the slums is complicated and not like producing accessories in Italy, but this is not charity…. The accessories are great and in line with our production standards." However, the risk is always present, no matter how high the quality of the products manufactured. Thus, when international fashion companies fail to look after their suppliers, the results can be highly damaging. In some cases micro-producers have abandoned their own cottage industries to work with outsiders, and if this work dries up, they have lost the little they had before. The result is brutal. They starve.

Another African woman icon making significant contributions to the African fashion world is Honey Ogundeyi, the founder of Fashpa. This company is using technology to create an online one-stop fashion shop. Fashpa.com is Nigeria's premier online fashion retailer. Vertically integrated Fashpa designs, manufactures and distributes its own clothing line. Ogundeyi acknowledges that starting a business, especially in Nigeria, is challenging, but she also agrees that companies have a chance to grow if the entrepreneurs are astute, passionate and creative.

Honey Ogundeyi is a model in the race for female entrepreneurship. She has always had a passion for both technology and fashion, so she eventually decided to work on an idea she had been passionate about for a very long time, and that was how to make fashion more accessible for Africans. Interestingly, Nshe (2016) suggests that Honey Ogundeyi started Fashpa (meaning Fashion Parade), out of frustration at not being able to access quality fashion following her move back to Nigeria after several years living abroad. She realizes that Africans have the same modern, sophisticated tastes and love for fashion as consumers elsewhere in the world. The only difference is that the developed-country consumer has access to fashion, while the African consumer does not. According to Nshe (2016), "she wants to bridge that gap using technology, by creating an online fashion platform targeted at style-conscious consumers who wanted quality, variety, and convenience, at affordable prices". Thus, the idea of solving the problem of access to fashion has evolved into a powerful business model that offers a new solution. Currently, Fashpa is a marketplace retailer that produces its own line, like Zara, H&M, Steve Madden, Topshop and a few others.

Female entrepreneurship in African countries is a proven fact. According to the World Bank, Africa boasts the highest growth rate of female-run businesses in the world (Meunier et al. 2017). Similarly, the Global Entrepreneurship Monitor (GEM) 2016/17 Women's Report shows women's entrepreneurial activity in Africa rose by 5 percentage points over the year (GEM 2017). Countries such as Uganda, Senegal and Botswana have female entrepreneurship as high as 34% (WEF 2018), exceeding the percentages in the United States, Russia and New Zealand.

The data show that 61.8% of the African women entrepreneurs said they started a business because they were taking advantage of the opportunity, rather than out of necessity (GEM 2017). However, the report also shows that sub-Saharan Africa has the highest discontinuance rate—at 8.4%. Around 56% of women entrepreneurs in the region cite either unprofitability or lack of finance as a reason for closing down their business.

Indeed, the World Bank report points out that despite the increase in the percentage of activity, to be an entrepreneur is difficult for women, who have to face social and financial, barriers. In contrast to the GEM data, the World Bank report shows that a significant proportion of the women who have started their own entrepreneurial activity indicate that they do from family necessity. Nevertheless, according to Donna Kelly, entrepreneurship professor at Bobson School, whatever their reason for being an entrepreneur, what is certain is that women entrepreneurs provide incomes for their families—in many places they are the only source of family income—and also employment for those in their communities, and products and services that bring additional value to their environment.

3 Drivers of Female Entrepreneurship in Africa

Evidence, research and experience have shown that there is a strong tradition of craftsmanship and textile heritage and an emerging cadre of designers and entrepreneurs in the fashion space, coupled with a lack of penetration by foreign clothing brands. Fashion industry activities are concentrated in notable cities and countries. Lagos (Nigeria) and Nairobi (Kenya) in particular are witnessing a booming fashion scene and widespread interest in clothing. African fashion is significant because some of the countries are so large. For instance, Nigeria, one of the "African Lions" alongside Kenya, Ruanda and Mozambique, is one of the most developed countries in the fashion industry. These and other markets, such as Cote d'Ivoire, are expected to see a significant growth in the numbers of high net worth individuals in the near future, a trend that promises well for the fashion industry.

Women constitute more than half of any African country's population. In most countries, however, women are central to the development of the national economy, contributing more than men towards the value of recorded production both quantitatively in labor force participation, and in educational achievement and skilled manpower (Lawanson 2008).

Traditionally, African women are seen as home-makers, who oversee and coordinate household affairs and activities at home. With the advent of Western education, industrialization and paid employment, men as well as women have joined the labor market. Today, there are visible changes in the perception of women, mainly because they have greater opportunities for education than before. As Anarah et al. (2017) evidence, they are forming various organizations that fight for women's independence and empowerment, claiming equal rights and opportunities in all spheres of life.

In recent years, women have assumed a vital role in the development of entrepreneurial activity. According to Singh et al. (2011), an entrepreneur is a person who has ideas and personal goals and the ambition to start a new enterprise, as well as bringing capital, skilled people, equipment and facilities to the new business.

The scientific literature does not clarify the influence of gender on the development of entrepreneurial activity. Neither Beraza Garmendia and Rodríguez Castellanos (2012) nor Parker and Van Praag (2012) identify important differences in characteristics and type of address according to gender. These authors show that some entrepreneurs' socio-demographic and psychological characteristics influence their ability to recognize and develop opportunities and to set up a business with the potential to succeed. Regarding socio-demographic profile, Parker and Van Praag (2012) identify two characteristics that determine entrepreneurs' capacity to manage business growth: professional experience and academic education/training. Jo and Lee (1996) and Chandler and Jansen (1992) show that prior experience in directorship posts or experience gained through prior entrepreneurial processes determines outcomes. When entrepreneurs have greater experience, they possess more information about the problems and obstacles they are likely to encounter in the first few years of a firm's life; they have also acquired more problem-solving knowledge.

Similarly, entrepreneurs' level of education/training affects their capacity to adapt to the different activities required of an organization and to handle the risks associated with them. Parker and van Praag (2012) recognize that when a person can demonstrate a higher level of education/training, their greater formal knowledge improves organizational performance. However, it is also necessary to underscore the need for both technical and specialized management education/training. Jo and Lee (1996) warn that when the entrepreneur knows about the firm's product or service, the firm gains a greater marketing advantage because it offers a technically superior product. Management knowledge and skills are also key, in that they help identify business opportunities and establish the right combination of resources and capabilities in the organization to develop and exploit those opportunities (Cavusgil and

Knight 2015). Finally, we note that certain characteristics of the entrepreneur's personality help determine firm creation and growth. The literature identifies creativity, intuition or ambition, together with control capability, risk propensity and the need for recognition (Lee and Tsang 2001). In entrepreneurship, these factors tend to translate into a positive attitude—or propensity—toward organizational growth. This type of behavior is a particular feature of innovative technology firms because the risk and uncertainty inherent in them require a creative, adventurous kind of entrepreneur in search of growth opportunities (Beraza Garmendia and Rodríguez Castellanos 2012).

On the other hand, Alti and Ahmed (2016) point out some differences between women and men entrepreneurs. According to Brush et al. (2009), cited in Alti and Ahmed (2016), businesses owned by women are one of the fastest-growing entrepreneurial populations in the world. Galewood et al. (2003), cited in Alti and Ahmed (2016), assert that in the USA, the ability of women entrepreneurs to achieve firm growth and attract venture capital has now become so important that it is a topic for systematic research (OECD 2004). They make a significant contribution to innovation, employment and wealth creation in all economies. Their efficiency and productiveness in entrepreneurship are made possible by the fact that women, by their nature (Rosener 2011):

1. have creative ability;
2. are blessed with the ability to persist and pursue their desires;
3. are patient nurturers of children, a tenacity that is usually transferred into business;
4. are good innovators;
5. have the ability to develop passion for what they believe in;
6. possess managerial skill—every woman is a manager. Women are innately skilled managers because of their peculiar nature as home-makers; and
7. are reliable and responsible regarding financial record-keeping.

According to Sarri and Trihopoulou (2005), some of the key personality traits that women entrepreneurs should have are:

1. A vision of the future: Women entrepreneurs have an idea of what the future could be like for them and their businesses, but also, more critically, they are willing to fight to achieve their dreams.

2. Love/passion/devotion: women entrepreneurs love what they do, and it is this passion that sustains them and makes them not give their dreams up when the going gets tough. These feelings also give them the impetus to be involved in daily activity, increasing the value of the products they sell.
3. Determination: they implement their ventures with total commitment. They seldom give up, even when confronted by obstacles that seem insurmountable.
4. Proactiveness: women entrepreneurs seem to be practical about business. Some African fashion companies are at the forefront of retail transformation in Africa, using market data to market innovative strategies and offer sophisticated and appropriate solutions to consumers' needs.
5. Willingness to take risks and the ability to manage risks/tolerance of ambiguity/thinking outside the box: women entrepreneurs leverage their first-mover advantage, their innovative business model and their relentless focus on the customer experience, with access to the right funding.
6. Long-term thinking: critical thinking about the entrepreneurial break. For instance, some African fashion companies like Fashpa base the success of their business model on data mining or mobile commerce.
7. Destiny: they want to be in charge of their own destiny rather than dependent on an employer.

These traits have led a growing number of women entrepreneurs to realize their dream of starting up and running their own enterprise. They are local heroes who today are re-shaping the African local economy, creating jobs, wealth and sustainable livelihoods, and reducing poverty.

4 Young Women Entrepreneurs in the Africa Scenario

Entrepreneurship is a personal journey where entrepreneurs learn a lot about themselves, business, teamwork and the fine art of balance. In today's fast-fashion world, young women entrepreneurs are adding value to the entrepreneurs' network. Women entrepreneurial spirit in Africa is centered on two fundamental pillars: (a) social entrepreneurship that is critical to collective success; and (b) intensive use of the digital environment as a communication, dialog and relationship channel.

Annan (2010) believes that social entrepreneurship is founded on the principles of private initiative, entrepreneurship and self-employment, underpinned by the values of democracy, equality and solidarity, and that the co-operative movement can help pave the way to a more just and inclusive economic order. Social entrepreneurship may be seen as merely combining commercial enterprises with social impacts. According to Pozen (2008), a social entrepreneur is a pragmatic visionary who achieves large-scale, systemic and sustainable social change through their unwavering belief, driving passion and dogged determination. The power of social entrepreneurship to alleviate social problems has been generally accepted by policymakers and political leaders as an essential mechanism in addressing the need for societal change. But young women entrepreneurs in the fashion sector also use the internet and social networks as a communication, dialog and relationship environment (Duffy and Hund 2015). They can use these technological tools efficiently and economically, to reach out to their target global customers. An essential part of their activity has a digital base, and social networks are used as the main channels of their marketing communications. Some of the central value-creation activities they develop—including communication with suppliers and retailers—are also carried out on the network (Payne et al. 2008).

A quarter of young people in Africa are out of work and not in education, and the majority are women. Encouraging entrepreneurship and promoting social enterprise can help to address some of the continent's development challenges.

What separates real entrepreneurs from dreamers is that they do not hesitate when it is time to act, and they do not retreat when it is time to press forward. Among the African women entrepreneurs who moved from idea to enterprise is Bethlehem Tilahun Alemu, founder of soleRebels, one of Africa's fastest-growing footwear companies. African women have always had enormous talent for design and production, but it was invisible before the appearance of entrepreneurs like Alemu. She built up her company and turned it into an international brand, using traditional spinning techniques but in a modern way. Today the company has 120 workers manufacturing its products in Ethiopia.

As Toesland (2016) points out, this philosophy exemplifies the modern African fashion industry's outlook: sustainable, business orientated and employing traditional African production techniques and styles. Among famous fashion designers who have creatively used beads and sequins on traditional gowns, blouses and skirts that are now popular both nationally and internationally are Frank Oshodi, Lanre da Silva Ajayi, Deola Sagoe, Ohimai Atafo (Mai Atafo), Ngozi Cardow (Zizi Cardow), Uduak Umondak, Folake Folarin Coker (Tiffany Amber), Lisa Folawiyo (Jewel By Lisa), Omoniyi Makun (Yomi Casual Clothing) and Mudiaga Enajemo (Mudi).

Fashion has a wide range of meanings, as it refers to what most people wear or should wear (clothes, shoes, belts, hats, bags, etc.) in a society, as well as the way these products are designed. The term "fashion industry" refers to all aspects of fashion: design, fabric production, marketing and education. When in full bloom, the fashion industry is expected to have professional designers, models, modeling agents, dressmakers, fashion photographers, fashion schools, fashion retailers, fashion journalists and magazines all successfully operating (Gbadamosi 2016).

A case in point is the entrepreneurial fashion activities of Toyosi Akerele. In 2007 she was selected as one of 101 Young African Leaders by the African Business Leaders Forum of *Business Magazine*. Currently, she is a successful entrepreneur and consummate young professional. But one of her main characteristics is her extensive academic training. She holds a bachelor's degree in civil law from the University of Jos, a certificate in youth inclusive financial services from the University of New Hampshire, Durham, USA, a certificate in media enterprise from the School of Media Communication, Pan African University and an executive master's certificate in project management from the Project Management College, UK (Proudly Nigeria 2015). She is the founding executive director of Rise Networks, a Nigerian social company that is actively involved in national and international projects about the need to provide a platform for youth inclusion in policy formulation and implementation. Toyosi has conceptualized and designed effective programs to deepen the links and learning opportunities for young people in knowledge acquisition, enterprise and nation building. The Rise National Youth Forum, the flagship project of Rise Networks, has attracted hundreds of thousands of young people in over 20 Nigerian states in the last five years (Proudly Nigeria 2015).

Another example of young women's entrepreneurship in Africa is Nkechi Iheanacho, an industrial chemistry graduate who is Managing Director of Pink and Blossom. Iheanacho always loved to organize and started her business as an off-shoot of her sister's wedding, when she not only did the traditional wedding catering but also arranged the decorations and ancillary services including the white wedding. After the wedding people started making inquiries about the organizer of the event, but it took quite a while to convince some of them that she had handled it. Those who did believe in her encouraged her with jobs such as birthdays and end-of-year parties. She says:

> I didn't look for start-up capital because my initial clients paid up front, so I can say that I started with zero capital. My drive and love for putting things together kept me going. At the initial stage, I had no steady staff. I only used ad hoc staff, but now as a full-fledged event management company, I have at least 15 permanent staff. I engage ad hoc staff if I get several jobs at the same time or a huge job because sometimes I have as much as 30 people working on a project…. I have never had any problem paying my staff, from nothing we have grown to pick up jobs of over a million naira and our balance sheet is good. When we get jobs that require for instance a marquee we outsource some of the engineering, electrical, plumbing jobs and concentrate on our core competence which is food and decoration. (Iroegbu-Chikezie 2015: 35)

In the midst of today's economic development, the growing spirit of young women's entrepreneurship offers a ray of hope for jobs and livelihoods for most African countries. The most significant economic development spirit in today's world is the spirit of entrepreneurship.

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CHAPTER 6

Challenges and Opportunities for Women Entrepreneurs

Carme Moreno-Gavara, Ana Isabel Jiménez-Zarco and Sheriff A. O. Alabi

1 Introduction

The pay-offs for promoting female entrepreneurs in the developing world are very high. Supporting women to start and grow their own businesses enables progress on many essential fronts including promoting economic development and household welfare, championing diversity, and promoting the goal of women's empowerment globally.

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However, for women to launch and successfully sustain entrepreneurial activities remains a daunting challenge, even in the fashion sector. There is ample statistical evidence to show that of all small businesses in the world, only one-third are run and owned by women.

Theoretical and empirical evidence clearly points to the challenges facing female entrepreneurs in accessing capital (Moreno-Gavara and Jiménez-Zarco 2015; Joireman 2008). Funding is, of course, a very significant challenge; a staggering 70% of female-owned small enterprises in developing countries do not have access to financial institutions (Dary and Haruna 2013). Although this is a universal issue in the context of the promotion of and support for female entrepreneurship, it is of particular concern in Africa where women entrepreneurs traditionally have little or reduced access to financial markets, due in part to their traditional engagement in survivalist activities such as sewing cooperatives and ateliers, chicken farming, candle-making, gardening, or arts and crafts.

However, despite women entrepreneurs' strong contribution to the rural economy, according to the GEM report (Monitor 2015), Africa leads the world in the number of women starting businesses. Women entrepreneurs make a great contribution towards economic development, and their small businesses play an important role in stimulating economic activity, creating jobs, alleviating poverty, uplifting living standards and promoting sustainable livelihoods (Van Vuuren and Groenewald 2007). There is a general belief that the twenty-first century is Africa's century of growth and that its economic future will be underpinned by the extent of the role and the success of women entrepreneurs in the continent's economy (Maleko 2008).

According to some experts at the World Economic Forum and the World Bank, there is evidence to suggest that the future successess expected from African women entrepreneurs could be at risk if the current known challenges remain unresolved, and this in turn could threaten to stifle innovation and slow the growth needed to propel their businesses and local economies. Botha (2006) shows that in addition to financial problems, African women face other critical obstacles which inhibit entrepreneurial efforts. Frequently, women do not have the same developed networks of business partners, they do not have access to customers, and in some cases there are instances of legal discrimination (Chinonye et al. 2015). Women also have unequal access to business education and management training, with the consequential lack of relevant small-business management skills (Botha 2006). Furthermore, they carry the additional burdens of unpaid work looking after children and providing care for elderly family members, making maintaining a healthy work–life balance rather daunting. Garba (2011) shows that in many developing countries, the loss of jobs for the menfolk resulting from the increasing economic downturn makes women assume the responsibility of keeping the family through the development of small-business activity.

Public and private organizations, both local and international, have become aware of the challenging situation faced by female entrepreneurship in Africa. There has been a recent focus on making additional business support initiatives available to enable women to overcome these difficulties and undertake successful business activities. But above all, these programs seek to give African women increased visibility in their chosen areas of enterprise, to empower and endow them with autonomy and decision-making capacity.

In this chapter, we will endeavor to highlight the main challenges which the literature observes concerning entrepreneurship by women in Africa. We review how some local and international initiatives can help address these challenges and support female entrepreneurs in African countries, with a particular focus on the fashion industry, an economic sector that has grown intensively in recent years.

2 Challenges for Women's Entrepreneurship

Nowadays women undertake enormous range of tasks, roles and responsibilities in contemporary families, societies and national affairs. Although they represent about 50% of the world population, in many places they are excluded from opportunities to grow and develop, socially or economically.

If in developed countries there is talk of "gender inequality", of the wage gap between men and women, or of the "glass ceiling" in the case of barriers for female entrepreneurs, the situation is much worse for women in Africa, who have little involvement in key decision-making—a role that is traditionally assumed by men. Millions of African women today still face multiple barriers simply for being a woman: social norms, beliefs, laws and different types of discrimination that must be overcome at every stage of their lives, and that prevent them from advancing, developing and participating in society, as well as enjoying their rights as citizens. For women who also live in situations of poverty, vulnerability and social exclusion, the list of obstacles is worse, and greater efforts must be made to overcome them.

Reports by international institutions such as the United Nations Development Program have revealed this situation. The Human Development Report (HDR) prepared by the UNDP introduced three new indicators: the Human Development Index adjusted for inequality (IDH-D), the Gender Development Index (GDI) and the Gender Inequality Index (GII). According to data from the HDR (2018), the world Human Development Index (HDI) has dropped from 0.68 to 0.52, that is, globally HDI has changed from high to medium. The losses are more pronounced in countries with greater inequality such as Mozambique (45%), Namibia (44%) and Central African Republic (42%). Women also have a lower HDI value than men across regions and face particular barriers to empowerment throughout their lives. The GII is a parameter that measures the differences in the distribution of achievements between men and women. According to this report, of the ten least equal countries in terms of gender, eight belong to the African continent. Finally, GII captures the inequalities women face in reproductive health, education, political representation and the labor market. The higher the GII value, the greater the gender inequality—and this is seen in all countries. In 2017, the value of GII was 0.441. Among developing regions, the GII value ranges from 0.270 for Europe and Central Asia to 0.531 for the Arab States to 0.569 for sub-Saharan Africa (United Nations Development Programme 2018).

This reality is more than evident at the business level where women experience various barriers to starting up a business. Curiously, however, international organizations recognize that women's situations have changed and they increasingly contributing to their communities' economic and business sustainability. According to Iyiola and Azhu (2014), "women entrepreneurs contribute numerous ideas and a great deal of energy and capital resources to their communities and generate jobs as well as create additional work for suppliers and other spin-off business linkages". In recent years, their contributions have been even higher. The economic downturn has resulted in the loss of jobs for the men and women have assumed the responsibility of maintaining family stability through the development of a small professional or business activity (Garba 2011).

The main barriers to female entrepreneurs are observed in aspects such as the lack of professional qualifications and business skills, access to funding, or difficulties accessing professional networks. Finally, some authors like Chinonye et al. (2015) point out the existence of other barriers of a cultural or social nature, legal discrimination (e.g., lack of rights of access to or ownership of land), and the role that women occupy at the family level in terms of their responsibility for the care of children and the elderly.

2.1 Problems of Access to Education and Training

Education is an essential tool in the fight against poverty. It has been shown that societies with higher education indices are more prosperous economically. Despite significant improvements in education during the present century, Africa has one of the highest illiteracy rates in the world.

This situation is due to low levels of school enrolment, high rates of school drop-out and barriers hindering women's access to secondary and university studies. According to data provided by UNICEF (2013), there are 49 million school-age girls in Africa not attending primary and secondary school. It has also been observed that only 34% of girls finish high school. On the other hand, it has been proved that when the mother has access to education and is literate, her children are more likely to complete their education. The lack of training raises female unemployment rates in the population, and relegates them to low-skilled jobs, without adequate security or formally recognized labor rights.

But this lack of training also hinders the development of future learning processes, in such a way that the acquisition of knowledge related to training in different professional and business areas becomes more expensive. Thus, simple but essential tasks in the development of business activity, such as the use of a mobile phone, access to the internet or preparation of a budget become challenging for these women.

2.2 Difficulty in Accessing Finance

The wage gap between men and women is a reality in developed countries, but this phenomenon increases significantly in African countries. The report presented by Ipsos (2016) notes that the gap between men and women is widening and, for example in countries like South Africa, a woman earns half as much as a man.

But financial problems also affect women entrepreneurs in the countries of the African continent. Access to funding sources is a constant problem among women entrepreneurs. According to the magazine *Forbes* (2017), "female entrepreneurs receive less than 3% of all venture capital funding", and in some countries, this gap is widening (Witbooi and Ukpere 2011).

It is difficult to find Africa-specific explanations for this, but it is true that some of the causes identified for developed countries can equally apply. Thus, the absence of training or the supposed lack of commitment that a woman has with regard to a business project, generates distrust among investors. To this, we must add the legal obstacles that African women face when developing financial arrangements (such as the lack of collateral or other assets), making it practically impossible to access specific sources of financing.

Finally, both Witbooi and Ukpere (2011), have pointed out that women show greater risk aversion than men, which makes them more conservative than men when it comes to seeking financing. However, it should be noted that the type of company that women entrepreneurs create is small and that they usually develop activities with low added value, so that the company's profitability is low, and therefore has little attraction for potential investors.

2.3 Social and Cultural Traditions as Barriers to Women's Entrepreneurship

Among the obstacles to female entrepreneurship are the lack of access to networking, legal discrimination and the role of women in the family. But, although these may seem unconnected, it is true that they have a common bond, the social and cultural traditions that prevail in Africa.

In a society where women have traditionally occupied a secondary position, it is normal that there are laws discriminating against them and limiting their rights. It is common to find situations where women need permission from their husbands to (a) sign a contract, as in Guinea, Niger or Mauritania; (b) open a bank account, like Chad or Congo; (c) apply for a passport, as in Egypt, Sudan or Cameroon; (d) run a business, as in the Congo; or even (e) leave the country, such as in Sudan. In other countries, it is also impossible for a woman to be the head of a family, as in Chad, Morocco, Rwanda or Senegal. In some cases, they cannot choose where to live, as in Rwanda, Senegal, Niger or Mauritania.

Lack of access to services and the lack of decision-making power within their homes and communities appear to limit their capacity for action. It is evident, then, that opening a business can be a challenge for an African woman, since, in addition to the lack of guarantees, a national identity card, access to specialized training in many countries, and the support and approval of their husbands are required. This fact explains why women in Africa receive less than 10% of credit. Lack of access to financial services prevents them from applying for a loan to create their own businesses, which severely limits their social and economic development. Finally, it should be noted that restrictive legislation limits the ability of women to establish relationships with people outside their environment, so in practice to improving their business networking skills is challenging.

3 Domestic and International Support for Women's Entrepreneurship in the Fashion Sector

In global economic terms, the importance of women's entrepreneurship is high. However, the implementation of programs and initiatives aimed at promoting their activity is quite a recent phenomenon. An essential part of these initiatives is aimed at favoring the empowerment of women in the field of the company in general, and the fashion sector in particular.

However, women entrepreneurs can reinforce and improve their position in the African fashion sector by taking advantage of other initiatives, although they are not defined as "gender issues". Africa's current situation makes it necessary to rethink its growth strategies and find ways and means to make them more compatible with the object of sustainable development. As we saw in Chapter 2, companies' sustainable orientation favors the economic, social and environmental development of the territory. But it also offers them the bases of competitive advantage due to increased consumer value delivery.

This is why, alongside actions aimed at empowering women and encouraging entrepreneurship in the fashion sector, Africa must also consider those that favor the development of sustainable processes and products in the industry's companies. Sustainability is a source of competitive advantage, offering extraordinary opportunities for improvement in a sector where an important part of the activity is developed by women. An essential part of these initiatives is developed directly by supranational organizations, such as the United Nations (UN) or the World Bank. Using their contribution, mainly financial, these organizations support initiatives by governments, organizations and companies destined to favor start-ups and new entrepreneurial activities promoting the economic and socially sustainable development of the region.

At a slow but steady pace, domestic public and private organizations have become aware of the need to undertake significant economic and social reforms to achieve sustainable growth over time.

African countries have grown at a very rapid rate since 2000, which has allowed them to achieve improvements in several areas such as international trade and investment, mobilization of government revenue, infrastructure development and the provision of social services. However, despite the progress that has been made by the region over the last eighteen years, the current pattern of growth is neither inclusive nor sustainable.

At the economic level, there are some reasons for this situation An UNCTAD (2012) report suggests that the current pattern of African countries' growth is not correct. First, they are heavily dependent on natural resources as drivers of their economic growth. But most of these resources—fossil fuels, metallic and non-metallic minerals—are non-renewable and are being depleted at a very rapid rate, and with negative consequences for future growth and sustainability. Second, their economic growth has been accompanied by deindustrialization and the five-point fall of manufacturing's share in Africa's gross domestic product (GDP) in 2008. Third, Africa has experienced rapid urban growth, without industrialization supported by industry-led agricultural transformation. Cities can absorb labor force moving from rural to modern urban sectors of the economy. But agricultural output and productivity per capita in the region are still low compared to the global average, which has dire consequences for food security and social stability.

The current pattern of Africa's economic growth is particularly worrying considering its social implications. The region has a young and growing population that, according to United Nations Population Division, will account for about 29% of the world's population aged 15–24 by 2050. An abundant labor supply with much creative potential presents significant opportunities. However, the current growth model is forcing African countries to look at engagement with other new growth paths that can generate quality jobs and absorb the entire labor force on a large scale. In particular, they will need to move away from jobless growth strategies, and towards inclusive growth paths that are labor-intensive and create learning opportunities for young people, and other socially excluded collectives such as women.

Women have an essential contribution to make economic growth, especially in sectors such as agriculture, or textiles and fashion; hence their latent interest in promoting a number of key initiatives aimed at developing and supporting their local business financing space—albeit with international financing support—which are intended to encourage the formation and development of entrepreneurial activities among women.

Participation in the African fashion industry[1] has traditionally attracted the most significant number of women entrepreneurs. However, in light of the data that is available, it seems to be a sector in which women entrepreneurs receive less attention from governments and local organizations. It is relatively complicated to find domestic initiatives that encourage training or fund the start-up of small businesses or women's cooperatives in this activity. As can be seen, most of the efforts of local entities and organizations focus on the training and development of tech entrepreneurship, since to a large extent it is one of the activities that provide the most significant economic value to the countries on this continent.

In previous chapters, we saw that currently the leading companies in the world of fashion are concentrated in Europe, the USA and China. Following a decentralization strategy, they have specialized in value-added activities, such as design and marketing, and have outsourced those other productive activities with lower added value, such as manufacturing. Many of these companies have found reliable, credible and good-quality sources of raw materials as well as a cheap labor force in several African countries, in such a way that for their own economic interests, they have favored the development of the flourishing and productive industry of the fashion on the continent. It is equally true that the activities developed in these countries provide low value added; therefore, it is understood that the interest shown by governments and local organizations is at a low level; in other words, the African fashion industry is not perceived as a potentially high growth sector. But we must also consider that this industry employs mainly female labor, so it not only: (a) favors women's employment and entrepreneurship, contributing to the insertion of an important and, until recently, forgotten part of the population, but also (b) contributes significantly to the social and economic development of some rural regions of the continent.

[1] In this manual, the Fashion sector is understood in broad terms and includes activities developed in the textile, accessories, footwear, and even crafts.

Perhaps this fact explains why an essential part of the programs and initiatives aimed at the development and empowerment of the fashion industry in Africa are international. It is understandable that fashion companies invest resources in promoting the development of companies led by women in Africa since the investment in training and machinery guarantees both an improvement in the quality of the final product, and a reduction in costs, by achieving economies of scale and experience. But it is understood that the development of an industrial fabric in the fashion sector, not only contributes to the economic and social improvement of African countries but also contributes to achieving the third objective set by the UN about promoting equality between the sexes and the empowerment of women.

As can be seen in the following section, since the end of the last century, international support for women's entrepreneurship in Africa has been elevated. Supranational organizations such as the UN or the World Bank finance projects aimed at the integration of women into the economic, social and political spheres of their countries. Other social actors such as governments, NGOs, companies and academic institutions have also begun to develop actions aimed at supporting female entrepreneurship, especially in sectors such as fashion.

3.1 Domestic Support for Women's Entrepreneurship in the Sustainable Fashion Sector

The critical role of female entrepreneurs in economic development has made domestic governments aware of obstacles women face when it comes to starting, growing and sustaining enterprises. That is because local governments, together with other social agents, such as private organizations and universities, promote initiatives and programs that proactively support female entrepreneurial activities, through womens' capacity building in skills, access to ICT or financial resources (Mumba 2014). It should be noted that an important number of these initiatives seek to promote women's entrepreneurship in sectors like fashion, agriculture, retailing or tourism where they can make sustainability a competitive advantage, maintainable internationally (Leke et al. 2010).

One element to be highlighted is that the initiatives developed are aimed at different stages of the life cycle of the entrepreneur project. Thus, some of them are aimed at women who have not yet started their business, while others seek to support those women who are in the early stages of the life of the company. On the other hand, it is worth pointing out that among the initiatives and programs developed, very few are especially aimed at female entrepreneurship in the fashion sector, especially as regards higher education training programs.

The education and training of entrepreneurs are one of the main objectives of the programs and initiatives developed to promote women's entrepreneurship, especially in sustainable production activities. Botha et al. (2006) provide evidence that "one way to enhance the entrepreneurial activity in a country is by providing entrepreneurial training and education to potential and existing entrepreneurs". Mostly, these initiatives seek to professionally train women in the sustainable development of specific tasks such as sewing, gardening, crafts or food processing. Despite being traditional activities in the area and usually developed by women, these programs intend to increase women's autonomy and independence. By providing them with skills and resources, the initiatives aim to improve their professional expectations, but also favor inclusive growth and poverty reduction in their environment, since they will have some of the resources needed to deal with complicated family and social situations.

Sometimes, training initiatives are accompanied by other support programs, which at the same time provide new resources for women and the community in general, relieving them of part of their family, economic or social burden (Garba 2011). I An example is the initiative developed in 2011 by **NGO** Kelele Africa in the Kasenda and Kimya areas of Uganda.

The project began in 2011 with the construction of a sewing atelier equipped with 15 sewing machines, a monitor, and the necessary tools and fabrics for the start-up of the workshop. To provide the economic and material resources required to develop the activity, the NGO launched a six-month training course 12 students. On completion of the programme participation, the best student is given a sewing machine and the opportunity to join the sewing workshop professional team which has been created with the best students from each course group (Kelele Africa 2018). Complementing the project is a programme at the school next to the sewing workshop, where the NGO volunteers work with children, teaching them English, painting during the mornings and doing crafts and games in the afternoons. Currently, the project is self-sustainable, and a total of 76 women and two men have completed the training cycle.

Training in aspects related to entrepreneurship and business management is another goal to which a large number of public and private organizations devote significant efforts. Carter (2000) suggests that widening access to business start-up and growth training and advice in business subjects, is the only way to encourage a more significant number of women into self-employment. However, entrepreneurship and business training are in demand not only by potential entrepreneurs, but also by women who have already started in business.

Nowadays, many women entrepreneurs lack management experience and access to networks. And, although education is not mandatory for new venture creation, they have a greater need for ongoing support, so providing them with skills, contacts and opportunities is vital for most successful businesses. Henry et al. (2005) and Botha et al. (2006) show that "entrepreneurship training can complement the early stage awareness-raising function of entrepreneurship education, as it provides the more practical skills that entrepreneurs require when they are ready to set up their business".

Among the many programs implemented by public and private organizations are the Soronko Academy experience in Ghana in 2015, and the Women Entrepreneurship Programme (WEP) of the University of Pretoria (UP) in 2006. Since 2015, the Soronko Academy has run the Tech Needs Girls project in eight regions in Ghana. This mentoring program was initially intended to teach young girls (from 6 to 18 years) to code and create technology. But the initiative has now been extended to adult women and would-be entrepreneurs, to ensure the sustainability of the coding skills, but also foster the acquisition of other skills such as creativity, problem solving and critical thinking.

According to Botha et al. (2006), the WEP is a training intervention specifically designed and delivered for women, by women. The program has focused on the training needs of potential, start-up and already established women entrepreneurs, and it was designed after a study conducted by the UP between 2002 and 2003 on the constraints on women entrepreneurs' access to finance. Analyzing the conclusions of the study, the author suggests that: "women-owned businesses were generally less competitive and less equipped to present convincing business proposals to the financial institutions. But also, the growth of these businesses was very limited and failure rates high".

Further, this author notes that South African women in particular, experience real difficulty gaining access to financial markets. In a discussion about gender discrimination, y he states: "the barriers to accessing finance could all be related to the patriarchal South African legal framework, the socialization process that is limiting in scope." The WEP offers a one-stop solution that seeks to improve financial service delivery and access to markets for growth-orientated women-owned small and medium-sized enterprises (SMEs). This training program promotes integral women's participation in the economy, especially in those activities that can facilitate the sustainable growth of the country (Bridget 2017). Integrating personality profiling, business planning training, coaching, access to business networks and finally, access to markets and finance shows that women entrepreneurs can conduct business on their own and become financially independent.

Mumba (2014) shows how the government of Zambia has introduced some programs to increase women's economic empowerment. The first, The Women's Empowerment Program,—supported by the Ministry of Community Development, Mother and Child Health—attempted to facilitate the provision of energy-saving technology, training for women entrepreneurs and start-up capital. The program was implemented in 2010 in all the districts of Zambia, but was poorly received, and in the three years following its introduction, only 2528 women out of the entire female population of the country received support (Ministry of Community Development, Mother and Child Health 2014).

Another initiative introduced by the Ministry of Community Development, Mother and Child Health, was the Women's Clubs. This project also aimed to support women forming businesses and accessing technological resources. The women's clubs were involved in various income-generating activities, some of which related to fashion: dressmaking and design, trading (buying and selling) and handicrafts. And according to official data collected by the government in 2010, there were 1279 funded clubs, with about 25,920 beneficiaries (Ministry of Community Development, Mother and Child Health 2014). However, the program results were not as positive as the Zambian government had hoped.

On the one hand, access to that kind of support and the resources available are not sufficient to cater to the needs of a large number of existing women entrepreneurs, as well as prospective entrepreneurs. On the other, many women have complained about the lack of transparency in the way the clubs were managed. These results showed the need for increased funding and a more efficient management system to achieve the objectives.

Another obstacle that women find when it comes to entrepreneurship is the lack of contacts. According to Chinonye et al. (2015) regular access to networks provides business information vital to the success of the entrepreneur. Women entrepreneurs need to have a vast network of contacts, but unfortunately, in some African countries women's social circle is restricted and they only maintain relations with their family members. To favor networking, and at the same time gain access to certain resources such as infrastructure, technology and training, certain institutions, both public and private, have opted for the creation of different incubation spaces. Hackett and Dilts (2004) classify the different types of incubators as the business incubator, the business accelerator, co-working spaces or technology hubs, while Barbero et al. (2012) offer an alternative classification, according to who the owner is, of basic research, university, economic development and private incubator.

The European Union defines a business incubator as "an organization that accelerates and systematizes the process of creating successful companies by providing them with a comprehensive and integrated range of support, including incubator space, business support services, clustering, and networking opportunities" (Al-Mubaraki and Bluster 2011). They are often a route to capital from angel investors, state governments, economic development coalitions and other investors. Barbero et al. (2012) show that incubators have a positive effect on company performance indicators such as: (a) firm growth; (b) participation in R&D programs; (c) input R&D; (d) output R&D; and (e) employment generation cost.

Some of the models identified above can be found in Africa (Bertenbreiter 2013; Masutha and Rogerson 2014). According to Bertenbreiter (2013), technology labs are the model of incubation space most commonly found in sub-Saharan countries. Very close to the original incubator model, technology labs provide entrepreneurs with shared office facilities and business assistance. Sometimes they are designed as co-working spaces, facilitating collaboration and the creation of entrepreneur networks. BongoHive in Zambia, which offers both start-ups programs and accelerator launches, is an excellent example of the technology lab. It has supported social entrepreneurship projects, especially in the field of green fashion based on the development of energy-saving techniques. The importance of the fashion sector in Zambia has also led BongoHive to organize meetings between local young entrepreneurs and some of the most important designers in the country, such as

KC Vaghela.[2] The objective of these meetings is for entrepreneurs to get to know the fashion industry and to learn how to take advantage of a market opportunity like that offered by traditional African designs.

Other kinds of business incubators are for-profit incubators, such as Seed Engine in South Africa, which offers specialized training programs for women entrepreneurs. This is a new model of incubator space specializing in providing support for high-potential entrepreneurs. Their three-month program guarantees the company's acceleration, providing them with seed funding, top-quality advisors and a network willing to fund their business projects. Their concern for the development of the country is underscored by the long-standing relationship between WDB (WDB Investment Holdings) and Seed Engine, and their joint commitment to the transformation of the South African economy through the development of young women entrepreneurs. Seed Engine incorporates Seed Academy, an entrepreneur activation business, as well as the WDB Seed Fund, which focus on funding business project leads for African women.

Similar to the technology labs in terms of primary objectives, but different regarding management structure, guiding principles and sustainability models, is the hub. This model has proliferated across the African continent, with examples to be found in Kenya (IHub), Cameroon (Activspaces), Uganda (Hive Colab), Tanzania (KINU Hub) and Botswana (Botswana Innovation Hub). The hub is a co-working space, aimed at technological entrepreneurs who operate in open spaces and meet daily to participate in talks, meetings and seminars of interest to the community of programmers, investors, students and entrepreneurs within a specific sector.

Non-profit incubators are the third type of incubator space that can be found in some parts of Africa. As university incubators, they merge two incubation concepts into one: a training programme and other relevant business development services (BDSs), as well as physical incubation workspaces for the participating enterprises. Note also that these incubators are specially designed for non-technological entrepreneurs. An excellent example of a non-profit incubator is the Meltwater Entrepreneurial School of Technology (or MEST) in Ghana. The MEST Incubator Program (launched in 2008) provides training, investment, mentoring and networking for aspiring sustainable technology women entrepreneurs.

[2] Videos of the meetings can be found on BongoHive's YouTube channel. For the meeting with KC Vaghela, see https://www.youtube.com/watch?v=7Y7NoPZO5iI.

The last type of incubator to consider is the university incubator. This kind of incubator usually belongs to a university technology park, and their mission is the commercialization of university projects especially in technology, natural sciences and medicine. The university typically finances the business project, while the incubator offers the infrastructure, training and the necessary networking to get it going. Some university incubators allow entrepreneurs who are not enrolled in a university to access the academic knowledge which they would otherwise lack, at the same time giving academic researchers prime access to the study of entrepreneurial behavior and best practices.

According to the *Disrupt-Africa.com* website in 2016, the University of Nairobi and Stellenbosch University (South Africa) were among the seven best African universities to ensure students had all the tools to launch and grow successful businesses. The C4DLab is an incubator-cum-accelerator that belongs to the University of Nairobi. It has run many critical initiatives and events, and among its partners are UNICEF and Intel. The LaunchLab at Stellenbosch University in South Africa incubates start-ups run by female students and faculty members. It also runs competitions, such as the Ideas Programme or the Pitching Platform (Disrupt-Africa.com 2016). It is currently preparing to launch the latest round of its global pitching roadshow to attract potential investors, collaborators and partners, and in which selected African tech start-ups are encouraged to participate.

Non-profit incubators can also be found in universities. One example is AfricaCentre in South Africa, a non-profit multi-disciplinary management consulting firm working towards a green economy and offering incubation programs targeting grassroots communities. They support projects led by social entrepreneurs to accelerate local companies' activities, create jobs and activate the local economy. Although the nature of their interventions varies depending on the area of operations, currently they are focused on building sustainable agribusiness, fighting energy poverty and promoting access to sustainable water supplies for rural communities.

Domestic government initiatives have driven several support services for women entrepreneurs. For instance, Technology for Women in Business (TWIB), the South African Women Entrepreneurs Network (SAWEN) and the Women's Fund have been established in South Africa (Witbooi and Ukpere 2011). TWIB was created by the government's Department of Trade and Industry in 1998 to help advance women in business, with a particular emphasis on the application of science and technology to achieve business growth in women-led sustainable enterprises, particularly within the micro, small and medium enterprises (MSME) segments. The SAWEN initiative provides specifically targeted support to women entrepreneurs who operate within South Africa's MSME sector, offers events such as seminars, training and capacity building, and, organizes international educational and empowerment trade missions to Beijing, Morocco, India and New York. Another programme is the Lagos State Employment Trust Fund (LSETF) in Nigeria, a multi-million dollar initiative by the Lagos state government supporting skills for employability and, at the same time promoting entrepreneurship and new start-up projects in sectors that favor sustainable economic growth, and that are led by women and young people—also offering heavily subsidized loans and a range of BDSs.

Finally, there are other local initiatives in the private sector, where local brands have started to support women's empowerment, favoring entrepreneurship in the fashion sector. For instance, in Rwanda, Indego Africa is working to promote women through economic empowerment and education. Indego is a non-profit social enterprise, founded in 2007, that partners with female artisans in Rwanda and sells their handcrafted products worldwide, pooling the profits, along with grants and donations, to fund education for them in business management, entrepreneurship, literacy and technology. It has taken the work of its artisans to a global level by partnering with the likes of J. Crew, Eileen Fisher, TOMS and Nicole Miller. In mid-2007, Indego Africa began its first partnership with a cooperative of 30 female artisans in Kigali called Cocoki. In 2014, it partnered with over 600 women across 18 cooperatives, selling their products through its website, in boutiques worldwide and in collaboration with major designers and brands including Anthropologie, DANNIJO and J. Crew. In 2014 Indego Africa also launched a Leadership Academy in Kigali, Rwanda to provide advanced business education for those of its artisan partners who had mastered its basic education programs.

3.2 External Support for Female Entrepreneurs

Since the end of the last century, awareness has been raised at international level of the need to enhance the role of women in different aspects of life. For instance, the Beijing Platform for Action, which emerged from the Fourth World Conference on Women in Beijing in 1995, reinforced the various efforts previously undertaken and established gender mainstreaming as a global strategy for the promotion of gender equality. As Hannan (2000) demonstrates, one of the main conclusions was the recognition that much progress has been made towards an understanding of the negative impact of gender inequalities in some areas of economic development, particularly those concerning obstacles to the economic empowerment of women and the elimination of poverty.

International institutions such as the UN and the World Bank have long adopted a gender-sensitive approach in their policies and programs. Other institutions, however, still have a way to go addressing gender mainstreaming to achieve the primary goal of eradicating poverty and promoting sustainable, people-centered development (Maleko 2008).

The UN and the World Bank have been addressing issues relating to the advancement of women, gender equality and sustainable development since the early 1970s. UN actions have led to greater international recognition of the importance of incorporating a gender perspective in all its goals (political, economic and social), including poverty eradication, human rights, good governance and environmentally sustainable development. Meanwhile, the World Bank, having published reports about women's position regarding economic growth and their relatively low participation or non-inclusion in national economic development programs, recognizes the need for "engendering" macroeconomic policy. It recommends that macroeconomic frameworks sensitive to gender be developed in order to serve as guides to understanding the gender implications of different economic restructuring packages.

It is important to highlight the significant work of the United Nations Industrial Development Organization (UNIDO) in promoting female entrepreneurship in Africa. The organization, which was formed in 1966, encourages cooperation between industrialized countries and developing nations. Its objective is to accelerate industrial development, stimulating activities to promote investment and technology transfer.

UNIDO collaborates with organizations and local governments in Africa on several levels. An example is the "Action Plan for the Accelerated Industrial Sustainable Development of Africa", developed in collaboration with the African Union Commission with the aim of increasing Africa's competitiveness with the rest of the world. One of its main activities is to add value to goods for export and develop local production capacity, undertaking a range of activities to upgrade value chains and taking a product through various phases of processing to its final market destinations.

Other activities are based on collaboration with companies and individuals. An example is the Ethical Fashion Initiative (EFI) created in 2009 by Simone Cipriani with the help of UNIDO. This initiative sees fashion as *a vector of sustainable development* with mutually beneficial collaboration between local producers and the fashion industry. The idea is that local artisans can manufacture ethical fashion products that also have significant added value for international designers. According to Castro (2018), the project began in 2003 with the creation of a cooperative in the slums of Korogocho, Kenya for a group of micro-producers under the direction of Gino Filippini (1939–2008), who was working with the NGO Servizio Volontario Internazionale (SVI). Progressively, the project expanded to Burkina Faso, Mali, Ghana, Haiti, the West Bank, Ethiopia and Cambodia. Through the EFI, Simone Cipriani has now become the spokesperson for sustainable fashion in the growing movement for ethical supply chains in the fashion industry.

Further examples of international organizations' involvement in mainstreaming gender participation in economic development can be found in a 2009 project supported by the UN through the United Nations Conference on Trade and Development (UNTACD), and operating in Zambia in collaboration with the Zambia Development Agency. The National Business Linkages Program provided incentives for small businesses led by women in particular to transact business with large companies, both transnational and indigenous firms (Green Jobs Program 2018). The primary goal was to facilitate the creation and deepening of business linkages between the companies to stimulate the development of sustainable markets in which small local companies could actively participate.

According to Mumba (2014), this kind of initiative allows three different types of relationships to be established: (a) backward linkages with suppliers, where large companies source parts, components, raw materials, inputs or services from the small suppliers; (b) forward linkages with the intermediary small company, where large companies outsource the distribution of their products to a small company; and (c) linkages with technology partners, where large corporations initiate collaboration with small local partners in the form of joint ventures, licensing agreements or other strategic alliances. This author also recognizes that the last relationship (c), represents the best form of alliance, stimulating increased economic activity between established larger firms and MSME operators and female-led enterprises. It creates a win–win situation with both parties identifying and utilizing a number of complementary strengths to their mutual benefit. Not only do the partners obtain business benefits, but this type of action can also have a positive impact on the nation.

Furthermore, the World Bank's financial assistance program has helped immensely in supporting the socio-economic growth of key sectors in Africa: examples include the financing of projects mainly aimed at the creation of infrastructures, or the development of strategic sectors such as agriculture, and public goods and social services. An essential part of such projects, as implemented in sub-Saharan Africa, has been to elevate the region's status to one of the regions of the world with the greatest potential for growth, achieving 4.1% growth in 2015.

In 2015, the Bank approved US$11.6 billion in total for 103 projects in the region. The support program included US$1.2 billion in IBRD[3] (International Bank for Reconstruction and Development) loans and US$10.4 billion in IDA commitments (World Bank 2018).

Among the key objectives of the World Bank is the provision of an incremental and comprehensive support package for female entrepreneurs globally. In July 2017 the World Bank announced the Women Entrepreneurship Financial Initiative (We-Fi).[4] These tools act as a financial intermediation instrument managed by the World Bank that seeks to promote the entrepreneurial spirit of women "in developing countries by offering them greater access to finances, markets, and networks that are essential to starting and running a company" (We-Fi 2018).

The We-Fi initiative has the support of some EU governments as well as those of the USA, Canada, China, Russia and Saudi Arabia. The fund has raised more than US$1.6 billion for programs designed to break down the barriers faced by women in business in developing countries. The initiative has received strong support and has extended to support

[3]According to the World Bank website the IBRD is "a global development cooperative owned by 189 member countries. It provides loan, guarantees, risk management products, and advisory services to middle-income and creditworthy low-income countries, as well as by coordinating responses to regional and global challenges."

[4]Wi-Fi It is popularly known as "Ivanka Fund", because of the involvement of Ivanka Trump, daughter of US President Donald Trump, selected several projects of the Islamic Development Bank to complement and expand successful businesses led by women in Yemen, Mali and Nigeria, and the Asian Development Bank to improve the female business environment in Sri Lanka.

women-led businesses at the earlier stages of growth, also unlocking access to equity and insurance services. We-Fi is a platform that enables country-level reforms to be aligned with private investment, with the aim of favoring female entrepreneurship in certain sectors strategic for the country's economy. To achieve their objective, they collect critical data from the public and private sectors on female entrepreneurs and their firms, and support innovation and learning for results at scale.

The resultant training programs include infoDev's Mobile Startup Camp (Infodev 2018). With the support of a network of incubators, this initiative has formed and financed technology projects led by women. One of the most successful projects has been *ShopSoko.com*, a mobile and web platform that connects Kenya's artisans with online shoppers (Shopsoko 2018). The platform promotes the artisans' products to a global marketplace. Some 70% of Soko artisans are women whose products use sustainable and ethically sourced materials like bone or cow horn. The artisans use a mobile app to register their products and upload descriptions and photos. The Soko team does the rest of the marketing and promotion on the web platform, and handles the sales transactions. The sellers determine the price of the product and the shipping costs, which ensures that the majority of the profits remain with the artisans. Soko adds a small mark-up to cover the additional operations costs on the platform, ensuring the artisans receive customers' international payments via their mobile app.

Another international organization that promotes economic development and social progress in African countries is the African Development Bank (AfDB). This financial institution, created in 1964, draws its membership from 53 African countries and is funded by 24 European, American and Asian countries. Among its support programs is the African Women in Business Initiative (AWIB). Aimed at promoting women's entrepreneurship, the initiative has the following objectives: (1) to conduct studies that assess the constraints and conditions for creating an enabling environment and promoting women's entrepreneurial development in Africa to develop new and innovative approaches to address these constraints; (2) to reinforce business support provision and strengthen the institutional and technical capacity of national businesswomen's associations; and (3) to develop concrete forms of support for enterprise education and entrepreneurship development. They mainly promote investments in the fashion sector, increasing access to finance for women entrepreneurs, and incubating and accelerating start-ups.

Other international organizations and governments have also favored the development of female entrepreneurship in the fashion sector in Africa. For example, in 2017 the European Union and the International Trade Center launched a €10 million project in Burkina Faso and Mali to support job creation in fashion and interior furniture in West Africa. As two of the most important cotton producers in Africa, the artisanal cotton and sustainable fashion sector of these countries has high growth potential. Increasing activity in the transformation of cotton, providing added value, is expected to create numerous employment opportunities for young people from marginalized communities (Castro 2018). Among the collaborators are Vivienne Westwood, Camper, the Fashion Film Festival, Karen Walker, Lancaster, Marni, Mimco, Noir Tribe, Stella McCartney and United Arrows. In the case of the Camper Company, the long-term goal is to produce a limited edition shoe collection every year.

Another example is the US government, which funds the African Women's Entrepreneurship Program (AWEP), mainly addressed to women entrepreneurs across sub-Saharan Africa. Through the Department of State's International Visitor Leadership Program (IVLP), approximately 30 African women entrepreneurs arrive in the United States each year to attend professional development meetings and network with policymakers, companies, industry associations, non-profit groups and multilateral development organizations (US Department of State 2018).

A final example of international support for female entrepreneurship comes from the Japanese government, via the Japan International Cooperation Agency (JICA). The agency promotes livelihood, employment, entrepreneurship and sustainable business development, as well as microfinance for women's economic empowerment in Asia, Africa, the Middle East and Latin America. In Africa, JICA mainly supports businesswomen who run their own specialist businesses, while another program provides support to women in rural and agrarian communities. Among the initiatives developed is the Africa–Japan Business Women Exchange Seminar, which started in 2013; seminars have taken place in Japan every year to date. The seminars have three major purposes: developing leadership and capacity of African businesswomen; promoting understanding of government and private-sector efforts to support businesswomen in Japan and African countries; and networking among African and Japanese business women.

Some companies in the fashion sector have launched initiatives to promote women's entrepreneurship in sustainable fashion, with countries like Ethiopia becoming a focal point of interest for large companies such as H&M, Primark, Ayka, Arvind and DBL. In 2017, the Bengali group DBL invested US$100 million in the creation of a textile factory, while H&M and Primark have opted for joint ventures with local manufacturers to train workers and mentor factory managers (Modaes 2017). The attractiveness of Ethiopia lies in its free trade agreements with the EU and the USA, and the strong support of the local government, which has led to textile exports in recent years amounting to 6% of GDP.

Another important source of aid for women entrepreneurship comes from NGOs in many African countries. Examples include the African Women's Development Fund (AWDF) and the Center for Global Enterprise (CGE). AWDF is a grant-making foundation that supports local, national and regional women's organizations. Its programs provide technical skills and training for women aimed at developing and strengthening grantee organizations and their work (AWDF 2018).

The CGE is a private, non-profit, non-partisan research institution based in New York. CGE sponsors the African Women Entrepreneurship Cooperative (AWEC), a 12-month management training program for African women entrepreneurs and business owners. The training program is online, with live teaching by world-class business experts and academics delivered via video conference. Course activities are delivered through a highly interactive online learning platform. The program specializes in leadership and business management, but also offers women training in the application of technology in business, as well as soft skills such as teamwork and critical thinking (CGE 2018).

Taking advantage of their proximity to the African continent, some European NGOs offer training courses in collaboration with universities. Such is the case with the Women for Africa Foundation, which, in collaboration with the University of Granada, offered a course entitled "Creating opportunities for African women entrepreneurs in Spain" in March 2017. The objective of the course was to promote the role of female entrepreneurs, increase their level of.

Finally, the most critical challenge faced by most business start-ups in Africa is perhaps funding. Seed capital, the initial capital used to start a business or to allow the take-off and/or consolidation of existing business activity, often comes from the company founders' personal assets or from friends and family. Venture capital is a type of financial operation in which capital is contributed to start-ups and companies with high growth potential and high levels of risk in exchange for a percentage of the company. It is one of the main forms of financing for early-stage start-ups, those that are in their growth phase and those that have already used other funding sources such as family or friends. Alternative financial sources to banks, however, increase social entrepreneurship opportunities for women and this is where Angel Business in Africa comes in. Business angels or angel investors are individuals who inject capital into start-ups in exchange for ownership equity or convertible debt.

In developed countries, business angels or angel investors are becoming one of the more important sources of finance for entrepreneurs. According to Macht and Robinson (2009), they provide a wide range of financial and non-financial benefits to their investee companies. These authors found that business angels are generally helpful in overcoming funding gaps for fast-growing small firms. They can assist the management of such firms with knowledge and experience by providing time on the firm's board. They can also help widen the range of contacts and networks that the firm needs to secure additional capital and follow-on financing. Business angel support is especially important for women entrepreneurs since one of the main problems they encounter is the lack of funding and access to a network of contacts. Occasionally, business angels are the only source of financing if a business project is very attractive, but the fact of it being led by a woman means not finding alternative funding.

Entrepreneurs seeking to impress a business angel investor should do their homework on the people they hope to pitch to, and should seek to inject a sense of passion into their presentations and show the benefits the investment will offer to the business angels. They also need to look for cues suggesting a favorable response (Hill and Power 2002). Aspects of the potential entrepreneurial fashion project that may influence the investment decision include:

- Attractiveness of the project
- Company size
- Strong team of founders
- Good growth prospects
- Clear exit strategy (3–7 years)
- Attractive financial returns (>30% return on equity)
- Microfinance

Business angels are a relatively recent phenomenon in Africa, although their growth has accelerated in line with the growth potential of the continent (Jenkins and Edwards 2006). The African Private Equity and Venture Capital Association (AVCA) is one of the more prominent African Business Angels. The AfDB also invests in the sector through Private Equity firms such as Africinvest, a Tunisian PE house with investments in retail companies including Maille Club Group (Algeria, Tunisia), Folly Fashion (Morocco) and Société Industrielle de Lingerie (Tunisia).

Venture Capital for Africa is the largest online community of venture capitalists, angels and entrepreneurs dedicated to building businesses on the African continent. According to Tomi Davies, president of the African Business Angels Network and co-founder of the Lagos Angels Network (LAN), there are now 63 such groups across the continent, a sure sign that access to capital for start-ups is rising (Davies 2018). Introducing the event, Davies stressed the importance of "hunting in packs" and creating angel investment networks so people can co-invest and learn from their peers. Finally, Davis notes that "there is a need to ensure a more coherent interface between investment sources from start-up to scale-up, and for this angels, venture capitalists and impact investors need to get along". The event provided across-the-board opportunities to discuss issues and build relationships, and also saw key funding developments with the launch of the Rising Tide Africa fund. Focused on female-run businesses, the fund is attempting to put together a group of female angel investors for the continent who will invest jointly, and help train others on how to get involved with investing. This significant achievement is expected to make a serious impact.

The key takeaway from the African Angel Investor Summit was that there is an investment scene in Africa, and it is growing. With increasing coherence and more investors joining the party, it is a scene that can only continue to grow, to the benefit of African start-ups everywhere, especially in sectors such as fashion, which shows a high potential for growth for an important part of the continent.

According to the AfDB Group, the fusion of tech and fashion—"fashiontech"—could make Africa more competitive in the sustainable fashion industry. The fashion technology practitioner creates and/or sells garments. The technical skills involved include not only sustainable design, pattern construction, cutting and garment manufacture, but also online retailing and advertising. The design of a garment requires innovation, creativity, and artistic and design talents that combine aesthetics and practicality. But even its online communication and distribution require innovation and creativity as there are many kinds of consumers, and they can be found on different online social networks. The website Ventureburn (2018) focuses on world start-up news and telling tech entrepreneurs' stories from emerging markets, covering everything from innovative new businesses and developments in e-commerce to helpful tips for entrepreneurs starting out.

In recent years one of the main sources of financing for women entrepreneurs in Africa has been microcredits. Fuertes and Chowdhury (2009) define microcredits as "programs of granting small credits to the neediest among the poor so that they can start up small businesses that generate income with which to improve their standard of living and that of their families". The main characteristic of microcredit is that it generally involves small amounts, which in African countries is around US$1000, compared to other continents such as Asia or Latin America, where the amount varies between US$100 and US$200 (Maes and Reed 2012). According to Lacalle (2008), the management of the loans is very simple and the associated bureaucracy very limited, the total repayment time of the loan is short (usually a year or even less) and small, frequent, disbursements are generally administered on a weekly or monthly basis.

A large proportion of the microcredits go to African women, not only because they are a disadvantaged group, but also because it has been proved that women can derive more significant economic benefits for members of their families than men (Maes and Reed 2012). Work such as Maringanti's (2009) reports that women from rural economies contribute more to household well-being with their income than men and that they are more likely to repay their loans, so microfinance initiatives everywhere prefer lending money to women. Microcredits are usually granted by NGOs, as in the case of the Spanish NGO Africa Directo and its PrestAD program which subsidizes business initiatives developed by women in Tunisia's textile sector (Prestad 2018). The UN created a special microcredit unit in 1997 to support projects in countries as diverse as Benin, Côte d'Ivoire, Ghana, Kenya, Nigeria, Madagascar, Togo and Zimbabwe (Ghatak 2000).

4 The Future for African Female Entrepreneurship in the Sustainable Fashion Sector

Our analysis has shown that the current business environment promoting and encouraging increased participation by women in the entrepreneurship ecosystem still leaves much scope for improvement.

African countries stand to benefit from the huge potential economic power base that women on the continent represent. However, so far women are still in the main a low-skilled workforce, working for international fashion companies whose interest in the economic and social development of the country is low.

It is encouraging that many African governments, with the continuing support of the international organizations and the international community, are making bold commitments to mainstream gender-oriented business and economic policies via the implementation of a range of segment-focused business support services to address many of the critical challenges inhibiting the growth of women-owned/women-led MSMEs, including opening up more space for access to finance for women entrepreneurs, as well as the provision of core small-business management skills. However, these efforts still need to be aimed at fostering the creation of value-generating activities, also favoring sustainable development over time.

One sector where female entrepreneurship has a more significant presence is fashion. The contribution of the African fashion industry to economic growth is widely recognized both locally and beyond. According to Leke et al. (2010), wholesale fashion activities represent 13% of African countries' exports. Among the key drivers of this growth are the resurgence of interest in fashion among young Africans and the middle class as a way of expressing their cultural identity, spurred on by the creative fusing of African-inspired designs with Western styles that suit different environments—whether formal or social.

The emergence, the role and the increasing interest of many household international labels and fashion designers in African fashion, coupled with a genuine approach to inculcating ethical practices right across the supply chain to promote sustainability within the sector cannot be understated, as has been illustrated by the work of Stella McCartney, Vivienne Westwood, Jacqueline Brown and many other specialist African fashion consultants and designers operating on- and offline.

But beyond the interest that African designs raise among Western consumers, the real competitive advantage of the African fashion sector lies in its capacity to add value by being economical, environmentally and socially sustainable. Traditional design and sustainability are the perfect combinations that a large number of African entrepreneurs are using to conquer local markets. Added to the internationalization opportunities offered by technologies, success is guaranteed.

Many of the current participants in the African fashion scene are a new breed of mainly young women entrepreneurs, many of whose collections are retailed through online platforms and social media, with many creating and exploiting new niche marketing opportunities, including the latest trend in the "stoning" of traditional outfits for women's social engagements, as well as the production of a wide range of complementary clothing and accessories. And, with the UN recognizing the twenty-first century as Africa's period of growth, there is no doubt that its fashion industry will continue to excel, supported by the increase in popularity of African fashion amongst its influential personalities and public figures—from Hollywood movie stars to sports, music, TV, entertainment and media personalities—as well as the seemingly unabated rise in the influence of key markets such as Nigeria, Ghana, South Africa, Kenya and Ethiopia.

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CHAPTER 7

Case Studies from Africa

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This chapter analyzes some of the situations examined throughout this volume. The four brief case studies presented explore real situations in four representative countries of the African continent: Kenya, Nigeria, Tunisia and Ghana.

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The first case study looks at local government actions designed to promote improvements in the local textile industry. In particular, the case analyzes a plan designed by the Ministry of Industrialization and Enterprise Development (MOIED) of Kenya and considers its achievements.

The following two case studies located in Nigeria and Tunisia, illustrate the main characteristics of the woman entrepreneur, as well as what have been the main difficulties encountered in her entrepreneurship career. Despite cultural differences between these two geographically separated countries, the characteristics shown by the entrepreneurs, as well as the challenges they face, are the same.

The final case describes how companies in Ghana led by women have achieved success in international markets thanks to the sale of sustainable products.

1 The Kenyan Textile and Fashion Industry: Sustainability as the Key of the Industry's Competitiveness

1.1 Introduction

Kenya's textile and apparel sector has the potential to play a critical role in anchoring the country's development. It can contribute as a source of gainful employment for its fast-growing, young population—especially women. But as a manufacturer, it offers opportunities to local companies for increased value capture through the building of knowledge, skills and experience from factory floor to management level.

Kenya's MOIED responded to these opportunities with an action plan aimed at improving Kenya's competitive position in this sector, based on two key factors: sustainability and worker training.

1.2 The Structure of the Textile and Apparel Sector

Traditionally there has been a textile industry in Kenya. Together with other East African countries it has a pool of talented small dressmakers, and fashion designers are geared to serving the global garment market (HEVA 2016). The Kenyan Textile and Clothing sector comprise 22 large foreign companies, 170 medium and large companies, eight ginneries, eight spinners, 15 weaving and knitting companies, nine accessories manufacturers and over 75,000 micro and small companies (Hivos International 2016). Women entrepreneurs are at the heart of Kenya's clothing and textile revolution and are responsible for showcasing the country's business potential to Africa and the world. The Kenyan fashion industry is 80% female and has the potential to employ 300,000 individuals (Hivos International 2016). As of November 2017, 15.3% of the female labor force in Kenya was unemployed (ILO 2017). This indicates that there are gaps in the potential of the Kenyan fashion industry to absorb the unemployed women.

The challenges facing the Kenyan fashion industry, as identified in a 2016 study conducted by the Association of Fashion Designers of Kenya (AFAD) in collaboration with Equity Bank, include: old and inefficient machinery; poor-quality raw and intermediate materials; acceptability of local fabrics to international users; policy deficit in the regulation of imports; high production costs; accessibility of microfinance; and informality of operations.

The adoption of AGOA in 2000 boosted the textile industry in Kenya, with increased foreign investment and increased exports to the USA. Kenya was the first country to adopt the agreement to fulfill the additional requirements for apparel (KNBS 2015). With its entry, Kenyan manufacturing companies could gain access to the USA market quota and dutyfree with a single-transformation rule of origin (even allowing them to import fabric from outside the region).

This, along with quotas on Chinese and other Asian exporters as part of the Multi-fiber Arrangement (MFA), made Kenya an attractive location for producing mass-market clothing for the US market. Between 2000 and 2004, Kenya's apparel exports—virtually all going to the United States—increased slowly, from US$8.6 million to US$17 million. With the ending of the MFA in 2004, apparel exports rose steeply, hitting a high of US$283 million in 2008 (KNBS 2015). However, uncertainties over the continuation of AGOA's rules of origin combined with the global financial crisis led Kenyan apparel, like the rest of the African textile and fashion sector, to suffer, and during the second half of the decade, exports fell. Currently, Kenya's trade with the United States is dominated primarily by the export of locally produced raw materials and textiles to international fashion companies.

But compared with other countries, the Kenyan textile and fashion industry is uncompetitive. Kenyan factories face some competitive disadvantages, many of which relate to the cost of doing business. One of the main problems is the high cost of electricity, which accounts for approximately 25% of the total cost of production. According to data provided by KNBS (2015), in 2014 a kWh cost 20 cents, compared to the 7 cents paid by Chinese companies, and the 6 cents paid by Ethiopian companies. Companies in Kenya are also characterized by the obsolescence of their production teams. Although investment in technology is necessary, many companies are reluctant to undertake such investments when they are unsure about the survival or competitive prospects of Kenya's textile and fashion sector.

A good proportion of the companies in Kenya work for international fashion companies, developing of labor-intensive tasks, but with little added value. If we add that labor costs are much higher than those offered by other neighboring countries, such as Ethiopia or Tanzania, it leads us to question the sector's continuity.

For apparel companies, labor productivity and time to market are central to their ability to compete. Comparatively higher wages do not necessarily inhibit apparel firms from competing globally as long as productivity rises to match higher wage levels. But this has not occurred in Kenya, where the value added to minimum wage ratio is lower than in most competitor textile and fashion countries. Skills concerns, both at management and technical levels, are to blame.

Speed to market also requires fast and effective logistics, and here Kenya fares unfavorably. A container takes longer to get to the USA than it does from countries such as China, India, South Africa and Vietnam. Costing over US$2000, it is also more expensive than almost all apparel-exporting countries, bar Ethiopia.

However, for the Kenyan economy, the textile and fashion sector is vital at the strategic level. According to data provided by the AFAD (2016), 80% of employees in the textile and fashion industry in Kenya are young women, with low levels of qualification.

As we saw in Chapter 4, traditionally women have been a group at risk of exclusion. However, recent international studies show that certain countries in sub-Saharan Africa are essential drivers of economic and social development, which is why empowering women is one of the country's priorities, given the high percentage of the population it represents and the high rates of unemployment in this group.

Since it is also occupied by a high percentage of collectives—traditionally at risk of exclusion—the textile and fashion sector offers important opportunities for growth within the economic activity of Kenya. However, the creation and strengthening of local industry in the textile and fashion sectors requires significant reforms that (a) have to be undertaken at government level and (b) imply essential changes at the economic and social level.

The strategy focuses on local companies promoting entrepreneurship and the continuous training of their workers, favoring investment in technology, and employing systems and production processes that are sustainable and offer improved efficiency. It is about reducing the dependence of local companies on international fashion companies, enabling local suppliers to manufacture products with high added value, so that their products can be sold in international markets, or failing that, their position in the global value chain can be improved.

1.3 New Opportunities for the Sector: The MOIED Plan

Since the end of 2017, MOIED has promoted various actions aimed at companies in the industry.

The first is the recommendation that local companies in the textile and fashion sector specialize in the production of the sustainable products increasingly demanded by global consumers and focus on environmentally (and socially) conscious consumers who are willing to pay a premium for products that cater to their concerns. The Lifestyles of Health and Sustainability (LOHAS) segment accounts for almost 20% of US adults, and more in European markets. The high growth of this segment offers a significant opportunity for companies in the sector, as long as they can implement the necessary reforms. In the first place, producing sustainable products requires modification to production systems. It involves the use of raw materials obtained sustainably, but also of energy-efficient and non-polluting production processes (Duflou et al. 2012).

Traditionally, companies in the textile and fashion sector in Kenya have not made the necessary investment in technology and production processes to make them more efficient and less polluting. Equipment in textile and apparel firms is outdated and consumes a significant amount of electricity.

In this context, and aware of the opportunities these recommendations offer in the medium and long term for companies in the sector, MOIED underlines the need to implement them urgently. Investment in technology and the renewal of production processes offer cost reductions that translate into an improvement of the company's competitive capacity. Furthermore, new market opportunities open up for the company, since the products manufactured incorporate an additional added value, derived from their sustainability. Finally, these investments can attract foreign capital, encouraging the establishment of new production plants.

Given the need for financial resources to undertake the necessary investments, MOIED has sought support from other local institutions, such as the Kenyan Association of Manufacturers, to help companies in the sector upgrade their equipment and technology. For instance, a partnership between the MOIED and KAM, as part of KAM's Sustainable Use of Natural Resources and Energy Financing project (SUNREF) has offered significant greening opportunities to manufacturers. SUNREF covers 70% of the cost of a factory audit, which identifies potential energy and cost savings. Free business plan assistance is then provided to help with applications for concessionary loans at interest rates of around 5% offered by specific banks engaged by SUNREF. In conjunction with the greening of production, the program facilitates matchmaking with potential buyers (Brazilian and Tagliapietra 2017).

A third recommendation by MOIED relates to ongoing training for workers and the promotion of local entrepreneurship, especially among women who represent about 80% of the textile and fashion industry workforce.

Rapid changes in the design, materials and production methods require knowledge and skills necessary to implement them. In Kenya, a traditional approach to training through local training institutions has failed to keep up with the pace of change required to remain competitive in the textile and fashion sectors. University education is also unusual for women, both because of the high cost and because of the group's social disadvantage.

This has led to the emergence, both from the public and private spheres, of initiatives that facilitate access to up-to-date specialist knowledge of the sector for the female collective. Knowledge is often imparted informally and in the workplace, as with the role played by the hubs. But collaboration between companies, and scientific institutions and research centers is also encouraged.

An important part of the necessary training is specifically related to productive activities. However, women also need training in other aspects such as business management and the use of technology, especially since one of the priorities of the MOIED is to promote entrepreneurship among women.

Female entrepreneurs in Kenya create their companies not because of the abundance of opportunities, but because of the need to survive. Many women become entrepreneurs because it is the only way to cover the expenses of their family. Most projects are undertaken alone, are small in size and cannot hire employees.

Training deficiencies are one of the reasons for women's projects failing to take off. Lack of management knowledge leads to strategies that do not prosper, such as accumulating different lines without consolidating those that are profitable. But there are other factors that do not allow the women entrepreneurs to grow. They often come up against traditions contrary to their economic independence, such as the need to undertake domestic tasks and care for children. There are also legal restrictions for women that can hinder their access to finance, or make them dependent on their husband or father for certain procedures.

1.4 Female Entrepreneurship Success Stories

Despite the difficulties faced by women, there are recent cases of successful female entrepreneurship in the fashion sector, some of them with sustainability orientation.

1.4.1 Case One

Adèle Dejak creates handmade fashion accessories inspired by African shapes, textures and traditional techniques. These accessories are not only high-fashion pieces, they could easily be called artifacts. The Adèle Dejak creates statement pieces to help the African woman seeking a unique, individual style.

She studied typographic design in England and Italy before moving to Nairobi, Kenya in 2005 and turning her attention to accessories design. She was captivated by the natural beauty of horn and began experimenting with it, using different techniques to create chic, original pieces. Her brand is based on an ethical and sustainable business model and aims to empower communities by celebrating local cultures, teaching technical skills and creating employment opportunities. Adèle Dejak employs 25 talented beaders, tailors and artisans in the creative process, contributing to employment generation in the country.

1.4.2 Case Two

Diana Opoti PR is a fashion consultancy company involved in brand strategy, publicity, and campaign development and management in the fashion industry in Kenya. The role of middleman/link between the customer and service provider is essential in business transactions particularly for new entrants into an industry or country.

The publicity and marketing subsector of the fashion industry has a gap in network supporting the growth of fashion professionals, standardizing services and challenging professionals to set trends and compete with international brands in Kenya. Similarly, the recruitment of the right individuals with the right skills for a job is imperative for every business concern. Diana Opoti PR provides services in the areas of publicity, product reviews, fashion campaigns and recruitment. Entrepreneurs have the challenge of getting clients to pay for non-traditional services. Diana Opoti PR has been able to achieve this by earning the trust of fashion brands because of its online visibility, gaining referrals from satisfied clients.

Narratives:

The key for would-be women entrepreneurs is

> Find a niche. Turn what you like into a business. Passion fuels business.

1.4.3 Case Three

Nuba Elamin, Lynn Bugaari and Tetsi Bugaari, owners of Buqisi-Ruux, create high-heeled shoes for women covered in bold and colorful African print material. The importance of having the African narratives changed by Africans is highlighted in the efforts of Buqisi-Ruux to tell African success stories by naming the shoes after inspirational African women. Thus, Buqisi-Ruux projects the diversity, vibrancy and boldness of the African continent. The founders of Buqisi-Ruux are close relatives and family businesses are often sustained by the bonds of affection and shared values. Buqisi-Ruux was inspired and is sustained by a combination of passion, curiosity, interest and opportunity.

Narratives:

> I love to say that we create wearable art by putting Africa at your feet.
>
> The name Buqisi-Ruux means "Queen of the Village". Buqisi comes from an ancient Egyptian word meaning Queen, while Ruux represents our home town Rukungiri. The name symbolizes what we as Buqisi-Ruux

> find important; our African heritage and the sensation of royalty and pride we want women to feel when they wear a pair of Buqisi-Ruux shoes.
>
> The Buqisi-Ruux brand celebrates the success of the African continent and its women, as each shoe is named after an inspirational African woman and her story is shared with the world.
>
> We are looking to grow the Buqisi-Ruux brand to be a global platform that will not only continue to provide high-quality, contemporary, high-heeled shoes covered in African print material, but that will also provide a basis where we have the opportunity to share the stories and successes of Africa, and most especially, the African woman.
>
> We have to find different ways to innovate our brands to remain relevant. (Tetsi Bugaari, co-founder Buqisi-Ruux)

These narratives show that Buqisi-Ruux, by using African fabrics to make high-heeled shoes, is creating products acceptable in the global market.

1.4.4 Case Four

Brigit Wasike and Sophie Umazi Mvurya, co-founders of House of Tahzi, create high-quality, affordable clothes for Kenyans. The challenge of creating affordable products and services is unavoidable for most entrepreneurs. The aim of most businesses is the creation of a unique product. To this end, House of Tahzi creates unique outfits for their clients. Businesses sometimes form alliances to minimize the weaknesses of the parties, maximize their strengths and take advantage of shared assets and liabilities. In this connection, House of Tahzi is an amalgamation of two independent but complementary fashion ventures.

The following narratives indicate that House of Tahzi is contributing to the accessibility of African fashion because the issue of the cost of products and services is central in the African context.

Narratives:

> Our similar vision for Kenyan fashion as a trend influencer in the global fashion world bore fruit to our partnership, where we combined both our lines to form House of Tahzi.
>
> We are an energetic and dynamic young company that has forged links with the most competent personnel and stakeholders within the clothing and branding industry.
>
> We plan on building a House of Tahzi lifestyle empire that extends beyond the world of fashion across the world.
>
> … always be willing to learn not only through your experiences but from other women, irrespective of their industries.

2 Female Entrepreneurs Dominance of the Nigerian Fashion Industry: Myth or Reality?

2.1 Introduction

The global advocacy that we are currently seeing for more inclusive-growth economies, especially in developing countries, where equal opportunities are created and accessible to all, should be the focus for all stakeholders, including academia. In Nigeria and most other developing African nations, a persistent and common concern is the widening gap between men and women in terms of employment, poverty levels, standard of living and participation in key economic activities, politics and other important sectors of the economy. This has been a recurring trend despite deliberate attempts by successive governments at the empowerment of women and other intervention programs. This headlong tackling of financial inequality may not produce the desired results unless a holistic strategy and inclusive sustainable framework that identifies and strengthens women-dominated industries are embraced. One such industry is fashion. Women, who make up 49.5% of the population, are pivotal to the economy of Nigeria (NBS 2015). Creating a sustainable path for women's empowerment and growth enabling them to gain more control over their lives cannot therefore be over-emphasized (Page and Czuba 1999). An enabling environment for a woman implies access to more opportunities and resources, increasing her array of choices, and her ability to drive the social entrepreneurship and change needed to influence the trajectory of any economy.

The creative economy is a potentially lucrative social and economic change agent in developing countries. Global assessments of the industry, according to Unchad (2010, cited in Langevang 2016), suggest that "the creative economy can foster income generation, job creation, and export earnings while promoting social inclusion, cultural diversity, and human development" in any economy. While most developed countries have over the past few decades recognized the diverse value embedded in this industry and are using all economic tools to drive it, the direction in Africa is still very vague. For instance, the global market for fashion dates back decades in France, considered to be one of the largest and most important fashion hubs in the world. Mode à Paris organizes the semi-annual Paris Fashion Week, which showcases a range of designers. Similarly, in Milan, London, New York, Chicago, Virginia and Tokyo, fashion events are held throughout the year showcasing various designers and their exclusive collections (Grail Research 2009). These Western countries have used fashion to shore up the GDP of their respective economies while simultaneously exporting their culture, vividly expressed through their designs. For instance, Japan, the fourth-largest apparel market in the world, has its fashion industry heavily influenced and driven by its affluent population and youth culture (Grail Research 2009).

The annual turnover in the US fashion industry is over US$250 billion, making it one of the five top fashion markets in the world (JEC 2015). One of the benefits of globalization for the US economy is the spread of its fashion across major continents of the world, especially the densely populated Africa and Asia (Doeringer and Crean 2006). In contrast, fashion events in Nigeria and major cities in Africa are still a mirage, despite the abundant natural and human resources that can be harnessed to effectively drive the fashion industry. Nigeria, for example, has a multi-skilled human population with diverse intellectual capacities; the country is also rich in arable land that can grow sustainable cotton, raffia and plants such as *Kola nitida*, *Cmelina arborca*, *Prosopia Africana* and *Tcctona grandis* that are used in dye production (Alamu and Ajibola 2007); cassava (used for starch); polymers; and other raw materials essential for textile production and design. The fashion industry in Nigeria is therefore still an untapped goldmine.

This case study highlights the potential of the fashion industry in Nigeria, but also the challenges it presents, especially to women entrepreneurs. The analysis of six in-depth interviews with the country's principal clothing and accessories designers shows the importance of women to this sector, as well as the characteristics and motivations that women entrepreneurs have to start and continue their professional careers.

2.2 Fashion in Nigeria

Fashion in Nigeria is an evolving multi-structural industry that consists of diverse areas of expertise, interests and participants ranging from micro-businesses (mostly in the informal sector) to small enterprises (gravitating more towards the formal sector). It is a major player in the country's creative economy, with a continuum of simple to sophisticated manufacturing clusters that provides employment along its value chain for a large number of women across all social strata. In monetary terms, the fashion industry in Nigeria is worth billions of naira, mostly generated from its huge local market and exports of designs and finished garments to foreign countries.

The three major business subsets within the Nigerian fashion space are textiles (weaving), designing (surface fabric design and garment making), and accessories (bags, shoes and jewelry).

2.2.1 Textiles

Historically, especially during the pre-colonial era, traditional textiles in Nigeria were categorized into woven, non-woven, patterned or dyed, and involve processes that create jobs generally but most especially for women. The Nigerian textile market was one of the largest in Africa, contributing approximately 10% to the country's GDP in the 1960s (Olutayo and Akanle 2009). However, the non-development of this important subset of the fashion industry led to its steady decline over the years. Weaving is a creative skill that is historically associated with women in most areas in Nigeria. Traditionally, cloths woven by hands constitute the indigenous textile industry which has a long record of being dominated by women (Asakitikpi 2007).

The popular traditional fashion textiles among different tribes are as follows.

Aso-oke is a skill-intensive woven and patterned cloth made locally by the Yoruba ethnic group (Olutayo and Akanle 2009). It was initially worn mostly by people from the south-west but is now embraced by almost all major ethnic groups in Nigeria especially as "headtie for aso-ebi" at special occasions (Olutayo and Akanle 2009). Aso-oke is also known for its use in epic ceremonial wear such as *iro* and *buba* for ladies, and *buba, sokoto* and *agbada* for men. The art of aso-oke making goes back many, generations with documented evidence (Clarke 1938; Murray 1936) suggesting that it was a primary fashion item and expression for men and women of Yoruba origin as far back as the late 1930s. It is still a significant subsector of the textile industry in Nigeria based on its creative patterns, and wide acceptance and usage (Aremu 1982).

Aso-oke is woven by men and women, but as a craft it is mostly dominated by women and it is one of the few trades that have a long history of a defined line of succession (Asakitikpi 2007).

Akwete is a woven cloth of Igbo origin and is mostly made by women in Ukwa East Local Government Area of Abia State in the south-aastern

Nigeria (Ikegwu and Uzuegbu 2015). According to McPhilips and Appolos (2012), Akwete cloth weaving is as old as the Igbo tradition and consists mostly of red and black designs. The weavers use a traditional technology which is local to the Igbos (Ikegwu et al. 2017). The intricate procedure and technology involved in Akwete cloth making bring out an array of beautiful designs that are mostly used as ceremonial wears (Ibeto and Ogunduyile 2015). Akwete also has the potential of being used in producing fast-moving tourist items (such as wristbands, handbags, tee-shirts, etc.) for both local and foreign visitors to the south-aastern Nigeria.

Okene is another loom-woven cloth named after its makers in Okene, Kogi State (north central). It is made by the Ebira people. History has it that the Ebira women have been weaving Okene cloth for centuries. Earlier generations of women did it as a craft to counter boredom but it has grown into a major commercial fashion item in Kogi with interested buyers traveling from other parts of Nigeria to purchase the beautifully and skilfully crafted cloth (Ibeto and Ogunduyile 2015).

Hausa cloth is commonly made with manufactured threads and wider looms than those used to produce *kente* cloth in Ghana). They often come out as beautiful and colorful strips used for special occasions in the northern part of Nigeria. They are however very similar to *djerma* cloth from the Republic of Niger. Another popular woven cloth in northern Nigeria, mostly worn by the Fulanis but now embraced by the Hausas, is *mudukare*, but this as become almost extinct. The beauty of *mudukare* weaving is the very simple technology employed by the weavers despite its very sophisticated appearance (Gusau 2016).

The following case studies, informed by in-depth interviews, highlight the experiences of female fashion entrepreneurs in Lagos.

2.2.2 Direct-Design Printed Fabrics Used by Nigerian Fashion Designers

Local *adire* is a traditional work of art mostly created by Abeokuta women in the South-west Nigeria. However, it also has tradition among the Jukun people in the North and in some parts of West Africa. It is one of the most popular fabrics in Nigeria and uses a simple but yet complicated technology to produce different patterns. In “The Bluest Hands”, Byfield (2002) gave a critical review of the historical connection between Yoruba women and *adire* making with a brief discourse on how neglect may have been responsible for the under-development of the industry.

Nigerian factory-produced printed fabrics borrow their inspiration mostly from the country's culture, but due to external influences, lack of direction and unfavorable policies the industry now depends more on foreign technology (Makinde et al. 2015). The industry is now near absolute collapse with considerable job losses and a major impact on the secondary users of these fabrics.

Foreign colorful printed fabrics produced in other countries and outside the continent enjoy wider patronage from Nigerians for diverse reasons: varieties, texture and quality, designs, affordability and consistency. The collapse of the textile industry in Nigeria is also responsible for the unavailability of the made-in-Nigeria printed fabrics that were the toast of West African fashion from the 1960s to the early 1990s (Makinde et al. 2015). Popular foreign printed fabrics include Vlisco, Uniwax, GTP, Woodin (Dutch); DaViva, ATL, Printex and Kente (Ghanaian); Dutch Super Wax (Dutch); Hi-Target (Chinese); ABC English Wax (UK); and Excellence Fabric (unknown).

2.3 Basic Information on Interviewees

Interactions with these women suggest that they are highly sought after with a high demand for their creativity and designs. They have created a niche for themselves and almost all of them identified the enormous growth potential and opportunities lurking in the Nigerian fashion industry.

2.3.1 Clothing

Unique Needle Apparel was started in 2005 by a university graduate. They design bespoke women's garments using a variety of African and other fabrics.

Valerie David's Limited was started in 2006 by a biochemist graduate. The company is known for designing, training, haute couture, bespoke womenswear and bridal wear.

Tareoni Limited was started in 2011 by a university graduate. The company makes bespoke apparel for women mostly using African fabrics. However, they also work with other colorful prints.

Takeover Clothiers was started in 2013 by a university graduate. They are involved in designing haute couture and bespoke apparel, mostly for middle-class women.

2.3.2 Accessories

Mona Matthews Ventures started in 2002. This very articulate lawyer-turned-designer produces made-to-measure high-quality leather shoes and bags to international standards. Mona Matthews also does private collections while still maintaining the versatility of their designs.

Madame Coquette was started in 2008 by a very fashion-conscious university graduate. She makes intricately designed leather bags from mostly locally sourced materials.

2.4 Recurring Themes from the Interviews

2.4.1 As an Entrepreneur, What Reasons Have Led You to Enter the World of Fashion?

Among the reasons given by the entrepreneurs were: passion; love of fashion; being fashionable and stylish; creativity; an eye for details; styling people; creating jobs for other women; filling the entrepreneur's unmet needs and those of others around her; the desire to create a brand; the need to express innate creative skills; meeting social needs; the need to promote Nigerian brands; and a large ready market.

2.4.2 What Elements Have Influenced Your Business Career?

Common influences were parents, older siblings, exposure and experience, love for African prints, love of colors, love of leather, self-motivation, and recognition of an opportunity.

2.4.3 What Is Your Greatest Inspiration?

Customer presence, brand demand, satisfied customers, goals and vision for business growth, work, religion, stylish women.

2.4.4 What Are Your Basic Requirements?

passion, drive, discipline, commitment, customer satisfaction, training, adequate finance.

2.4.5 Prompts for Choice of Raw Material

Customer's needs, purpose (use), fabric design, color and motif, uniqueness, durability, trend, budget.

2.4.6 Sources of Raw Materials:

Mostly local (imported African prints), *adir*e and batik (produced locally), leather (sourced locally and also imported by the suppliers), other cotton fabrics (imported), ornaments (imported).

2.4.7 What Are the Main Challenges You Encounter in Your Daily Activity?

Infrastructural problems especially steady electricity supply and good road network, lack of reliable and skilled manpower, high production and marketing costs, access to affordable finance.

2.4.8 Gender Dominance of the Nigerian Fashion Industry

95% think it is female dominated. Secondary sources also feature mostly female designers across the industry.

2.4.9 What Are the Main Barriers to Women Making It in This Business?

Egoistic attitudes of male employees, poor cash flow, inadequate capital.

2.4.10 From the Marketing Point of View, What Factors Hinder Sales and Distribution?

Duplication of designs by competitors, funds.

2.4.11 Which Are the Most Efficient Marketing Platforms?

word of mouth, satisfied customers, exhibitions, social media, print media.

2.4.12 Tracking Progress

Customer feedback, quality of work, brand performance.

2.4.13 Perceptions of the Nigerian Fashion Industry

High growth potential, profitable, higher rated than most other African countries, some presence in the global market (but not strong enough), high employment creation.

2.4.14 High Points of the Nigerian Fashion Industry

Evolving fashion shows, e.g., Lagos Fashion Week and Lagos Leather Week (though very few and far between), unique Nigerian designs and creativity; support shown by high-profile Nigerians wearing wholly Nigerian brands, gradual embrace of Nigerian designs by important foreign personalities such as Michelle Obama, showcase of Nigerian designs at reputable world fashion events.

2.4.15 Gaps in the Industry

Lack of strong mentorship from Nigerian female fashion veterans; lack of affordable design masterclasses, inadequate government support in terms of friendly policies and accessible infrastructure, insufficient recognition and accolades for the fashion industry, lack of entrepreneurial training, scarce locally made raw materials, inadequate promotion of Nigerian brands by relevant stakeholders, absence of high-quality skill acquisition programs for women (especially in garment making), dearth of Nigerian textiles.

2.5 Main Conclusions

From textile weaving (by rural women) to garment design, production and sales (mostly by urban women), women control a large chunk of the economic activities that take place in the fashion industry. Secondary sources also present the success stories of internationally recognized top-notch female clothes designers such as Deola Sagoe, and other celebrated female entrepreneurs in the fashion industry such as: Wunmi Amokeodo (she makes ready-to-wear and made-to-measure clothes for women); Adenike Ogunlesi (the initiator of leading African brand for children, Ruff 'n' Tumble); Adey Soile (maker of ready-to-wear and made-to-measure corporate dresses that depict boldness in African women); Banke Kuku Textiles (use African prints to create exclusive home interiors and garments); Olatorera Oniru (a very creative dressmaker); Oluwatosin Lawson (promotes African prints by using them to manufacture lifestyle products such as backpacks, earrings, bangles); Femi Olayebi (a bespoke luxury handbag designer); and many others (Lioness of Africa 2015). However, despite the evident huge presence of women in this sector, an inclusive framework that has the potential to address both surface and underlying issues affecting the survival and growth of women in the industry is missing. Consequently, from a policy perspective, the focus of this chapter is to remind relevant stakeholders of the need to create a sustainable empowerment path for women in the fashion industry.

The available literature on the Nigerian fashion industry suggests that its secondary market (of design, production and sales) is one of the fastest-growing businesses in Nigeria but conversely, it lacks the proper direction required for the main players to tap into the wealth of opportunities inherent in the industry. Furthermore, the primary market (textile weaving and printing) requires focused attention from all relevant stakeholders to revive the industry and create an enabling environment to set it on the right track. A good understanding of the dynamics of fashion across all of its subsectors would elucidate the valuable tacit knowledge that is required to develop a holistic strategy for the industry.

3 Women Entrepreneurship in Tunisia: The Case of the Textile Industry in the Monastir Area

3.1 Introduction

Tunisia has historically been engaged in the clothing industry. Many brands such as Levi's manufacture their clothes in Tunisia, where textiles are regarded as a strategic national industry. It is the major sector in manufacturing industry in terms of exports, employment and added value. It represents 34% of total employment in the manufacturing industry, and 70% of the total industry exports from the country (Agence de promotion de l'Industrie et de l'Innovation 2014). The major importers remain European countries: 34% for France, 28% for Italy, 10% for Germany, 7% for Belgium and 4% for Spain.

Monastir, situated in the north-east of the country, is one of the Tunisia's 24 governorates. Its economy is based first on agriculture—especially olive oil—and second on industry. The industrial fabric consists of 607 industrial enterprises operating in different sectors such as construction products, ceramics and glass, electrical and electronic equipment, chemicals, and so on (TIP 2018). Yet, textiles remain the main pillar of Monastir's industry with 431 enterprises (71% of total industrial enterprises). However, 80% of them are manufacturing for export, and most are small SMEs (less than ten employees) (Hassine 2017).

Despite the competition from Asia, there are 54 companies owned and managed by women, or 12.3% of the 431 enterprises in the sector. Eight out of 54 are owned by foreigners and 46 by Tunisians. As regards the workers in the sector, 86% are women, the majority (80%) aged between 16 and 35 (Hassine 2017). So, since few studies discuss the characteristics of women entrepreneurs in the textile industry in Tunisia, this section presents the case of women entrepreneurs in Monastir, because it is the most dynamic region in Tunisia as regards the textile industry.

In according with the literature, on female entrepreneurs, we will discuss various categories: the size of their companies, their education level, their motivations, the obstacles they encounter, companionship and the influence of the socio-cultural environment (Alexandre 2016).

As regards their motivation, we quote the push/pull factors proposed by Malach-Pines et al. (2010). These authors declare that women in developing countries are more in a push situation, while in a developed country, women are more in a pull situation. Various factors can be considered obstacles: financial issues (Zouiten and Levy 2005); the socio-cultural environment (Alexandre-Leclair and Redien Collt 2013); and the balance between personal and professional life (OECD 2012). As regards company size, Davis and Abdiyeva (2012) state that women's ventures are smaller than men's. Support and companionship seem to be more important for women than for men (Carrier et al. 2006). Level of education, the OECD (2012) states that it is the nature of the education that influences women's entrepreneurship and not the level.

3.2 *Methodology*

We began our qualitative research based on the experiences of 18 women in Monastir by identifying 46 Tunisian female entrepreneurs. We targeted 23 enterprises for our survey. Five were removed because of non-response or incomplete answers. Our final sample was therefore reduced to 18 observations, i.e., 39.1% of the women entrepreneurs in the textile industry in Monastir.

Data was collected from a questionnaire consisting of 34 open and closed questions. The questionnaires were completed in face-to-face interviews with 12 enterprises and phone interviews with the remaining six.

The collected data was analyzed using Sphinx Plus[2] (v5), which is regarded as one of the most appropriate software packages for questionnaires combining closed questions and qualitative open-ended questions (Yacoub 2013).

3.3 Results

3.3.1 Size and Company Profiles

According to our research, 83.3% of the surveyed companies are totally exporters, even though, they are mostly small (50%), and medium (44%) companies.

Our findings tally with the composition of the industrial sector in Tunisia, where small and medium enterprises (SMEs) represent more than 70% of industrial enterprises (TIP 2018).

3.3.2 Entrepreneur Profiles

According to our research, the average age of the entrepreneurs when creating their business is 31.6 years, the youngest being 23 and the oldest 48 years old. This average age is younger than that of women entrepreneurs in France, for example, where it is about 52 (Baromètre femmes entrepreneurs 2013).

As regards respondents' academic background, results show a fair distribution (50%) between secondary and tertiary education. The nine businesswomen who had tertiary education are distributed as shown in Table 1.

Note that only one of the nine higher-educated entrepreneurs have a degree related to their current business (textile engineering), while five women studied business and economics which can help to manage a business. Yet the academic background of the remaining three entrepreneurs has no link with business (chemical engineering, political science and French literature).

As regards marital status, six entrepreneurs (33.3%) were single at the time they created their own business. Four of the 12 married ones

Table 1 Women's tertiary educational background

Degree	*Number of observations*
Chemical engineering	1
Textile engineering	1
Economics and management science	5
Political science	1
French literature	1
Total	9

did not have children when they started. So ten women entrepreneurs (55.5%) did not have children when launching their projects, while two still do not. Not having children seems to be a major factor in women's decision to create their own business.

3.3.3 Entrepreneurial Intention Decision

Family (parents and husbands) is clearly the major determinant of female entrepreneurial intentions (for 94.4%) in the Tunisian textile industry. This finding is confirmed by the fact that all the respondents' families (parents, husbands, in-laws) welcomed and encouraged their decision to start their own business.

> My decision has been more than welcomed by my husband and my parents. Even my seven-year-old son was so happy to learn that his mummy was going to become a business woman that he asked me to buy Disneyland! (OBS. No. 8)

In addition, 38.8% of the entrepreneurs chose to undertake their own business according to their academic background. However, a large number of entrepreneurs (44.4%) mentioned other determinants that motivated their entrepreneurial decisions.

From answers summarized in Table 2, we find that the determinants for Tunisian women's entrepreneurial decisions are diverse, depending globally on the woman's character, marital status and educational background.

3.3.4 Motivations for Starting a Business

As regards the motivations for starting a business, the results are more homogeneous. Making profit is the top-ranked answer (88.8%), followed by the desire to be their own boss (66.6%) and self-achievement (61.1%). Other motivations like having a family member with experience in entrepreneurship and/or in the textile industry were in fourth (57.1%). However, having an entrepreneur family member is cited by only 38.8%. Since the 1990s, unemployment has been an increasing economic problem in Tunisia. With encouragement and financial assistance offered by the government, many graduates have decided to start their own business. In this context, for five women (35.7%), creating their own enterprises was mainly to cope with being out of work.

Table 2 Other determinants of entrepreneurial decision

	Nb. Cit.	*Freq.*
My own choice	4	50%
I was working at my current factory as a chief supervisor. One day the foreign former manager quit, the headquarters offered me his position and unexpectedly I became a business woman!	1	12.5%
It's my father's project. I've always been meant to work with him. It's the same for my brothers and sisters	1	12.5%
When I was an employee at a textile factory, I was ranked top of the candidates in a competition to benefit from a two-year professional training course in different European countries. During this training, I learned a lot about the sector and I met many representatives of international textile companies. It was there that I met the manager of the Italian United Colors of Benetton and decided to start my own business in 1991 as a subcontracting manufacture for UCB. We still work together to this date	1	12.5%
When I created my first enterprise I was young and just married. It was so boring staying at home doing nothing but chores. So I decided to launch my own small project	1	12.5%
Total OBS.	8	100%

> I was jobless for a while. I understood that I would never be able to find a job related to my political sciences bachelor degree. So I decided to follow a textile training and to undertake my own business. (OBS. No. 6)

Having a flexible timetable and working near home was mentioned by 21.4% of the entrepreneurs.

3.3.5 Motivations for the Textile Industry

The analysis of women's motivations for the textile industry reveals five main factors. The most cited ones are family experience (33.3%), and their passion for fashion and clothing (33.3%).

> Since I was a kid, I have always been passionate about clothing. I used to dress my dolls with table napkins and towels. So becoming a textile entrepreneur and dressing people was simply a dream coming true for me (OBS. No. 2)

Further, 33.3% of the women declared they had chosen the textile industry because it was easier to manage than other sectors like chemicals.

Measures of easiness were quality standards, the amount of capital required and access to information from other firms. Another characteristic mentioned was that most of the textile industry's workers are women, which makes it easier for women entrepreneurs to deal with them.

> Textiles had never been in my mind when I graduated as a chemical engineer. However, in Monastir there's a big concentration of textile firms. So it was quite easy to find information about the market and the different procedures. Besides, quality standards are easier to build up in textile than in complex sectors like chemicals or pharmaceuticals. (OBS. No. 9)

The two other motives for choosing the textile industry are related to personal experience (16.6%) and favorable public policy towards this sector (11.1%).

3.3.6 Obstacles

All respondents affirm having faced obstacles when starting their business. Administrative problems were top of the list (77.7%) followed by financial issues (55.5%) and difficulties combining family and business (38.8%).

Administrative issues relate mainly to bureaucracy and cumbersome procedures leading to delays in starting production. This is annoying, particularly for subcontracting firms that have commitments to their foreign partners.

Shyness and lack of self-confidence were in fourth place (22.2%) and were cited by respondents who started their business at an early age. Another obstacle cited by 22.2% of the entrepreneurs was the negative influence of the in-laws.

Tough competition was an obstacle to 16.6% of the entrepreneurs. Only one respondent claimed not to have experienced any obstacle since it was her father's project.

Six women (33.3%) cite other current obstacles. They are mainly related to the global economic and political instability following the Jasmine revolution (50%) and to the crisis of the textile industry in Tunisia (33.3%).

> After the Jasmine revolution, labor unions have become more active leading to frequent strikes and disruptive behaviors of some workers. (OBS. No. 5)

Common to all the entrepreneurs was the answer that being a woman has never been an obstacle for their business as regards financing, administration and competition issues, either currently or when starting out. Yet 50% state that being a woman entrepreneur is an obstacle as regards family–business balance.

> When it's about housekeeping and raising children it's always a women's issue. So from this perspective, yes, being a woman is an obstacle to running business. (OBS. No. 13)

Solutions to these different obstacles vary among the respondents. Nevertheless, the majority (94.4%) claimed the support of their parents was necessary to achieve a fair-enough balance between family and business. As for administrative issues, it seems that there is no effective solution but socializing with agents (22.2%). Financial issues are overcome using family savings (16.6%) and loans (11.1%).

3.3.7 Support Structures

This part of the survey was intended to evaluate the effectiveness of different support organizations for women entrepreneurs in the textile industry. We asked them about four main actors: people helping with starting and running the business; institutional support; companionship structures; and belonging to any women entrepreneurs' network.

In both phases, starting and running the business, parents and husbands are the most frequently cited as helping the entrepreneur. At the starting stage parents come first at 83.3% (against 55.5% for husbands), while at the running stage husbands come first (66.6% against 50% for parents). This finding is simply explained by the fact that 33.3% of the respondents were single when launching their business.

Another finding is the low rate of support structures either during the launching (16.6%) or in the day-to-day running (22.2%) of the business. Three structures were mentioned by respondents: the Monastir textile cluster (cited by three entrepreneurs); the textile technical center, which is a technical structure within the textile cluster (also cited by three entrepreneurs); and a private consulting bureau specialized in the textile industry (mentioned by one entrepreneur). Actions offered by these structures are mainly training and technical advice. Only 37% of the women were aware of the existence of such institutions.

3.3.8 The Socio-Cultural Environment

The women were very positive about Tunisian culture. They stated four main advantages for women entrepreneurship in the textile industry in Tunisia. First, all described Tunisian society as open-minded. Second, 94.4% declared that women enjoy entirely equal rights with men in business. Third, "respect towards women" is an advantage cited by 27.7% of the respondent, followed by "modern culture" with 16.6%.

> Our Tunisian culture towards women doing business is just amazing! It combines open-mindedness and respect. This is uncommon within Arab countries. (OBS. No. 11)

Nevertheless some gaps cited by 14 businesswomen distort this idealistic image. The three main factors in these gaps are presented in Table 3.

Social gaps are mentioned by 28.5% of the business women, declaring that although nowadays an increasing number of Tunisian husbands do help with housekeeping and childcare, women remain too engaged as wives and mothers at the expense of their responsibilities as entrepreneurs.

Cultural gaps consist of two major factors. The first is the presence of regional differences as regards equality between genders (cited by two entrepreneurs).

> But let me highlight that open-*mindedness isn't alike within the whole country. Unlike the region of Monastir, in some Southern and Western regions of Tunisia, some male workers still find it unusual to work for a female boss. So there's still much work to do to overcome this problem on the national scale.* (OBS. No. 8)

Table 3 Gaps for women's entrepreneurship in Tunisia's textile industry

	No. Cit.	*Freq.*
Social gaps (too much engagement towards family)	4	28.5%
Cultural gaps	3	21.4%
Male workers' disruptive behaviors towards business women	2	66.6%
Regional disparities	1	33.3%
Institutional gaps	5	37.5%
Lack of specific support for women entrepreneurs	5	100%
Lack of networking between women entrepreneurs	2	40%
Total OBS.	14	–

The second main factor relates to disruptive behavior by some workers (especially men) and is mentioned by one entrepreneur. The reasons for this behavior is usually linked to pay claims.

> After the revolution, workers have become more and more demanding. Sometimes it's awkward to deal with some disruptive behaviors coming specifically from male workers. (OBS. No. 17)
>
> The textile industry in Tunisia is struggling. The situation can be described as 'alone against all': intensive foreign competition, a lax attitude of the government and frequent labor unions' strikes. There is an emergent need of an efficient public policy to fix these issues and to help our textile industry regain its attractiveness. (OBS. No. 15)

The lack of support from public institutions during the launch and the day-to-day running of the business is cited as a major gap for entrepreneurship in Tunisia by 37.5% of the women. All of them cite the lack of specific financial, managerial and technical support for female entrepreneurs, while 40% highlight the lack of networking between businesswomen operating in the textile industry, in spite of their geographical proximity.

> There is a lack of genuine accompanying for young women with ingenious and innovative projects' ideas but can't carry them out without efficient public aids. (OBS. No. 15)
>
> I think there is a lack of collaboration between the actors of the textile industry (industrials, public institutions, research units, universities). In the spot, the textile cluster of Monastir doesn't play the role it's meant to play. So I think the government must intervene to overcome this failure in order to strengthen our textile sector's position. (OBS. No. 18)
>
> Tunisian women entrepreneurs need to benefit from favoring financing advantages, coaching, training and so on. I think the Tunisian government should support female entrepreneurship because women are more cautious than men and they always achieve their goals with the minimum of risks and expenses that means they are economically more efficient! (OBS. No. 7)

3.4 Conclusion

Women entrepreneurs are a minority in Monastir, representing 12% of all entrepreneurs in the textile industry. But they are young (average age 31.6 years) and manage SMEs, a result that concurs with that of Davis and Abdiyeva (2012). As regards the educational level, 50% of the women have a second degree and the other half have a bachelor's degree. Even though most of these women studied business administration, we cannot state that they have chosen the textile industry because of their educational background, which is in contradiction with the OECD (2012). They are mostly exporters (working as subcontractors for foreign companies, especially European ones). However, according to our study, the overall Tunisian environment is favorable for women. Female entrepreneurial intentions and motives depend essentially on family support and predisposition to provide help. As regards motivation, our study demonstrates that the Tunisian women's strategy is more push than pull, with a minority declaring that they have created their business because they were jobless. This result contradicts that of Malash-Pines et al. (2010) who declared that women in developing countries are more in a pull than a push strategy.

As regards the obstacles, most of the women claimed not to have experienced socio-cultural obstacles (in contradiction to the suggestions of Alexandre and Redien-Collot (2013) who pointed out that women in Arab countries are negatively influenced by the cultural environment), but they are more likely to face administrative issues. Financial issues are resolved in general by the support of their family (husbands and parents) because there is no support from private or public institutions. Indeed, the government demonstrates a lax attitude to textile entrepreneurship in Tunisia rather than enforcing favorable industrial policies in support of it. The textile cluster in Monastir is supposed (through its financial, technical and research institutions) to assist future entrepreneurs in the different stages of the launching of their enterprises. It is also supposed to support established entrepreneurs in their day-to-day operations. According to our results, there is a significant gap between the industrial policy's objectives and mechanisms on the one hand, and the actual achievements on the other hand.

Most of the recommendations suggested by the women textile entrepreneurs addressed this point. Most of the businesswomen would like policies specifically advantageous for Tunisian women entrepreneurs (72.2%) and a reduction in administration procedures (55.5%).

As a key sector for the Tunisian economy, public policy mechanisms that genuinely support the textiles industry must be implemented in such a way as to help this industry face intensive international competition, especially from Asia. Four main mechanisms must be targeted: financial, managerial, administrative and technical support.

On the other hand, female networks are a great channel to develop business and for psychological support. They also enable issues linked to entrepreneurship in general to be more effectively presented to government. We therefore encourage these women to create associations for discussion and to address their needs and problems.

4 Ghana: An International Reference for Sustainability Fashion in Africa

4.1 Introduction

Ghana is a West African country formerly known as the Gold Coast, which gained its independence in 1957 and has a population of over 25 million (BBC 2018). It was the first sub-Saharan African country to break loose from colonial rule and this was a big catalyst for the independence of other countries within the West African sub-region. In addition to its leadership on the political front, the country has also been regarded as one of the leading countries across the continent in various areas of human endeavor, such as sports, education, music and fashion. The value of the global fashion market is currently over US$1.5 trillion while that of Africa is over US$32 billion (Toesland 2016), to which the Ghanaian fashion industry is deemed to be contributing its quota. The industry in the country has been growing over the years, with different brands springing up each year and hitting the global stage with amazing designs and products carrying the Ghanaian culture along with them. This case study will just focus on two such brands: AASK (fashion accessories) and KIKI Clothing (fashion designerwear and footwear). The fashion industry was given a boost in 2004 when the Federal Government of Ghana introduced National Friday Wear which encouraged people to wear local fabrics and designs to work on Fridays. There are many fabrics of Ghanaian origin but the most popular is kente, which was originally worn by only the highest social classes but has become available to everyone in recent times.

The concept of sustainable fashion refers to clothing that combines fair-trade principles with sweatshop-free labor conditions and does not harm the environment or workers (Shen et al. 2013). A company known as Green Strategy has presented the concept as being about the various processes of fashion from production to end user that takes into consideration its impact on the environmental and socio-economic aspects of society (Arrayales 2016). The company went on to list seven ways in which the concept can be expressed, three of which we have chosen for review in our case studies. These are: the product being made locally; using materials that are green; and ensuring that they are of the highest quality, especially when handcrafted. The two companies chosen were picked mainly based on their reputation as firms that are interested in the concept of sustainable fashion, and are known to follow up their interests with action. To give further credence to their approach to fashion, they are both members of the International Trade Center's Ethical Fashion Initiative in Africa. We will discuss how they have applied these aspects of sustainable fashion in their operations.

4.2 Case 1: AAKS (Fashion Accessories)

AAKS is a Ghanaian company founded in 2014 that produces fashion accessories, its main product being combined raffia and leather bags. The company was founded by Akosua Afriyie-Kumi to demonstrate the special weaving techniques involved to a world audience. These traditional weaving techniques are still maintained today, with local women artisans from Bolgatanga in the northern region of Ghana responsible for the production of these bags. This is a core part of the company's operations, as they pride themselves on being at the forefront of projecting and celebrating the craftsmanship of African artisans, especially women.

The company currently has over 50 local workers who have been empowered through their employment as weavers. The continued engagement of these women further creates opportunities for families that might not otherwise have survived to experience some of the good things in life.

The final product is a blend of tradition and modernity. The company is constantly experimenting with new materials, but they are all eco-friendly. The handbags are made using ecologically harvested raffia from family farmers in Ghana. They utilize as much of every raffia as possible and reserve scraps for smaller bags. The use of natural fibers and emphasis on the handcrafted technique means each bag is unique. A sophisticated dyeing process is formulated in house to create exclusive seasonal colors. The final designs are modern and exclusive styles, so they are made by hand using traditional methods.

The company's bags are currently sold in over 60 stores across the world.

The company's ethical stand as a sustainable fashion company has been given further credence by its listing as a partner of the International Trade Centre's Ethical Fashion Initiative in Africa. Since its launch in 2014, the brand has been popular around the world, with features in global brands such as *Vogue Italia, Elle Decoration, Vogue, CNN, Forbes Woman Africa, Guardian UK* and a host of other international publications.

In this way, the company continues to put Ghana and Africa generally on the map. In an interview about their weaving techniques with the *Guardian* in 2015, the founder stated: "It's a skill that has been passed on from generation to generation – I'm harnessing their skill, so that people can hear about it internationally. It's placing a bit of a spotlight on the weaving techniques that we have here." As a result, the company maintains active social media accounts that help take the message to the far reaches of the world, ensuring that more people get to appreciate the beauty of African fashion, while emphasizing its sustainable nature.

In addition to the environmental sustainability of its products, AAKS is a company committed to the defense of African women. One way to promote the talent of women is through fashion. The company considers that education is a powerful tool in the empowerment of women, but also believes that local government should contribute by supporting local talent and favoring their presence at the international level.

4.3 Case 2: KIKI Clothing (Fashion Designerwear and Footwear)

KIKI Clothing is a Ghanaian fashion company founded by Titi Ademola in 2002, which prides itself in the promotion of "Made in Ghana" products. The company, which started out with the design and production of children's clothing, has now metamorphosed into the production of womenswear, childrenswear, and footwear for men, women and children. The production process hinges on the company's philosophy of creating comfort and wearability for their clients while also ensuring that there is no compromise on meeting the clients' style demands and expectations. In order to achieve this for close to two decades, the company has maintained its tradition of handmade construction of products using vibrant

West African prints. This means a reliance on eco-friendly materials that are mainly locally sourced as well as the engagement and empowerment of the local workforce in Ghana, which includes women.

The brand continues to strive for the highest of standards and this is achieved by getting the right materials and people, thereby ensuring that the end user is getting value for money. This means that the clothes sold by the company have a higher chance of lasting longer than some other clothing from brands that are keener on mass production. KIKI Clothing sells its womenswear, childrenswear and footwear across the world and online through their online store, and is worn by celebrities. Social media outlets are well used, and this in itself is a form of sustainable fashion as use of these platforms reduces the impact of the business on the environment, with fewer publicity materials needing to be printed for marketing purposes.

The company is listed as partner of the International Trade Center's Ethical Fashion Initiative in Africa, which indicates endorsement of the brand's role promoting sustainable fashion, especially across the African continent. In its close to two decades of operations, the brand has been recognized by major media players in the industry such as *Vogue Italia, Elle Italia, The Daily Telegraph* (UK), *Glamour Magazine* (SA), CNN, BBC and other leading media outlets. KIKI Clothing has also had its ever popular Handkerchief hem dress photographed by Mario Testino for *Vogue US* and worn by Academy Award-winning actress Lupita Nyong'o. Aas a measure of this brand's popularity on the international fashion market, it has also been featured and celebrated on the red carpet by Hollywood actress Nicole Ari Parker and reality star Tiffany Jones. It has continued to be featured on different catwalks across the world, including Exopa Ghana Fashion Week, Face of Africa launch in Ghana, Altaroma Altamoda in Rome, Mercedes Benz Africa Fashion Week in Johannesburg, Arise Magazine Fashion Week in Lagos, African Prints Exhibition in Los Angeles and Africa Fashion Week in London. This is in addition to exhibiting opportunities in Accra, Lagos, Mauritius, Johannesburg, Rome and London.

All this international exposure tends to confirm what the founder is quoted as saying about internationalizing African fashion: "we need to take advantage of this time when wearing African is acceptable in the fashion world, and make the most of it" (Back 2012). On the company website she offers a further explanation:

> I wanted to give credence to the magnificence of Africa's distinctive creative and artistic ability, through the production of exquisite and wearable clothing and accessory items. Items which speak to Africa Rising. Items which speak to contemporary, fashionable, Afro-politian Africa. Items which speak to the distinct, unique stylistic preferences and trends of her people.

Interestingly, the company is also associated with humanitarian activities that impact the lives of people who might not have had the chance of a good life if it were not for the company's support. It supports the Osu Children's Home Orphanage in Accra, Ghana as well as being involved in different charitable activities or projects, one of which is the Walk The World project which seeks to bring an end to hunger by providing food for the millions of starving children across the African continent.

4.4 Conclusion

From the brief discourse presented above, it is clear that the idea of sustainable fashion in Africa, while it may not be very popular at the moment for various reasons, is still gaining momentum as a result of the activities of some brands within the African fashion industry. The two cases presented can be seen as good examples of how Ghanaian culture is being exported to the rest of the world via the design and crafting of clothing and fashion accessories for men, women and children. They have continued to contribute to the advertisement of the continent in general and Ghana in particular, while also impacting the local economy of the country.

However, much remains to be done. As both entrepreneurs point out, sustainable fashion offers an important development opportunity to the Ghanaian woman. The consumer values products made with traditional techniques using sustainable materials, and that is something that the women of Ghana know how to do. However, and in order to improve their position in the industry, comprehensive training needs to be provided for women, and there is also an urgent need to develop government policies that support the activities developed by this group.

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CHAPTER 8

Discussion, Conclusion and Recommendations

Carme Moreno-Gavara and Ana Isabel Jiménez-Zarco

Throughout the last six chapters, this book has analyzed in depth a recent, and to some extent hopeful, phenomenon—the development of an entrepreneurial movement of women in Africa. It has also focused on the main areas of fashion-sector activity and noted that sustainability is the element that establishes differentiation and increases the value delivered to the consumer.

We have also seen how the "traditional"—both the use of natural resources and the people who make products—which until recently was considered of little added value, can now be the basis for starting a valuable business activity that has a good chance of consolidation and growth in the not too distant future.

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It is evident that entrepreneurship offers essential economic and social benefits to any territory; but if, as in this case, compared to its closest competing environments—Europe and Asia—the territory presents one of the lowest rates of economic development, and one of the highest rates of inequality and poverty, then the analysis of the entrepreneurial phenomenon and the keys to its potential success becomes much more interesting.

1 Africa: A Continent in Sustainable and Non-Inclusive Growth

From the West, when thinking of Africa, it is difficult to avoid two preconceived ideas: that Africa is a continent condemned to poverty; and that Africa is a single integrated territory, where the fate of some is bound to that of others.

In 2000 *The Economist* called Africa the continent without hope, but in this case, the forecast completely failed. Since the beginning of this century, Africa has experienced a real take-off, especially the poorest countries. If we look at the 46 countries that make up sub-Saharan Africa, we observe that between the years 2000 and 2015 they recorded annual economic growth of 6.2%, far surpassing the economic growth of Latin America. Likewise, five of the ten economies that grew the most in 2015 were African: Côte d'Ivoire, Ethiopia, Tanzania, Rwanda and the Democratic Republic of the Congo, all of which increased above 7%. This situation has led to improvements in various areas such as employment, investment, infrastructure development and the provision of social services.

However, the data provided by the UNCTAD report of 2012 indicate that the current pattern of growth is neither inclusive nor sustainable. First of all, African countries depend to a large extent on natural resources as engines of economic growth. But most of these resources (fossil fuels, metallic and non-metallic minerals) are not renewable and are being depleted at a very rapid pace with negative consequences for future growth and sustainability. The dependence on resource-based growth is also a concern for African policymakers because commodity prices are very volatile and subject to the vagaries of global demand. This price instability has negative consequences for investment and makes macroeconomic planning a challenge.

Second, agricultural production per capita and productivity in the region remain low compared to the world average. But in the past, the growth of agricultural output has been driven to a large extent by an expansion of the cultivated area rather than an increase in productivity. With the increase in the density of the rural population, the size of farms has diminished, and more and more people have been forced to move to less fertile lands. This situation has serious consequences for food security and social stability since the sustainable intensification of agricultural production is necessary to boost productivity and improve food security in the region. In 2012, the African Development Bank estimated that Africa's per-capita agricultural production was about 56% of the world average. Also, it is estimated that around 30% of the total population of sub-Saharan Africa suffered malnutrition in 2010 (Food and Agriculture Organization of the United Nations [FAO] 2010 and the World Food Program [WFP] 2010).

A third characteristic of the current pattern of growth in Africa is the strong deindustrialization. Although this phenomenon is evident in all economic sectors of activity, the decline in the share of manufacturing in Africa's production is worrying because historically manufacturing has been the main driver of high, rapid and sustained economic growth in virtually all countries. The main fall in manufacturing activity was in West Africa, where it fell by around 8 points during the period from 1990 to 2008. In other areas, the reduction in growth was less significant, falling from 13 to 10% in East Africa, and between 3 and 5 points, respectively, in Northern and Southern Africa.

In addition, Africa has experienced rapid urban growth. The proportion of the urban population in the total population is currently around 40% and is projected to increase to about 60% by 2050. Historically, industrialization and agricultural transformation led by industry have been important drivers of urbanization, enabling the absorption of manpower transitioning from the rural to the modern, urban sectors of the economy. However, as Jedwab (2012) points out, this phenomenon has been driven by exports of natural resources. The explanation is simple: the income from natural resources in Africa is spent mainly on urban goods and services, making cities relatively more attractive and extracting labor from rural areas.

Recent evidence shows that Africa has undergone a process of structural change in the last 20 years, but it has not been a structural change that improves productivity. The growth model has been based on the development of basic activities, with little added value and intensive unskilled labor. This fact is very worrying given that the region has a young and growing population. This is especially so when a part of this population, as is the case for women, lives in inferior social and economic conditions. According to the Population Division of the United Nations, by the year 2050 the population of Africa between 15 and 24 years. Also, the population projections made by this same agency (UN 2018) indicate that the population of working age in Africa is growing by 15.3 million people per year, and this number is expected to increase in the coming decades.

Having a young and growing population presents opportunities in terms of abundant labor supply with a lot of creative potential. But it also means that African countries should embark on growth paths that generate large-scale employment to absorb all the additional labor. In particular, they should move away from growth strategies without employment, and adopt those that favor sustainable and inclusive growth.

2 The Current Economic Challenges and the Keys to Structural Transformation

In order to achieve the desired high and sustained economic growth, African countries must go through the process of structural transformation. Sustainability and inclusion favor an increase in high-productivity manufacturing and modern services, accompanied by an increase in agricultural production. However, if this transformation is to overcome the crucial challenges facing the continent, a long-term time horizon, accompanied by critical economic efforts and social changes, is required.

These changes include:

a. the need to change the role that Africa has played internationally;
b. the strengthening of some local industries as a source of growth;
c. the development of a sustainable economic growth model; and
d. the inclusion of women at the economic and social level, favoring the entrepreneurial initiative.

Developed economies have always shown an interest in Africa, especially as a source of raw materials and cheap labor. In the past Africa has been exploited by the great colonial powers; now it is the turn of the large multinational companies, which have found in the African continent an ideal place to locate production, either by constructing productive plants or by hiring local companies to develop specific production activities.

This has been the reality in a great many sectors, including technology, construction, tourism, finance and health services. As far as the fashion industry is concerned, large international companies have opted for offshoring and outsourcing policies to reduce their production costs. Since the beginning of this century, international companies have invested abundant resources in Africa, accessed quality raw materials at low cost, and been able to hire a poorly qualified labor force. However, their investments have not improved the economic situation of the companies in the sector, nor the social conditions of the population or the territories where this activity takes place.

In the short term, outsourcing and offshoring part of the productive activities to developing countries is beneficial for both parties (companies and countries receiving investment). But in the medium and long term it does not benefit the host country, which: (1) specializes in low-added value industrial production; and (2) becomes highly dependent on the outside, making its future economic and social development contingent on the decisions of international companies.

African governments have responded to these challenges by renewing their political commitment to structural transformation and adopting initiatives at the national and regional levels aimed at strengthening and diversifying their production and export structure, in order to consolidate a robust local industry capable of employing a qualified population. But structural transformation is a double-edged sword: although it is necessary for sustained growth and improvements in the social and economic conditions of the population, it carries a heavy environmental cost burden. This is of particular significance when governments do not have the resources or fail to take adequate measures to reduce environmental damage.

Historically, the transition from a socio-ecological agrarian regime to an industrial one has been an essential contributor to environmental pressures, and the more rapidly this occurs, the more serious the situation, with problems ranging from climate change, waste pollution, deforestation, desertification and the degradation of freshwater resources, to the loss of biodiversity. The structural change so necessary for the growth of African economies must not be achieved at the expense of social and environmental sustainability. Therefore, as efforts to transform their economies increase, African governments must also seek to improve the efficiency of resource use and address the adverse environmental impacts of structural transformation.

But the necessary structural change must also aim at economic and social sustainability through equal opportunities and the inclusion of all individuals. Africa undoubtedly presents significant inequalities, especially regarding women. The human development reports produced by the United Nations (UN) show that although almost 50% of the world population is female, in certain places they are usually excluded from the opportunities to grow and develop socially or economically. Of the 20 countries that are the worst to live in as a woman, 16 are in the African continent, with Niger, Somalia, Mali and the Democratic Republic of the Congo heading the list. Lack of access to education and financial services, legal blockades and poor political representation are some of the barriers that women in Africa must overcome.

Since African women maintain 90% of the informal economy, produce 80% of the food and support more than 40% of the continent's families, measures that eradicate poverty and endow women with rights and opportunities will in every way favor the sustainable growth of Africa, both economically and socially.

3 The Sustainable Fashion Industry as a Growth Engine

The principal reforms undertaken by local governments are probably in the field of infrastructure and education. Strong public investment in both physical and technological infrastructure is essential to the take-off and later the economic development of the country. While the existence of raw materials may be an attraction for foreign investors, the provision of infrastructure increases the likelihood that the investment will be consolidated and will translate into production centers and employment creation. On the other hand, public investment in education and training not only guarantees a more stable society but is also possibly the most profitable in the medium and long term, contributing as it does to the formation of human capital and the acquisition of skills that are fundamental to the success of companies. Such reforms should be aimed at promoting the development and consolidation of economic activities in which Africa not only shows high growth potential but also a significant competitive advantage, given its capacity to produce products with high added value. These include sustainable agriculture and the fashion industry.

In business, it is well known that differentiation is the key to success in the end market. A company's competitiveness depends on its ability to offer products that meet the customer's needs at the highest level. However, in today's dynamic and complex competitive environment, business strategies that were effective only 10 years ago no longer work. With supply far exceeding demand, an increasingly demanding and informed client is seeking to satisfy social and hedonistic needs. Clients value products that are different from the rest because they: (a) are unique and exclusive; (b) offer satisfactory experiences; or (c) are sustainable, use natural components (environmental sustainability) and favor the economic development of the territory (social and economic sustainability).

Exclusivity and sustainability combined guarantee success in many sectors, but especially in fashion. The market demands artisan products with exclusive designs using environmentally sustainable materials and processes. Big international fashion companies have begun to see in Africa a source not only of resources, but also of inspiration. The fabrics, colors, designs and traditional forms of production are used by big fashion brands, together with talented local young designers, for their collections, demonstrating to the world the high potential of the sustainable fashion sector for Africa.

Africa is among the leading producers of raw materials used by companies in the fashion sector, especially the textile subsector. The excellent quality–price ratio of the cotton, fibers and natural dyes produced in Africa has led to their being widely demanded in both the domestic and international fashion markets. However, these raw materials have traditionally been produced by environmentally unfriendly practices that use large amounts of water and chemical fertilizers. In this context organic farming offers many benefits. Some African countries have begun introducing new technology and production systems that help protect the environment, while also increasing productivity and thus improving the living conditions of their people.

To maintain a competitive advantage, sustainable fashion requires not only sustainable raw materials but also production processes that are efficient, fast, save energy and do not pollute. In many cases, the key to making these processes both efficient and sustainable is the use of traditional production methods developed from new technologies. In other cases, the physical, logistical and technological infrastructure enabling a balance between efficiency and sustainability is required.

It is the intensive use of technology that has developed machines making the production process faster and less costly, and the resultant products of better quality. The use of information and communications technologies (ICT) makes the productive activity more efficient, giving support and speeding up other processes directly linked to production, such as communication between the different members of the value chain. Finally, the direct and interactive communication between the company and its markets enabled by ICT also increases the efficiency of other business processes linked to knowledge of the market, or sales and distribution.

Technological development has changed the way companies and consumers interact in the market. The internet and Web 2.0 have created a new environment with a global reach, where: (a) all economic and social agents can communicate; and (b) there are no temporal or spatial barriers. The client can express opinions and describe their experiences through the network, influencing other clients with informative content that impacts the company image. For its part, not only does the company have a new relationship and communications channel with its customers, it is easier and faster to access, manage and use information, both its own and that of the other agents in the supply chain.

However, the use of technology requires personnel highly trained in not only technological but also other skills, including soft skills such as critical thinking, teamwork, the use of digital media, and innovation and entrepreneurship. The higher their degree of training, the greater is the workers' ability to resolve problems. Their level of satisfaction and commitment to the company will also be higher when they feel proper attention is being paid to their training (Meyer et al. 2004). Training increases autonomy. A worker with a professional qualification as well as business experience has already met some of the criteria for becoming an entrepreneur.

But a second transformation—the social one—is also needed if the fashion sector is to become a growth engine for Africa. About 80% of the workers in the fashion sector in Africa are women, so empowering this group by investing in their development, training and autonomy will achieve sustainable growth in economic and social terms in the region.

To start a company is not easy, especially in the economic, political and social instability present in some African countries. Entrepreneurship is hard because it demands many sacrifices from the entrepreneur. It is risky, with little or no guarantee of business success. Finally, multiple barriers can hinder the creation and start-up of a new business. If this work is complex for men, for women it becomes an almost impossible task. But many women have no alternative because this is the only way to escape from poverty, vulnerability and social exclusion, or because third parties—usually children and the elderly—depend on them for their subsistence.

4 Female Empowerment in the Fashion Industry: Inclusive Growth Engine

The economic crisis that began in 2008 has highlighted the importance of entrepreneurship as a driver of economic and social development. There has been a particular focus on female entrepreneurship because of the number of women entrepreneurs and the economic impact of their activity (Mitchell and Marion 2011). However, female entrepreneurship is understood differently in different places. While in developed countries it represents a professional opportunity, in developing countries it is the only way for many women—and their families—to survive.

Hillary Clinton noted: "Globally, women are treated as less than equal to men in almost all the countries. Women make up 50 percent of the global population, 40 percent of the global workforce, yet only about 1 percent of the world's wealth" (Bajpai 2014). According to a 2018 McKinsey report, women's unemployment level is higher than men's both in educated and less educated categories. Given the opportunity, women invest the majority of their income in their families and communities, but unfortunately, most women experience unnecessary barriers limiting their ability to fully participate in the economy. Studies have drawn attention to the need to invest in the development of women, especially in developing countries, as a way to improve the growth, prosperity and sustainable development of their families, and therefore, of their countries (McKinsey 2018). Recent experience has shown how the number of women playing an active role at different levels of social, economic and political life has increased, achieving significant results. International organizations, governments, the private sector and citizens in general have all become aware of the need to reduce the gap between men and women.

Equal opportunities for men and women are among the 17 sustainable development goals that make up the UN 2030 Agenda. Likewise, the importance of equal opportunities for sustainable development has been recognized by the African Union in its 2063 Agenda, which proposes: (1) to achieve full gender equality in all spheres of life; (2) to eliminate all forms of discrimination in the social, cultural, economic and political spheres; and (3) to achieve parity by 2020 in public and private institutions. The commitment of African governments to this particular goal has been demonstrated by the ratification of the Convention for the Elimination of All Forms of Discrimination against Women (CEDAW) by 51 of the 53 African countries. The African Union has declared the years 2010–2020 the Decade for African Women, clear examples of a strong commitment.

Despite these actions, the situation of women in Africa remains serious. Millions of women face multiple barriers due to the fact of being a woman. In some countries, they are in a situation of extreme poverty and vulnerability; in others, although their situation is somewhat better, they continue to be an invisible collective experiencing wide inequality with men.

Social norms, beliefs and even laws have established a situation of widespread discrimination against women in the African continent, generating, throughout the different stages of their lives, barriers that prevent them from advancing, developing and participating fully in society. In a society where freedom of decision and action is limited, women experience serious problems accessing such basic things as education, finance or work.

Cultural and traditional practices in many countries not only favor this situation but also protect laws that aggravate it. Despite the progress made in schooling, a large number of African girls do not attend school. According to UN Women (2018), approximately 49 million girls are outside the education system in sub-Saharan Africa. But even girls who do attend face barriers that make it difficult for them to continue primary, secondary and, of course, higher education. In addition, the dropout rate is high, mainly due to child marriage, sexual violence and/or teenage pregnancy. As a result, African women have the highest illiteracy rates in the world. Lack of training increases the female unemployment rate, relegating women to the informal sector, with no security and no formally recognized labor rights.

Legal barriers deny women access to property inheritance, or leave them totally dependent on fathers or husbands to get a job, open a bank account or request a passport. To this is added the overload of work at home, and the difficulty of participating in certain social and political activities. In short, the African woman finds herself in a situation where lack of access to resources and services, and lack of decision-making power, even in her own home, limit her ability to act, especially when it comes to developing a career.

However, whether out of necessity, or pure entrepreneurship, women are starting to occupy a prominent place in the African economy. For example, women produce more than 80% of the food for sub-Saharan Africa, and more than 34% for North Africa and the Middle East. A large number of women around the continent have set up and are managing their own businesses, although success does not come easily for them.

A large proportion of female entrepreneurship occurs in the fashion sector—such as manufacturing handicrafts, or textiles and accessories. It is true that these are activities with a strong cultural tradition usually developed by women. But unlike in the past, at present these have high economic potential, given the strong demand for these products in developed countries. African products are in fashion since they are of high quality, use natural raw materials and are hand-made in a traditional way. These exclusive and sustainable—economically, socially and environmentally—products are in demand by First-World consumers looking for exclusive and sustainable products, which, when purchased, are helping the development of one of the most disadvantaged areas of the planet.

The fashion industry in Africa has developed significantly in recent years. Since the beginning of this century, the large multinationals in the sector, such as Inditex or H&M, have taken advantage of the quality of raw materials or low labor costs to outsource part of their productive activity and transfer it to countries of the African continent. The search for local suppliers, raw materials and production workshops has favored the development of a nascent industrial fabric around the fashion sector. The increase in international demand for African products has led some international companies to discover the real potential of the local industry. The creation of joint ventures with local partners not only strengthens their presence in the continent but also guarantees the development of a productive activity with higher added value, because the company commits financial, human and technological resources to its development. But along with the initiatives developed by private companies in the sector, the commitment of other national and international economic and social agents is necessary.

Support programs developed by governments, institutions and private organizations can promote the transformation and consolidation of this industrial activity into one of high added value. The establishment of training programs to professionalize the workforce, train them in business management, or provide access to financial and technological resources, will allow local suppliers, mostly women, to develop new productive activities, innovate in those that already produce or gain autonomous access to new national or international markets. As Hilary Clinton says, "Women can be the rock on which a freer, safer, more prosperous Africa is built. They just need the opportunity."

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