DEVELOPMENT OF AN EFFECTIVE AND SUSTAINABLE SUPPLY-CHAIN-MANAGEMENT MODEL FOR SOUTH AFRICAN FASHION DESIGNERS IN THE RETAIL CLOTHING INDUSTRY

By

BOITUMELO POOE

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Principal Supervisor: Dr. Virimai Victor Mugobo

Co-Supervisor: Mrs. Albertina Kaimbo Jere

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DECLARATION

I, **Boitumelo Pooe**, declare that the contents of this dissertation represent my own unaided work and that the dissertation has not previously been submitted for academic examination towards any qualification. Furthermore, it represents my own opinions and not necessarily those of the Cape Peninsula University of Technology.

Signed: ________________________ Date: 13 April 2020

ABSTRACT

Like many other suppliers, South African fashion-clothing designers have dealt with a very competitive environment within the retail industry. Thus, this research study explored the most suitable supply-chain-management model for South African fashion designers to achieve efficiency and economic sustainability within the retail environment. In today's complex markets, the susceptibility of the supply chain is viewed as an ongoing issue for several industries and it is no different for fashion designers. As a result, in the past, the visibility of South African fashion designers in the retail environment appeared to be minimal. Matching the appropriate supply-chain-management model with South African fashion designers in retail was the purpose and core focus of this research study, as the "one size fits all" approach appeared questionable and perhaps unrelatable to SMMEs.

This research study explored the relationships between fashion designers and clothing retailers, together with supporting stakeholders such as government institutions, fashion councils, educational institutions, and the different consultants or agents. This was done to establish how the different parts could potentially function individually or collaboratively in order to develop an effective and sustainable supply-chain-management model for South African fashion designers in the retail environment. The primary focus and aim of the study was to assess the different functions within the supply-chain-management model and propose a more relevant model for South African fashion designers supplying the retail clothing environment.

To reach the objectives of this research study, the empirical information was collected through the qualitative approach, by making use of in-depth semi-structured interviews, as that allowed the participants to answer the questions unreservedly based on their own personal and professional experience. The problem this research study identified was that a significant number of South African fashion-designer brands struggled to maintain longevity and success within the retail environment, due to the supply-chain changes South African fashion designers experienced when supplying retail.

Through empirical research, it was identified that the supply-chain-management models available for retail clothing suppliers were designed for larger businesses and not specifically for fashion-designer businesses which were classified as small, medium and micro-sized enterprises (SMMEs). The findings revealed that, for the fashion and retail clothing industry to realise an effective and sustainable supply-chain-management model for South African designers, the supply chain required good communication and support. The study recommended the establishment of close-proximity hubs, with fashion clothing supply chain functions, in major South African metropolitan cities, which could possibly be achieved through specialised and regulated education and the formation of a national fashion council.

Keywords: South African Fashion Designers, Retail, Clothing, Efficiency, Sustainability, Supply Chain Management Model, Value Chain

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ABBREVIATIONS

B2B: business-to-business

B2C: business-to-customer

B-BBEEE: Broad-Based Black Economic Empowerment

AFI: Africa Fashion International

CAQDAS: computer-assisted qualitative data-analysis software

CFDA: Council of Fashion Designers of America

CMTs: cut, make and trims (factories)

CPUT: Cape Peninsula University of Technology

CSR: corporate social responsibility

CTFL: clothing, textiles, footwear and leather (sector)

DTI: Department of Trade and Industry

FPMs: full package manufacturers (factories)

JIT: just-in-time (concept)

MOU: memorandum of understanding

QDA: qualitative data analysis (software)

QR: quick response (concept)

RTW: ready-to-wear

SA-csi: South African Customer Satisfaction Index

SAFC: South African Fashion Council

SAFW: SA Fashion Week

SMMEs: small, medium and micro-sized enterprises

TFG: The Foschini Group

USA: United States of America

W&R: wholesale and retail (sector)

WHL: Woolworths Holdings Limited

YDE: Young Designers' Emporium (fashion label)

CHAPTER ONE: INTRODUCTION

1.1. Introduction

This research study focused on developing an effective and sustainable supply-chain-management model for South African fashion designers in the retail clothing industry. The demands exerted by fashion trends on the clothing supply chain were observed as unpredictable, with fashion retailing requiring a responsive, flexible and accurate supply-chain model to succeed in the continuously changing seasons and channels of distribution (Jackson, 2009:22). Though clothing, textiles, footwear and leather (CTFL) are grouped as one sector in South Africa, the emphasis of this research was only on clothing fashion designers in the wholesale and retail (W&R) sector, because of the lack of research found supporting this sector in South Africa. Furthermore, this research study recognised and endorsed the statement from Malem (2008:399), addressing the link between fashion designers as creatives and fashion designers as enterprises: "The implications are that designers need to quickly be able to understand the business and wider environment in which they are operating and for more published material to be widely available concerning role models and business models relevant to this unique and problematic industry."

South African fashion designers have become increasingly visible in the retail clothing industry. Unfortunately, this visibility is usually discouraged by a short retail business life cycle. Regrettably, there are no studies available that investigate and demonstrate the ratiocination of the short retail business life cycle experienced by numerous South African fashion designers in the retail environment. Given the current demand by consumers, the competition in the retail clothing industry and the support of the labour force, and because "a company is no more sustainable than its supply chain" (Krause et al., 2009), it is critical to evaluate the available clothing supply-chain-management models to develop an effective, efficient, relevant and sustainable supply-chain-management model that will safeguard the retail business life cycle of South African fashion designers. Currently, there is no documentation of a systematic supply-chain-management model for South African fashion designers and their unique environments (which are different from those of first-world countries) in the retail clothing environment. Until a systematic and documented supply-chain-management model is developed, the industry may not be able to determine the problems within the current supply-chain models of South African fashion designers in the retail environment.

The clothing supply chain is additionally said to be interlinked with an organisation's strategy and competitive advantage, and to gain competitive advantage businesses ought to evaluate new opportunities within their supply chains (Wu, 2004:1). With the foreknowledge of creating new opportunities, this research study aimed to propose an effective and economically sustainable supply-chain-management model for South African fashion designers in the retail clothing industry.

The supply-chain model for the retail clothing industry usually commences with product concept generation, product design and sourcing (Azuma et al., 2009:88), which is where fashion designers' focus and expertise are usually demonstrated. However, between designing and retail sales, there is an extensive supply-chain process which has proven to be a challenge for the South African clothing industry (Ramdass, 2011:1), including fashion designers. The challenges the South African clothing industry face on the retail front have not been explicitly researched or documented, and as a result the exact problems South African fashion designers in the retail environment encounter within the supply chain are still unknown. Hence it is imperative to develop a supply-chain-management model that assists fashion designers with efficiency and economic sustainability within the retail environment.

Bruce, Daly and Towers (2004:152) recognised that major clothing retailers have greater buying power, which negatively impacts smaller suppliers and fashion designers, since major retailers are usually given preference, by producers, over smaller suppliers due to this buying power. These differences between major retailers and fashion designers should then be separately evaluated, to meet the specific and varying needs of major clothing retailers and fashion designers. Consequently, this research study acknowledges the previous research studies on supply-chain management for major clothing retailers (e.g. Forza & Vinelli, 1997; Sen, 2008:571; Burke, 2013:20; Shukla, 2016:45; Kumar & Suganya, 2017:4-7) but also acknowledges that fashion designers require additional and in-depth documented supply-chain-management research for the retail clothing industry.

Perez (2013:1-3) enunciates that there are six supply-chain models that organisations conventionally implement, which are influenced by the industry or marketplace, the organisations' offering, the organisations' internal processes, and the managerial focus. Furthermore, the six supply-chain models are grouped into two categories: efficiency-oriented supply-chain models and responsive-oriented supply-chain models.

First, the efficiency-oriented supply chain includes the “efficient” supply-chain model, which is designed for industries with intense market competition. Second, it incorporates the “fast” supply-chain model, which is best suited for industries that produce trendy products with a short life cycle. Third, the efficiency-oriented supply chain is ‘integrated’ with the “continuous-flow” supply-chain model, which requires stability in supply and demand for scheduled production and processes.

Perez (2013:1-4) indicates that the responsive-oriented supply chain includes, first, the “agile” supply-chain model, which is for industries that produce products to unique customer specifications. Second, it incorporates the “custom-configured” supply-chain model, which considers the cost of assets to the total cost, in relation to the unique configuration of the finished product, which is the industry’s competitive advantage. And last, the responsive-oriented supply chain is associated with the “flexible” supply-chain model, which is best suited for industries required to meet unexpected demand.

Though Perez (2013:1-4) recognises six separate supply-chain models for different industries, in addition there is recognition of an increasing demand for simultaneous or multiple supply-chain capabilities for one industry. Subsequently, the supply-chain model for South African fashion designers in the retail environment requires evaluation to develop simultaneous or multiple supply-chain models which result in effectiveness and sustainability. The abovementioned situation, therefore, insinuates that there is a need for a customised supply-chain model for South African fashion designers in the retail environment, to ensure effectiveness and sustainability. There is, therefore, a gap within the current supply-chain-management models developed over the years, as these supply-chain models are not unique to South African fashion designers' requirements and needs, but are rather generalised for the retail clothing industry.

Grant (2016:275-276) defines sustainability in economic terms as “avoiding major disruption and collapse, hedging against instabilities and discontinuities”, and further emphasises that “sustainability concerns longevity”. Thus, this research study sought to research major disruptions, collapse, instabilities and discontinuities within the supply-chain-management model of South African fashion designers. As a result, economic sustainability is a critical factor for this research study, taking into account that issues surrounding sustainability can only be evaluated over an extended period and space (Costanza & Pattern, 1995:193) beyond this research study. The background and issues surrounding sustainability are discussed in the following section.

1.2. Background to the Study

The major area of concern that led to the conceptualisation of this research study is past observations of South African fashion designers' sustainability within the retail clothing industry. During past years, the retail clothing industry witnessed fashion-design brands such as Sun Goddess National shutting down four (4) of its retail outlets (Nyhaba, 2009). The fashion label Stoned Cherrie also closed its flagship store, in Rosebank (Ngubane, 2011), and this was followed by the termination of a two-year partnership with major retailer Foschini (Madikwa, 2011). In addition, Stoned Cherrie experienced a short-lived partnership with another major retailer, Woolworths, when its "diffusion line" (ready-to-wear) was discontinued (Woolworths, 2009).

While the abovementioned fashion designers experienced retail-outlet closures, other fashion designers were acquired by major retailers. One of those was Jenni Button, whose business was purchased by then major holding company Platinum Group (Pitman, 2009), which unfortunately underwent liquidation during 2015 (Moorad, 2015). Platinum Group was also the holding company of other South African designer brands such as Vertigo, Hilton Weiner and Urban Degree. Another fashion-designer brand, Marion & Lindie, was first acquired by the holding company Busby before announcing its national retail outlets' closures over social media in 2013. Lastly, Young Designers Emporium (YDE), which retails emerging and established South African fashion designers, was acquired by listed retailer Truworths (Anon, 2004), affecting fashion designers' supply-chain management and product control. Truworths had also previously acquired South African fashion brands such as Naartjie and Earthchild (Truworths, 2015). The reasons behind the take-overs and acquisitions are not publicly available, which is a cause for concern and inquiry, and which resulted in the conceptualisation of this research study.

There is no data available on an effective and sustainable supply-chain-management model for South African fashion designers in the retail clothing industry, which could assist fashion designers to retain control and develop their retail clothing businesses successfully. Most of the research available gives minimal consideration to fashion designers as managers of their own supply chains until the product reaches the retail environment. Brun and Castelli (2008:169) based their research study on developing a supply-chain model for the fashion industry on product, retail channel and brand, but not specifically for fashion designers. And while Nagurney and Yu (2012:532) concentrated on developing a supply-chain model for oligopolistic competition in the fashion industry, their study was not focused on SMMEs (including fashion designers) but on major firms. Previous studies, such as De Brito et al. (2008:534), have also established the importance of a sustainable supply chain for the fashion industry, concentrating specifically on the “sustainability movement” and how it impacts the fashion retail environment while omitting the challenges and critical factors fashion designers could potentially encounter when involved in the entire supply-chain process as managers.

The establishment of the South African Fashion Council (SAFC) was based on the recognition of the need to support the development of South African fashion designers. (Unfortunately, the SAFC has not been operational since late 2017.) In the SAFC’s business plan, Barnes (2011:9) stated that “the challenge that the industry faces in terms of moderating and promoting its design talent is strongly linked to the lack of a clear, strategic plan in terms of the objectives that need to be met for each level of human capital development.” In the case of South African fashion designers, a study outlining a specialised supply-chain model is required as an essential foundational outline for fashion designers in the retail clothing industry.

The retail clothing industry continuously encounters various changes, and in order to survive the industry, companies are also required to make rapid changes. The United States’ strongest retail clothing advantage in the past was said to be time (Burns & Bryant, 1997:345). In agreement, Zavrsnik (2007:16) stated that a retail company’s advantage exists in the ability to produce in the shortest time frame, using the Zara and H&M model as an example. Azuma et al. (2009:83) further elaborated that clothing companies have established their retail success by remodelling their supply chain to meet consumers’ expectations in a timeous manner. However, this great advantage of time needs to be researched further to evaluate what this means for South African fashion designers in the retail environment.

1.3. Statement of the Research Problem

Considering the background previously discussed, it is evident that there are obstacles experienced by South African fashion designers in the retail clothing industry. As South African fashion designers move from specialising in tailored or bespoke garments to producing larger quantities in retail, there are bound to be supply-chain-model adjustments, as consumer demand changes, competition increases and greater labour forces are required.

The problem is that a significant number of South African fashion-designer brands struggle to maintain longevity and success within the retail environment. This research study, therefore, seeks to provide a comprehensive supply-chain-management model for South African fashion designers to address the lack of literature available to better prepare fashion designers for the retail clothing industry.

The problem with the current supply-chain-management models is that they are generalised, and mostly applicable to developed countries and larger corporations with extensive buying power.

1.4. Research Purpose

The purpose of this research study was to develop a relevant supply-chain model for South African fashion designers, which counteracts challenges South African fashion designers encounter at each level of the supply chain when producing for the retail clothing industry. An effective and sustainable supply-chain-management model could prove to be more extensive or simpler, depending on South African fashion designers' needs in the retail clothing industry.

In order to develop a sustainable and effective model, each level of the supply chain will provide strategies for efficiency and sustainability in the supply chain that South African fashion designers can possibly implement for the retail clothing industry.

Ultimately, this study aimed to provide South African fashion designers with the ability to move from product conceptualisation, product design, sourcing, manufacturing and finally to the retail store effectively and efficiently, utilising a sustainable and specialised supply-chain-management model. The research questions and objectives are discussed in detail in the following section.

1.5. Research Questions

Main research question:

What is the most effective supply-chain-management model for South African fashion designers to function within the retail clothing industry?

Supporting questions:

1) What are the supply-chain-management structures of South African fashion designers in the retail clothing environment?
2) What are the existing supply-chain-management processes of South African fashion designers in the retail clothing environment?
3) Where are the supply-chain-management challenges experienced by South African fashion designers in the retail clothing environment?

1.6. Research Objectives

Main research objective:

To develop an effective supply-chain model for South African fashion designers in the retail clothing industry.

Supporting research objectives:

1) To identify the supply-chain-management structures of South African fashion designers in the retail clothing environment.
2) To identify the processes of the supply-chain-management model for South African fashion designers in the retail environment.
3) To identify the challenges South African fashion designers are experiencing in managing their supply chains for the retail clothing environment.

1.7. Significance of the study

The main aim of this study is to contribute significant research towards the supply-chain-management model of South African fashion designers, for them to achieve longevity and success within the retail environment. This research study is additionally aimed at impacting clothing retailers by providing them with essential information regarding South African fashion designers' business processes, in order for the respective retailers to use the findings to implement best business practices when working with South African fashion designers.

Stakeholders such as government institutions, fashion councils, fashion educational institutions and business consultants working with South African fashion designers in the retail environment, were included in this research study to evaluate how they assisted South African fashion designers within the supply-chain-management model for the retail clothing environment. Highlighting the various roles of these stakeholders was significant in identifying how each role could potentially contribute to the efficiency and sustainability of South African fashion designers in the retail environment.

By researching the problems and challenges South African fashion designers experienced within the supply-chain-management model, possible solutions were identified and documented for South African fashion designers, retailers, government institutions, fashion councils, fashion educational institutions and business consultants to consider when working with South African fashion designers. Most significantly, the findings of this research study illustrated a supply-chain-management model, with various requirements to meet the supply-chain-management needs of South African fashion designers in retail. Therefore, through this research study, industry gaps were identified, motivating for more specialised services from all of the stakeholders, including fashion designers and retailers.

1.8. Structure of the Dissertation

This dissertation consists of seven (7) essential chapters. Figure 1 (below) explains the flow of this final dissertation in detail.

Figure 1.1: Structure of Research Study (Obioha, 2016:10-11; Manzi, 2019:7)

1.9. Chapter Summary

This chapter provided an introduction, which included a background to the research study and offered context and empirical studies to support the topic. The background of the study was then followed by the research problem, which directed this research study's purpose to develop a relevant supply-chain-management model for South African fashion designers which counteracts challenges South African fashion designers encounter at each level of the supply chain when producing for the retail clothing industry.

Three research questions were conceptualised to support the main research question, "What is the most effective supply-chain-management model for South African fashion designers to function within the retail clothing industry?" The research questions were reinforced by three research objectives that also supported the main research objective, which was to develop an effective supply-chain model for South African fashion designers in the retail clothing industry. This chapter was underpinned by discussing the significance of the study and concluded by illustrating how that significance would be proven by outlining the structure of the dissertation.

The next chapter will introduce the retail environment South African fashion designers operate in, to provide the context of this research study.

CHAPTER TWO: CONTEXT OF SOUTH AFRICAN FASHION DESIGNERS IN RETAIL

The previous chapter provided the introduction to this research study and evaluated the background of the topic. In this chapter, the background of this research study is discussed in-depth and the context of South African fashion designers in the retail environment is provided in order to give an overview of the industry.

First, South African fashion designers as entrepreneurs will be defined; second, the availability of raw materials for South African fashion designers will be measured; third, the different types of retailers that procure from South African fashion designers will be considered; and, last, fashion market segments will be evaluated in an effort to link them with South African fashion designers' product characteristics.

2.1. South African Fashion Designers as Entrepreneurs

South African fashion designers are generally perceived as entrepreneurs. Kurz (2010:10) describes them as people who identify opportunities while creating new ventures by applying the required knowledge using specified intuitions and skills. Initially, Schumpeter, cited by Kesper (1999:138), defined the role of an entrepreneur as a "risk-taker and innovator carrying out new combinations of means of production". Fashion entrepreneurs are moreover defined as individuals who start new fashion ventures or start new fashion labels by identifying commercial opportunities, determining customer needs, and coordinating resources to design, manufacture and supply products or services (Burke, 2013:12).

Granger and Sterling (2012:2) comprehensively define fashion entrepreneurs as individuals who *recognise an opportunity. They size up its value as well as resources necessary to make that opportunity a success. They are visionaries. They have a vision of how the business will grow, and they have the drive to make it happen. Fashion entrepreneurs are always looking for better and innovative ways to find new markets, to add to an existing product line, and to tap into larger geographic territories. They are futuristic in that they anticipate and embrace change. They see different ways of doing things.*

This implies that fashion entrepreneurs ought to adapt quickly to the business disciplines and the wider environment in which they are operating (Malem, 2008:399). Ultimately, fashion entrepreneurs require the ability to identify opportunities, and exploit those opportunities to convert them into a profitable reality, by spotting required changes in the marketplace by making proactive decisions and by spotting new opportunities (Burke, 2013:30).

It should be noted that for fashion designers' businesses to survive in the wholesale and retail industry, selling functions are required to balance and ensure regular income (Malem, 2008:407). Fashion retail in South Africa has been a significant contributor to retail income over several years (Statistics South Africa, 2018:4-5), and it is therefore expected that suppliers such as fashion designers contribute to this income for the growth of the economy (Strydom et al., 2015:112).

2.2. Raw Materials and Manufacturing for South African Fashion Designers Supplying Retail

South Africa's clothing-manufacturing industry is certainly not without its risks and challenges (Fin24, 2018). The historically well-established manufacturing industry in South Africa previously supplied a variety of products, from basic and low-cost products to high-fashion and bespoke products (Kesper, 1999:143). As a result, the South African fashion clothing industry consists of a few large factories, which are referred to as full-package manufacturers (FPMs), but it is important to note that most apparel producers or manufacturers for fashion designers are spread across medium-sized, micro-factories and survivalist operations referred to as "cut, make and trims" (CMTs) (Tilly et al., 2013:3).

A significant portion of fabrics and yarns used in South Africa are now imported, as domestic fabrics and yarns are perceived as more expensive than the imported equivalents even after duties have been applied (Roberts & Thoburn, 2004:128). The Textile Federation (2007) acknowledged that the South African textile industry has encountered challenging trading conditions, with decreasing employment due to the shutdown of textile mills in the early 2000s, forcing the retrenchment of staff, as there was an influx of imports, with a 29% increase in imports between the years 2001 and 2006, from 77 000 to 99 000 tons, and an additional 500% increase for synthetic fabrics.

Business Partners (2014) optimistically noted that, though the South African textile and clothing industries are small, the aim is to utilise all the natural, human and technological resources available nationally to ensure that these resources become sought-after internationally. In addition, the Department of Trade and Industry (DTI) reported that there are plans under way to unveil new strategies to protect the local textile industry (Hans, 2019). Tobler-Rohr (2011:46) affirms that technology and quality are acceptable parameters to support the flow of material within the textile supply chain, as functions such as spinning, weaving/knitting and finishing typically take place at a single facility, with the finishing process undertaken by a subcontractor.

Since the closures of manufacturing mills in the late 1990s, it has become increasingly difficult to locate reliable manufacturing facilities in South Africa willing to produce the minimum units South African fashion designers often require (Entrepreneur Magazine, 2018:6). And South African clothing-manufacturing challenges and its risk profile are extended by the 22% tax imposed on importing the raw materials essentials for manufacturing. In addition, foreign investment has often bypassed the South African clothing-manufacturing industry, to invest in neighbouring countries such as Lesotho, Swaziland, Madagascar and Mauritius (Fin24, 2018).

In past years Lesotho and Swaziland were both at the forefront of the apparel-manufacturing industry, with forty-nine clothing and textile factories, in Lesotho employing over 53 000 people. Eight of those factories were denim factories employing over 15 000 people, while in Swaziland there were twenty-five clothing and textile factories employing 30 000 people (Traub-Merz & Jauch, 2006:19). In more recent years, Bennet (2017:4&8) reported that there were now nine denim-jeans manufacturers employing over 13 000 people making over 23 million pairs of denim jeans per year in Lesotho, and manufacturing denim fabric at vertically integrated spin-yarn dye-weave textile mills. However, the textiles, apparel and footwear manufacturing industry remained Lesotho's largest employer for the formal private sector, employing about 46 000 people in total.

Globalisation has exemplified its opportunities and threats through the textile industry, as the sub-Saharan-African textile industry contributes to a significant percentage of employment in the manufacturing sector, so necessary adjustments in the local industry would have a significant effect on income and employment locally (Roberts & Thoburn, 2004:126).

2.3. Clothing Retailers Working with South African Fashion Designers

South African fashion designers have been operating within the retail environment for over fifteen years. For at least twelve years ago there were already media reports indicating that retailers were providing opportunities and retail space to established and recognised local designers (Palmi, 2007:29). This meant, however, that there were limited retail opportunities for start-up fashion designers, and as a result, fashion designers who were just starting their businesses were encountering difficulties in gaining market penetration and market share within the retail environment.

According to Lee (2010:596), retailers are classified based on their retail mix, which involves the type of merchandise sold, the price of the merchandise, the merchandise assortment and the level of customer service. There are several classifications of brick-and-mortar fashion retailers, such as speciality stores with restricted product classifications, department stores that group their products according to similarities and brand names, fashion-manufacturer outlets or independent retailers for independent fashion designers and manufacturers, boutiques that are emporiums that offer an assortment of premium fashion at smaller quantities for exclusivity, and designer stores that are operated and run by fashion designers (Diamond et al., 2015). The retailers' taxonomy also classifies the retailers' capacity, as department stores are categorised as large-scale retailers with a wide and in-depth variety of merchandise, while speciality stores carry a narrow but deep range of specific categories and tailored assortments, whereas boutique stores are smaller in size, with top-of-the-line ranges that concentrate on niche, narrow and specific merchandise (Lee, 2010:597-598).

Department stores are usually located in large regional malls with a typical size of 930-1 860 square metres. They are known to carry a wide and in-depth assortment of merchandise that ranges between high and average quality, pricing and customer service to cater to their large-scale retail units (Lee, 2010:596). The latest South African Customer Satisfaction Index (SA-csi) ranked Pep Stores, Truworths, Ackermans, Woolworths, Jet, Mr. Price and Edgars as the clothing retailers with the highest customer satisfaction (Writer, 2019). Though Mr. Price and Pep Stores were ranked amongst the top South African department stores, the researcher observed that Mr. Price would traditionally be categorised as a speciality retailer while Pep Stores would be categorised as a discount retailer, as it focused on selling merchandise at discounted prices (Bhasin, 2020).

Truworths, Ackermans, Woolworths, Jet, and Edgars have been observed as the top South African fashion department stores that work with independent South African fashion designers, while Mr. Price was the speciality retailer that was known to work with various artists including South African fashion designers. In December 2003 Truworths International acquired a controlling stake in YDE (Anon, 2004), an outfit which identified, supported and promoted the "future fashion clothing talent of South Africa" with designer brands that exclusively supplied YDE, had a registered business and/or trademarks and produced clothing manufactured in South Africa only (YDE, 2019).

Edcon, which is the holding company to Edgars and Jet, introduced the Edcon Design Innovation Challenge, partnered with SA Fashion Week (SAFW) (Edcon, 2018). Edcon had previously worked with local fashion designers to ensure that the best of South African fashion design was readily available across the country (SA Fashion Handbook, 2014). Edcon launched its "designer capsule collection" in Melrose Arch in 2011, followed by Sandton City in 2013, then Rosebank Mall and finally Menlyn Shopping Centre in 2014 (SAFW, 2018). Edcon later introduced an additional phase to the Edcon Design Innovation Challenge, "21 Steps to Retail", to advance skills development and entrepreneurship in the fashion and design sectors (Edcon, 2018).

Moreover, Edcon took on the sponsorship role for the popular international reality show, *Project Runway South Africa*, in which the winner was awarded a mentorship opportunity and prizes worth over R400 000 (Channel24, 2018). Edgars subsequently worked with a large number of high-end local labels, such as David Tlale, Black Coffee, Clive Rundle, Colleen Eitzen, Cutterier by Laz Yane, Gert-Johan Coetzee, Mantso, Rubicon, Sies!Isabelle, ERRE, Fundudzi by Craig Jacobs, Ilan and Sober (SAFW, 2018).

Woolworths is said to have been at the forefront of local design since 2003, by supporting and positioning South African fashion designers in the market (WHL, 2018). In 2017 Woolworths launched its "StyleBySA" capsule collection at SAFW, which were collections designed by eight South African fashion designers: Rich Mnisi, Thebe Magugu, AKJP, Sol Sol, Selfi, Young and Lazy, Pichulik (an accessories designer) and Maria McCloy (an accessories and shoe designer) (BizCommunity, 2017). In 2018 the collaboration with local fashion designers included Thebe Magugu, Mmuso Maxwell, Wanda Lephoto and Watermelon Social Club (WHL, 2018). With the continued support of the South African design industry, Woolworths claimed:

> *Equal to our obsession with quality is our passion for design. We believe that design can make a real difference by contributing to our country's economy and helping solve critical challenges facing South Africa today. That's why, in addition to our longstanding sponsorship of Design Indaba, we're committed to enriching design education, mentoring young designers and supporting local talent.* (Design Indaba, 2019).

As previously insinuated, Mr. Price took a slightly different approach, partnering with various designers and artists from a number of creative industries. The disciplines of the designers and artists include illustrators, fashion designers, graphic designers and visual artists (Mr. Price, 2019). In 2013 Mr. Price partnered with the Johannesburg-based fashion brand Loin Cloth & Ashes (*Drum*, 2013), and in 2014 Mr. Price joined forces with Africa Fashion International (AFI) and *Elle* magazine in a search for the next top South African fashion designers (McArthur, 2014). Most recently Mr. Price (2019) announced its "MrP + Creative Collabs" with emerging young local fashion designers, where collections by emerging fashion designers are retailed at lower price-points than the usual local fashion-designer brands. The ranges are launched as a series of collections from different fashion designers throughout the country (WomenStuff, 2019).

The Foshini Group (TFG) in the past ran the Foschini Annual Design Awards, a competition aimed at fashion-design students registered at recognised South African tertiary institutions. This was an opportunity for TFG to scout for local fashion-design talent (Hattingh, 2008). Though TFG has not worked with independent local fashion designers in more recent years, the company invested in the local manufacturing sector by investing in clothing factories in Caledon and Maitland, both in the Western Cape (TFG, 2019).

Most recently, Ackermans, owned by the Pepkor Group (which also owns Pep Stores), initiated a programme promoting fashion design as a career by working with aspiring South African fashion designers through their *Style Squad* television series, where pupils from nine to fifteen years of age designed ranges, and the winners would receive prizes including money, education policies and the opportunity to sell their designer ranges in selected Ackermans stores across South Africa (Ackermans, 2019).

Luminance is one of the most popular high-end department stores, which is a stockist to international luxury fashion brands such as Oscar de la Renta, Balenciaga, Givenchy, Manolo Blahnik, Diptyque, Alexander McQueen and Diane von Furstenberg. Luminance is also a stockist to national luxury fashion brands such as MaXhosa by Laduma, Thula Sindi, David Tlale and ERRE, to name a few (Business Essentials, 2017).

Big Blue is a proudly South African retailer, classified as a fashion-manufacturer outlet or independent national chain store with 22 stores nationwide, working with South African fashion designers, artists, crafters and printmakers (Blue, 2019). Big Blue is known for using locally milled and manufactured fabric, and also known for its Pan-African T-shirts (Le Roux, 2016). Through working with local businesses, Big Blue aims to maintain local jobs for South Africans by providing ongoing skills development and market access through its retail stores and online e-tail to independent entrepreneurs who would otherwise not have access to that avenue of retail (Big Blue, 2019).

The Space in an independent national retailer, which was established as one standalone store in 2000 in Durban, KwaZulu-Natal, and multiplied into eleven stores nationwide, and added an online retail store. Now The Space is a stockist to over 25 fashion designers (The Space, 2018).

Other retailers that work with South African fashion designers include AKJP, Bo-op Collective, Mememe, Mungo & Jemima, Merchants on Long, Me & You, HSE Lifestyle Emporium, Stitch & Steel, and Convoy, which are concept stores or boutiques that offer high-quality South African brands (Kawana, 2017; Thompson, 2018; Classen, 2017). Over and above that, other South African fashion designers have opened their own designer stores across the country, for example, Thula Sindi, Magents and Black Coffee (Black Coffee, 2018; Magents, 2019; Thula Sindi, 2014).

Besides the brick-and-mortar retailers, there are non-store retailers, with a retail mix on platforms such as catalogues, electronic retail (e-tail) otherwise known as online stores, and television home-shopping retailers (Lee, 2010:597). South African fashion designers have been noticeable on their own e-tailing platforms or online stores, and South African fashion designers are found on larger clothing e-tail platforms such as Superbalist and Zando.

Superbalist was founded in 2010. In 2017 it merged with another e-tailer, Spree, and currently is a stockist to some well-known designers such as David Tlale, Amanda Liard Cherry and Leigh Schubert, among other fashion-designer brands (Superbalist.com, 2019). Zando, which was founded in 2012, is a stockist to popular South African brands such as Magents, BeachCult, ERRE Fashion, Isabel de Villiers Clothing, Jota-Kena and Non-European, to name a few (Zando, 2019).

2.4. South African Fashion Designers Product Characterisation in Retail

Malem (2008:403) enunciates that “fashion is creativity, but it also means being very aware of the industrial and commercial aspects”. The fashion market sectors for clothing and apparel include menswear and womenswear. Womenswear styles are categorised as evening wear, formal work and office wear, weddings and occasions, contemporary fashion, casual wear (also referred to as leisurewear), denim, streetwear, resort or cruise wear, sportswear, slouch or loungewear, and lingerie. Menswear styles are categorised as bespoke tailoring, formal work and office wear, wedding and occasion, contemporary fashion, casual wear, denim, streetwear and sportswear (Posner, 2015:10).

The fashion industry globally is considered to have a short life cycle, irregular demand and a large variety of products, which consists of fashion products, seasonal products and basic products, with inspiration taken from African techniques and cultures, just as African designers have been influenced by global trends, materials and techniques (Sen 2008:571;573). Studies have also indicated that luxury brands are the most highly considered brands by consumers throughout the world, with couture, ready-to-wear (RTW) and accessories classified as the most popular product offerings (Fionda & Moore, 2009:348). In 1997 Corporate Intelligence on Retailing (cited by Fernie et al, 1998:366) recognised contemporary studies reflecting that fashion design houses and couturiers were the most auspicious of global fashion-clothing retailers. The distinct image of fashion brands is important, as it offers a point of differentiation and builds economies of scale. On the downside, the styling of designs is easily imitated, and that can take away from a fashion brand’s distinct image (Richardson, 1996, cited by Malem, 2008:400).

One of the ways in which fashion designers differentiate themselves and consumers individualise themselves is through streetwear (Rajendran, 2012:1). Chang et al. (2017:92) point out that streetwear fashion distinguishes one city from another, with everyday dress codes noticed on people walking the streets of those cities. This came about in the post-war period, when the increase of sportswear became more refined and specialised, thus commercialising and democratising fashion into everyday streetwear and high-street fashion (Craik, 2005:161). Other sources state that streetwear was born in the 1980s in New York, when the youth of the inner cities felt frustrated and alienated, so a community was formed worldwide that was largely influenced by skateboarding, punk, reggae, hip-hop, emerging club culture, graffiti, travel and the art scenes (Vogel, 2006:7, cited by Kawamura, 2018: 2).

Some individuals believe that streetwear was derived from sportswear, while sportswear evolved from generic outdoor, work and leisure uniforms worn for sports and activities, into highly specialised fashion worn purely for comfort and aesthetic reasons by individuals not participating in any sporting activities (Barton, 2015:1). Warner (2010:648) elucidates that sportswear is no longer loosely based on clothing developed for the participation in sports, but has rather come to define a broad category of fashion-oriented comfortable clothing, while the term "active sportswear" had become associated with sports and exercise activities. Lantz (2018:1) refers to casualwear, sportswear and jeanswear as the "relaxed universe".

Opposite to streetwear, sportswear and casualwear (otherwise known as leisurewear) is tailoring, which is the craft of designing, cutting, fitting and finishing clothing (David, 2010:674). Furthermore, "bespoke" in tailoring terms means a garment created to dress a specific person by ensuring that the patterns are cut to reflect the customer's measurements, and the customer will additionally have a choice in the fabric, colour and style of the garment designed (Cumming et al., 2010:1). Cramer (2011:1) clarifies that in the early twentieth century bespoke tailoring and dressmaking services gave way to standardised mass manufacturers, but then the early twenty-first century witnessed the return of personalised designs.

Due to the exclusivity and the high prices, bespoke clothing is generally perceived as a reflection of high status in society, but RTW emulated what was perceived as upper-class clothing throughout society (Howell, 2012:1). Products such as perfumes, accessories and RTW diffusion lines bridged the gap between expensive high-fashion garments and affordable mass-market goods (Pavitt, 2010:98). RTW, a fashion option of designer garments produced with standard sizes and sold in retail stores or catalogues, was initially developed during the nineteenth century, a period when bespoke tailored clothing was the norm (Buckland, 2010:123).

RTW designers are located in numerous locations around the world. Hence the coordination and logistic processes of production are emphasised, as the production of RTW garments is labour intensive, but the initiation of production requires less capital and technology than other businesses. This is why the business of RTW clothing has been deemed of high importance to the economies of developing nations in the twentieth and early twenty-first centuries, and to entrepreneurs of these eras. (Druesedow, 2010:591)

“Afropolitan” is one of the adjectives used to describe some of the South African fashion designers based in Johannesburg, as these designers are said to integrate African and cosmopolitan aesthetics (Farber, 2010:129). While previously Kesper (1999:143) noted that the South African clothing industry is very diverse, with outfitting from basic garments to high-fashion bespoke garments, more recently Strydom et al. (2015:111-112) characterised the fashion industry in South Africa as highly competitive, particularly in the high-fashion retail sector, which is mainly influenced by fashion designers, creative industries and global trends. Farber (2010:131) further exemplifies South African fashion designers such as Sun Goddess, Stoned Cherrie and Strange Love as meticulous designers with unpredictable designs, which represent a balance of diversity for South African cultures.

The study of Choi (2003, cited by Malem, 2008:402) deduced that in Australia there are two types of designs, “artisan designs” and designs focused purely on business. South African fashion designers require a similar distinct characterisation of their product types, in order to develop a more suitable supply-chain strategy and manufacturing strategy for the retail clothing industry.

2.5. Chapter Summary

This chapter first defined the South African fashion designer as a fashion entrepreneur, by studying various literature that provided wide-ranging descriptions of fashion entrepreneurs in order to better understand South African fashion designers. The literature also examined the availability of raw materials, together with the manufacturing environment for South African fashion designers in the retail environment, to provide additional settings for this research study.

Several news and online publications were consulted to attest to the retail landscape within which South African fashion designers operate. The theories associated with the fashion market segments and product characterisation were highlighted to bring to the forefront probable product types South African fashion designers manufactured and produced.

Additional literature associated with supply-chain management, efficiency and sustainability in the retail clothing industry is discussed in the next chapter.

CHAPTER THREE: THEORETICAL FRAMEWORK AND LITERATURE REVIEW

The previous chapter provided an overview of the retail clothing environment within which South African fashion designers operated. In this chapter, various research resources have been reviewed to highlight a theoretical framework and establish the literature gap.

The analysis of previous research studies was carried out to create a strong theoretical understanding in order to develop an effective and sustainable supply-chain model for South African fashion designers in the retail clothing industry. First the theoretical framework is introduced, then the literature review is explored.

3.1. Theoretical Framework

A theoretical framework is defined as a formulated theory that explains, predicts, studies, challenges and extends existing theories within the parameters of critical bounding assumptions (Abend, 2008:173). Additionally, Anfara (2012:1) defines a theoretical framework "as any empirical or quasi-empirical theory of social and/or psychological processes, at a variety of levels".

The theoretical framework is the structure that holds or supports the theory of a research study. The theoretical framework introduces and describes the theory that explains why the research problem under study exists. Thus, this theoretical framework will explain the chosen theory that underpins the thinking, understanding and planning of this research study, together with the concepts and definitions from the theory that are relevant to this research topic (Grant & Osanloo, 2014:12).

This research study made use of the functionalist theory also referred to as functionalism. The functionalist theory is based largely on the biology, physiology, psychology and sociology studies of Herbert Spencer, Emile Durkheim, Talcott Parsons, Robert Merton and John Dewey during the nineteenth century (Mooney et al., 2007:1). Vogt (2011:128), in agreement, explains that the functionalist theory is an idea borrowed from the study of anatomy: within the functionalist theory there is a general assumption that anatomical structures exist for functional reasons, and as a result, the perspective of "structural" functionalism emerged, which is the study and evaluation of the usefulness of social structures that maintain societal order. In this regard, this research study evaluated the supply-chain-management model as the “social structure” that maintained the “societal order” of South African fashion designers in the retail environment.

The functionalist theory defines each part of society in terms of how it contributes to the stability of society, signifying that each part of society serves a purpose for the stability of the whole (Crossman, 2019). The functionalist theory focuses on the whole unit of society as being composed of interconnected parts that influence the entire society (Dadabhoy & Muth, 2006).

Functionalist theorist Durkheim (1956:46) was certain that for society to continue, it required both an adequate differentiation of roles that provided the stakeholders with the directive and adequate solidarity to operate efficiently together and continue as members of that particular society. Equally, this research study defined each part of the supply-chain-management model in terms of how it contributed to the efficiency, sustainability and stability of fashion designers in the retail environment, signifying that each integral part of the supply-chain-management model served a specific purpose for the stability of the whole. Each role within the supply-chain-management model for fashion designers in the retail environment was differentiated as an interconnected part that influenced the sustainability and efficiency of South African fashion designers in the retail environment.

During the twentieth century different theories of functionalism emerged, where small-business systems were included in the functionalist theory. Named microfunctionalist theory, this was the study of small businesses (Alderson, 1965, cited by Svensson, 2002:739). As alluded to in the preceding chapter, there are limited supply-chain-management models focusing on SMMEs such as South African fashion designers in the retail environment. This research study, therefore, evaluated how the interconnected parts of the clothing supply-chain-management models best served the needs for the sustainability and efficiency of SMMEs such as South African fashion designers in the retail environment.

Additionally, Merton (1968, cited by Mooney et al., 2007:1) identified two types of functions, the manifest function and the latent function. The manifest function results in intended consequences that are commonly recognised, while the latent function results in unintended outcomes. The current clothing supply-chain-management models documented and researched are largely targeted at large clothing-fashion retailers, which could potentially result in a number of latent functions for South African fashion designers in the retail environment. As a result, this research study aimed to develop a supply-chain-management model targeting the unique needs of South African fashion designers to achieve more manifest functions within the retail environment.

Two perspectives were developed within the functionalist theory. The conflict perspective, which "explains various aspects of our social world by looking at which groups have power and benefit from a particular social agreement", and the symbolic-interactionist perspective, which evaluated how "broad aspects of society, such as institutions and large social groups, influence the social world" (Mooney et al., 2007:1). The conflict perspective was applied, as the various aspects of the supply-chain-management model were looked at to determine which stakeholders had power and benefited from successful South African fashion designers in the retail environment. Groups and stakeholders such as governmental institutions, fashion councils, fashion education institutions and business consultants were looked at to determine how they contributed to the efficiency and sustainability of South African fashion designers in the retail environment and how they foresaw benefiting from that "social agreement". The symbolic-interactionist perspective was applied through evaluating the broad aspects of the clothing supply-chain-management model to evaluate aspects that mostly influenced the sustainability and efficiency of the model for South African fashion designers in the retail environment.

Figure 2 (below) illustrates how the functionalist theory was applied throughout this research study. This graph was designed by connecting the abovementioned research.

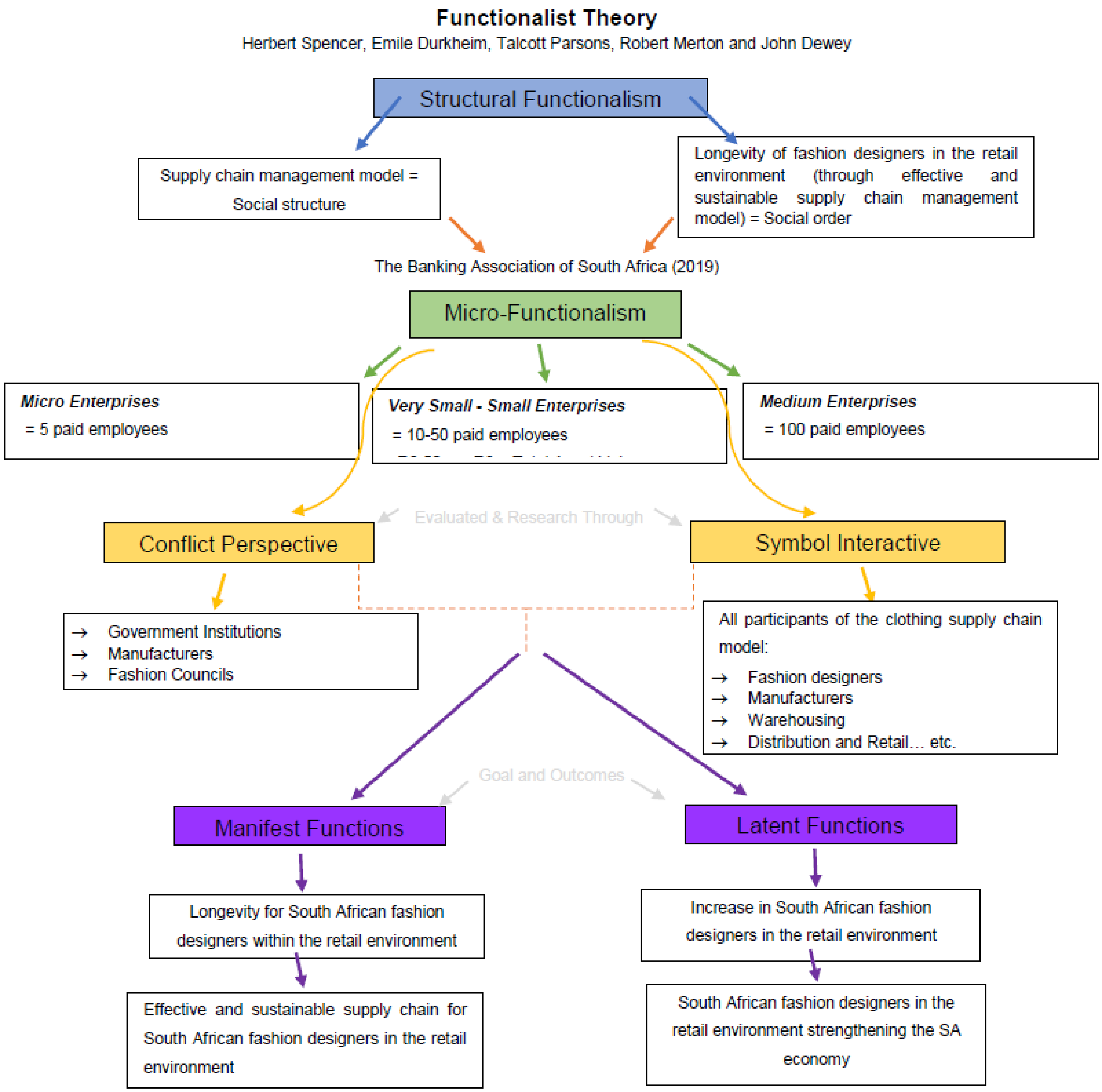


Figure 3.1: Theoretical Framework – Functionalist Theory

3.2. Literature Review

As mentioned in the introduction to this chapter, the literature review explored various research resources to identify the literature gap and establish a strong theoretical understanding of the topic while studying previous research carried out.

First, in this section, the definitions associated with the concepts of the supply-chain and supply-chain-management discourse was assessed, linking that to research surrounding sustainable supply-chain-management and efficiency. Second, different supply-chain strategies were analysed. Third, the different functions of the different members within the clothing supply-chain-management model in the retail environment were deliberated on. And lastly, the supply-chain-management integration of the various members within the model were discussed. This chapter concludes with the identification of the research gap, together with the issues unfolding around the topic highlighted.

3.2.1. Definitions of supply chain and supply chain management

The topic of supply-chain management was extensively covered by various researchers in a number of fields, including clothing and fashion, while there are various definitions elucidating supply chain. La Londe and Masters (1994, cited by Mentzer et al., 2001:3) defined the supply chain as the numerous firms that move material forward, while Azuma et al. (2009:88) explained the supply chain as the external and internal coordination of activities by organisations to "translate the shared intelligence of customers' needs and expectations into a proactive response to the market fluctuation and the future demands", and Shukla (2016:44) interpreted the supply chain as a range of organisations performing specialised activities to execute an end goal; Shukla furthermore stated that the performance of one organisation is highly reliant on the other supply-chain functions. Finally, Masteika and Čepinskis (2015:831) evaluated numerous definitions and concluded that a supply chain is several organisations working in a system of production, from raw material to the consumer, which consisted of the supply of material, assembly of products, storage, monitoring of products, tracking orders, distribution and delivery.

It is important to note that during this research study, the term "supply chain" was used interchangeably with the term "value chain", which was derived from Michael Porter's seminal work echoing that profitability is important at the various points of the chain, as a greater value will result in higher profits and return on investment (Ayers & Odegaard, 2017:12-13). The value chain is therefore defined as the combination of value-added activities that work together to provide customers with value (Porter, 1985, cited in Feller et al., 2006:1).

Diversely, supply-chain management refers to a more intricate process that addresses the successful and accurate management of several relationships across the supply chain while dealing with total business processes (Lambert et al., 1998:1). Supply-chain management also refers to coordinating and integrating supply-chain activities into a sustained process (Masteika & Čepinskis, 2015:831). Comprehensively, supply-chain management is a set of activities used to coordinate and incorporate the information, resources and flow of finances efficiently through the supply chain, for the final product to be produced, distributed and delivered at the right time with the correct quantities at the desired location, at the best cost to ultimately achieve customer satisfaction (Gibson et al., 2005:22). As the basic and extended product design, maintenance and operation of supply-chain processes are meant to satisfying the consumer's needs, these factors contribute significantly to the definition of supply-chain management (Ayers & Odegaard, 2017:12).

As evaluated in the latter definition, there are aspects of supply-chain management linked to efficient performance (Beske & Seuring, 2014:322). Additionally, sustainability and in particular sustainable development expresses the ability to meet current needs without compromising future needs (World Commission of Environment and Development, 1987, cited by Seuring & Müller, 2008:1700). The foundation of sustainability encompasses of temporality, particularly longevity (Costanza & Pattern, 1995:193). It is therefore essential for South African fashion designers to manage the supply chain in a manner that guarantees business longevity within the retail clothing industry. The management of material, information and capital flow, together with the collaboration between organisations along the supply chain while tracking sustainable development, is the essence of sustainable supply-chain management (Seuring & Müller, 2008:170).

Fernie and Sparks (2009:5,11) identified that the key factors in management are to ensure that product availability is easy, maximises the efficiency of the supply chain and ensures that retailers closely collaborate with suppliers to warrant effective coordination of activities. Demonstrating this theory, the internationally acclaimed fashion designer Anne Fontaine implemented set policies that allow for flexibility and tight control over the supply chain, ensuring that the retail environment supports the design function and the manufacturing function in the process of producing high-quality and exciting product ranges (Christopher & Peck, 2004:1).

Notably, management skills are required to create a well-designed supply chain for strategic advantage and to create new business models that are essential in shifting the current competition to achieve effective supply-chain management (Ayers & Odegaard, 2017:12). Consequently, this research study will evaluate supply-chain-management strategies to deduce the best approach for South African fashion designers within the retail environment.

3.2.2. Lean and Agile Supply Chain

To develop a supply-chain-management model that is effective and sustainable for South African fashion designers in the retail clothing industry, different supply-chain strategies require consideration. Christopher et al. (2006:286) observed that one supply-chain strategy will not apply to all product types and industries, hence each industry requires a modified supply-chain strategy suitable for a specific product family, product market and product demand.

When considering the lean strategy for a supply chain, eliminating waste was the primary focus, in order to manufacture more products with fewer resources (Christopher, 2000:37). Allegedly, waste elimination is associated with the improvement of business performances and the reduction of inventory (Stratton & Warburton, 2003:184). When demand is stable, predictable and with low variety, numerous scholars agreed, the lean strategy was most suitable (Christopher, 2000; Bruce et al., 2004; Agarwal et al., 2006; Christopher et al., 2006). Groover (2008, cited by Chiromo et al., 2015:1968) illustrated that the practice of eliminating waste required the elimination of the production of defective parts, overproduction, excessive inventories, unnecessary processing steps, unnecessary movement of people, unnecessary transport and handling of material, and workers waiting.

Additionally, the lean strategy is closely associated with a long product life cycle and low cost in goods manufacturing, and highly associated with the just-in-time (JIT) concept (Stratton & Warburton, 2003:184). JIT is defined as the delivery of finished products to be sold on time to satisfy customer’s demands (Bruce et al., 2004:156). Comprehensively, JIT is a concept associated with continuous and compulsory problem solving, ensuring that the customer’s demands are satisfied accordingly, timeously, without waste and with ongoing improvements (Smadi, 2012, cited by Chiromo et al., 2015:1968). JIT concurrently improves customer service and efficiency throughout the supply chain by enabling flow (Stratton & Warburton, 2003:184). The JIT concept therefore safeguards all lean-strategy functions such as the pull system of production, reduction in set-up time for minimum quantities, production levelling, on-time deliveries, zero defects and flexible workers (Groover, 2008, cited by Chiromo et al., 2015:1968).

Contrarily, when demand is high, with a variety of products and a volatile market, the agile strategy will be most suitable (Agarwal et al., 2006:212).

Subsequently, agility is defined as an organisation's capacity to be flexible, and promptly respond to changes in variety and volume demands (Christopher, 2000:38). The scope of the agile strategy involves enriching the customer, collaborating to improve competitiveness, organising to master change plus uncertainty, and finally leveraging the impact of people plus information (Goldman et al., 1991, cited by Bergvall-Forsberg & Towers, 2007:379).

Masson et al. (2007:240) outlined that the framework of the agile strategy required;

- firstly, a level of market sensitivity that captured emerging trends, with the ability to listen to customers and the means to monitor real demand,
- secondly, intentional management of the supplier network by orchestrating the complex networks as a whole to function productively, while focusing on the core competencies of the individuals within the network and leveraging partners' capabilities,
- thirdly, process integration that oversaw collaborative efforts of product design, co-management of inventory and the synchronisation across the supply chain,
- lastly, Mandatory virtual supply network to support the management of the network by safeguarding the collaborative planning, sharing of information and visibility across the supply-chain model.

The agile supply chain is concurrently associated with quick response (QR) (Stratton & Warburton, 2003:184). Expansively, McMichael, Mackay and Altman (2000:613) defined QR as "a consumer-driven strategy of corporative planning by supply chain partners… using IT and flexible manufacturing to eliminate inefficiencies from the entire supply chain". In essence, QR is a set of innovative processes designed to reduce the manufacturing cycle time frame, initial production commitments and inventory levels (Richardson, 1996:401). To achieve this, raw material suppliers, manufacturers and retailers ought to create long-term relationships to reduce the manufacturing time frame and distribution processes (Birtwistle et al., 2003:118). QR further facilitates shortened lead times while maintaining low costs (Bhardwaj & Fairhurst, 2010:165).

For a resilient supply-chain-management model, agility is essential, as that would afford entities the ability to respond efficiently to unpredictable situations, which is an advantage for uncertain industries (Christopher & Peck, 2004:13). Christopher, Lowson and Peck (2009:117) further expounded that a successful fashion market is characterised by the market's agility, to move swiftly along the supply chain. Towers and Ashford (2003, cited by Towers & Bergvall-Forsberg, 2009) recommended that to achieve all measurements for agility, lean and agile strategies should be combined to construct a long-term (sustainable) effective and efficient supply-chain strategy which is referred to as a hybrid strategy or a "leagile" strategy.

The "leagile" strategy would ideally be implemented with partial market mediation, which refers to the ability for organisations to adjust to changes as a result of moderate visible customer demand. Such an approach should be applied when a mix of designer and standard merchandise is being produced, so the organisation would utilise different supply bases for the final product (Towers & Bergvall-Forsberg, 2009).

Ultimately, the type of product, type of demand and lead time for replenishment required consideration when selecting a suitable supply-chain strategy or model (Christopher et al., 2006:283).

3.2.3. The Functions of Primary Members within the Retail Fashion Supply-Chain Model

Supply-chain members are all the firms the principal entity (South African fashion designers) directly or indirectly interacts with, from the point of product origin to the point of product consumption (Lambert et al., 1998:5). Weber (1982, cited by Masteika & Čepinskis, 2015:831) believed that the main purpose of a supply chain is to satisfy the needs of the customer through the "perfect" supply chain. For this "perfect" supply chain, the supply-chain-management model requires the inclusion, coordination and collaboration of partners, stakeholders, suppliers, intermediaries, service providers and clients to plan and control supply-chain-management activities (Masteika & Čepinskis, 2015:831).

However, for a more manageable network, the primary and supporting members need to be distinguished (Lambert et al., 1998:5). The distinguishing factor begins at each level or member of the supply chain, which is referred to as an “echelon”, and the bypassing of an echelon function is referred to as “disintermediation”, which is a function able to lower cost, inventory and lead times (Ayers & Odegaard, 2017:6). Lambert et al. (1998:5) further clarified that the primary members of the supply chain are the autonomous entities or strategic businesses that are involved in the operational and managerial processes within the supply chain to produce a specified output for the consumer; supporting members are entities that simply provide resources, knowledge, utilities and/or assessments, which were included during this research study’s data-collection process. This research study referred to the primary members of the supply chain as “stakeholders”, which are seminally defined as individuals, groups or organisations with a claim or actual ownership, right or interests in the past, present and future of a firm and its activities (Clarkson, 1995:106).

It should be noted that supply-chain models differed as a result of business structures, product variations and consumer preferences (Ayers & Odegaard, 2017:6). Forza and Vinelli (1997, cited by Birtwistle et al., 2003:118-119) initially proposed that the primary member of the clothing supply-chain model would be the raw-material producers, followed by the yarn manufacturers, then the fabric manufacturers; next, the garment manufacturers would take over the reins, then the distributors would precede the retailers before the product reached the customers.

Sen (2008:571) later shortened the fashion supply-chain model and suggested that it is initiated by fibre producers manufacturing fibres; second, the raw fibres were spun, woven or knitted into fabric; third, the clothing manufacturers produced the product design; and, fourth, the final link to the supply chain comprised of retailers who would sell finished products to consumers.

Burke (2013:20) outlined that the supply-chain model for the fashion and textile industry started with the acquisition of textiles, followed by fashion trend forecasting, after which the fashion-design process was steered by fashion designers, then manufacturing and distribution took place, then fashion sales and marketing would be rolled out, and, lastly, the product would be made available at retail outlets for customers to purchase.

More recently, Shukla (2016:45) established that the primary supply-chain process began with suppliers, followed by manufacturing, and then warehousing (this initial process was classified as product planning and inventory control); then transportation would be required to transport goods to the distribution centre/s (this secondary process was classified as the distribution and logistics process); and from the distribution centre the product would continue to wholesalers and finally to retail.

Kumar and Suganya (2017:4-7) postulated that the supply chain started with the planting of raw material, followed by the yarning and spinning process, then fabric production, which made way for the clothing-manufacturing process, and finally the supply chain was concluded with the retail phase.

Ayers and Odegaard (2017:8) underscored that the retail supply chain was technically initiated by the sourcing of raw materials to ensure the manufacturing of products, but the common and harmful practice of labelling only the sourcing and purchasing functions as the supply chain should be avoided, and rather the supply chain should be evaluated as end-to-end functional steps that flow from raw material to retail.

The table below illustrates how the abovementioned supply-chain models vary, but it should be noted that these supply-chain variations are not the only ones suggested in the literature.

Table 1: Supply Chain Model Variations (Forza & Vinelli, 1997; Sen, 2008:571; Burke 2013:20; Shukla, 2016:25; Kumar & Suganya, 2017:4-7)

Forza and Vinelli (1997)	Sen (2008:571)	Burke (2013:20)	Shukla (2016:45)	Kumar and Suganya (2017:4-7)
Raw Material Producers	Fibre Production and Manufacturing			Planting of raw material
Yarn Manufacturers	Spinning, Weaving or Knitting of Raw materials	Printing, Weaving, Knitting and Embroiling Textiles		Yarning and Spinning
		Fashion Trend Forecasting, Illustration	Suppliers	
Fabric Manufacturers		Fashion and Textile Design		Fabric Production
Garment Manufacturers	Manufacturing of Clothing	Manufacturing and Distribution	Manufacturing	Clothing Manufacturing
			Warehousing	
			Transportation	
Distributors			Distributors	
		Fashion Sales and Marketing		
			Wholesale	
Retailers	Retail	Fashion Retail	Retail	Retail

When the five variations of the supply-chain models are assessed, it is evident that there are a number of disintermediations in each supply-chain model, with commonalities found within the following echelons of supply of raw material or skills, manufacturing and retail. The researcher, therefore, argues that the most relevant supply-chain model for fashion designers in the retail clothing industry is by Burke (2013:20). On the other hand, Shukla (2016:45) initiated the supply-chain model by broadly characterising the production of raw material or skills as merely "supply", so although Shukla's supply-chain model is not industry-specific, it outlines what the other echelons within the clothing fashion industry can be characterised as in broader terms. Furthermore, the supply-chain models by Forza and Vinelli (1997), Sen (2008:571) and Kumar and Suganya (2017:4-7) are notably characterised as clothing and textile supply chains and do not specifically focus on fashion designers' contributions and functions within the supply chain.

Though all the echelons that are discussed below, have a primary function within the supply chain, it should be noted that entities can function as both primary and supporting members of the supply chain. At the same time, an entity can have a primary function related to one process and then a supporting function related to another process (Lambert et al., 1998:6).

3.2.3.1. Fashion Forecasting

According to Burke (2013:20), the linking function to textile development is fashion forecasting, which is the process of collating information of the latest global fashion trends and fads to allow fashion designers the ability to predict colours, yarns, fabrics, silhouettes and styles for a specified fashion season (Burke 2013: 24). The fashion-forecasting echelon is integral to the production of yarn, as mills use the information provided to produce the relevant colours for the season, considering the potential requirements from fabric weavers and knitters (Jackson & Shaw, 2001:54).

Fashion forecasting, furthermore, assists the value chain in tracking information to evaluate the future of the fashion industry, the trends and issues impacting on the direction of entrepreneurial business in the retail clothing environment, and the identification of entrepreneurial opportunities within the value chain (Granger & Sterling, 2012:2). This fashion-forecasting information influences fashion through the trickling-up and trickling-down of information: the trickle-down of information flows from high fashion sources such as haute-couture fashion and down to the mass market, while the trickle-up of information flows from street fashion, cultural subgroups or the general mass market up to influence high fashion (Posner, 2015:13).

Fashion-forecasting packages are generally published one or two years in advance and may cost above €1 000 (over R15 000.00), as the process requires the correlation of books and online resources compiled by entities who have either gone through extensive travel to seek out preliminary signs of change or have attended think-tank seminars with experts on social, cultural and creative movements (Giertz-Mårtenson, 2010:138). Though the fashion-forecasting function appears to be costly, Gaimster (2012:169) proved that the nature of fashion forecasting had changed dramatically due to technological innovations speeding up the flow of free information, resulting in the creation of a more diverse marketplace.

3.2.3.2. Fashion Designers

South African fashion designers are discussed in more detail in Chapter Two. However, it is important to note that for the context of this research study, Shukla's (2016:45) approach to the supply-chain model will be applied by classifying the principal suppliers as South African fashion designers, supported by the textile industry, which supplies the raw material to the fashion designers. For textile to reach fashion designers, the value-added chain involves fibre production, spinning, weaving/knitting, cutting and sewing, thus ending the echelon with finished fabric (Tobler-Rohr, 2011:45-46). The textile stakeholders such as textile designers work closely with fashion designers, designing printed, woven, knitted and embroidered fabrics in addition to trims for the clothing industry, among other industries (Burke, 2013:24).

Fashion design involves fast-fashion and slow-fashion strategies. Fast fashion is referenced as a fashion-design strategy that is aimed at creating fashionable merchandise efficiently while responding to consumer demand rapidly, while slow fashion is a strategy associated with designs for "long-lasting" clothing that are not in response to rapidly changing trends (Zarley Watson & Yan, 2013:141).

Over time, the apparel industry evaluated the impact of clothing on sustainability, and as a result, slow fashion emerged as a sustainable solution (Jung & Jin, 2014:510). Opposingly, Fletcher (2010:259), argued that fast fashion was not necessarily unsustainable but a strategy that delivered economic growth and increased sales. However, expedited manufacturing in fast fashion resulted in low quality, poor working conditions, low prices and apparel with a short life cycle due to the fast-changing trends (Jung & Jin, 2016:14).

Nonetheless, this research study recognised that the slow-fashion strategy ensures responsible production, adds value to garments because of high quality, and anticipates the connection between the environment and the garment-construction process (Cataldi et al., 2010:iv). Slow fashion was found to be attributed to the value-added model, creating value for customers mainly through exclusivity, while other dimensions considered were equity, authenticity, functionality, localism and exclusivity (Jung & Jin, 2016:13). Slow fashion was further evaluated as a concept with guidelines in how fashion design should approach consumption, production, design and waste, where dimensions such as quality, awareness, integrity, creativity, diversity and balance are important (Johansson, 2010:79).

The type of fashion designed had a huge impact of the entire value chain, from fibre to ready garments. Also, local production is said to be a key feature in the slow-fashion supply chain, because a shift occurs from quantity to quality as the pace is slowed down. In addition, the slow-fashion supply-chain model is suggested to be circular instead of linear (Johansson, 2010:86). It is common practice for established fashion designers in Australia and other western countries to work with smaller quantities of about 100 units per style (Lindgren et al., 2010:604).

Considering the abovementioned, Ozdamar Ertekin and Atik (2015:66) found that it was still unclear whether the slow-fashion strategy would be able to challenge the dominance of the fast-fashion strategy.

3.2.3.3. Manufacturers

As previously mentioned, the supplier's roles underwrite the manufacturing process. Christopher and Peck (2004:15) strongly advocated that when a business selected a manufacturer, the risk awareness of that service provider should be evaluated.

While fashion businesses used to produce everything in-house, they have increased their outsourcing to gain competitive advantage and lower manufacturing costs, while reducing internal capital expenditure on training, supervision, workforce and non-core equipment and systems (Burke, 2013:47). Nonetheless, disadvantages to be taken into consideration when outsourcing include quality management, restrictions on capacity, probabilities of satisfying due dates, disruption risks, discounting schemes, and the reliability and flexibility of the selected suppliers (Kaya, 2011:168).

One other major disadvantage of outsourcing is the communication barriers between the fashion designer and the manufacturer, though outsourcing locally enables the fashion designer to employ the manufacturers when needed (Burke, 2013:47). When considering the number of manufacturers to outsource to, Christopher and Peck (2004:15) point out that though it could be beneficial for one manufacturer to be responsible for the supply of a specific product to ensure high levels of cost and quality management, the “one-stop shop” could potentially pose a risk in terms of achieving efficiency.

Sirilertsuwan et al. (2018:1346) revealed that close-proximity clothing manufacturing advances sustainability while benefiting the bottom line. Their findings further showed that governments’ role in supporting the improvement of proximity manufacturing involved the formation of clothing-industry clusters with different types of suppliers and service providers; the issuing of favourable trade policies; the utilisation of carbon-footprint taxation on imported garments; the offering of tax credit for proximity garments; recycling-programmes support; machinery, technology and business-operations financing support; education support; process-development support; business-collaboration support; technical business-infrastructure support; the sharing of resources with neighbouring governments; the implementations of environmental laws and regulations for water usage, chemical release, gas emission and filtration technology; the offering of clean sources of energy; beneficial labour laws and regulations; stringent health regulations and laws; and, finally, the passing of acts to ensure that the country of origin can be identified in advertising.

Conversely, small-business proximity manufacturing required other small manufacturers specialising in a smaller niche market (Burke, 2013:47). With the need for proximity clothing manufacturing and the strength of international clothing manufacturers, manufacturers are now compelled to be more competitive than ever, with pricing, design, quality, delivery and value for money, as the current market exhorts pressure (Jackson & Shaw, 2001:137).

3.2.3.4. Fashion Marketing

Fashion marketing is the function of informing customers through a means of promotion and advertising about fashion products and services, while sales involve the process of business-to-business (B2B) selling within the fashion industry, for example, suppliers (fashion designers) selling to retailers (Burke, 2013:22). Marketing is additionally defined as the management process focused on meeting the organisation's long-term goals through the anticipation, identification and satisfaction of customer needs, while the organisation also focuses on internal factors that affect the marketing goals (Easey, 2009:3).

The marketing concept is also referred to as the marketing philosophy, with the philosophy characterised as the long-term position or overall vision for the entire business including the business concept and operations (Barnes et al., 2013:183). Fashion marketing strongly assists the fashion value chain through marketing research, product management, fashion promotions, fashion distribution and fashion product positioning together with pricing (Easey, 2009:3).

A market is a place for buying and selling, for exchanging goods and services for money (Easey, 2009:13). The South African market comprises a total of 58,8 million people, with an estimated 17,84 million between the ages of 18 and 35, which constitutes almost a third of the population, and with 9,04 million males and 8,80 million females; only 13% of the youth between 20-34 are graduates (Statistics South Africa, 2019). Earlier reports recorded that 79.3% of people were living in formal settlements, 5.9% were living in traditional settlements, 13.9% were living in informal settlements and 0.9% were living in other settlements (Socio-Economic Rights Institute of South Africa, 2018:6).

The marketing mix is a sequence of rudiments, which were initially referred to as the "4Ps" and later developed to "7Ps", are the integrated contributions of all functions within the value chain: product, price, promotion, place, people, process and physical evidence (Jackson & Shaw, 2001:62-63). Fashion marketing in the retail environment is also referred to as the silent seller, as it is estimated that 70% of buying decisions are made in-store, making the element of the retail environment essential for the value chain (Barnes et al., 2013:90). Physical or bricks and mortar stores, therefore, function as a marketing tool, through communicating window displays, in-store visual merchandising, store layout, word of mouth through other customers, sales personnel and the overall atmosphere of the store (Barnes et al., 2013:32).

3.2.3.5. Fashion Retail

Retailing can be defined as the combination of activities that markets products and/or services to consumers for their personal use, by supplying a large scale of products and/or services (McCormick et al., 2014:228), in simpler terms, retailing seeks to give consumers what they want (Mudeliar, 2008:9).

While this sounds simple on paper, in the past decades retail has encountered a more sophisticated and demanding customer while managing unanticipated competition domestically and internationally (Terblanche & Boshoff, 2004:1), which has led to the need for the reshaping of supply-chain models (Azuma et al., 2009:83). Jens and Elg (2018:339-340) demonstrated that there is a close link between corporate social responsibility (CSR) and buyer-supplier responsibility, as the relationship retailers have with their suppliers is important to the development of responsible and sustainable retail.

The retail structures discussed in Chapter Two are either business-to-customer (B2C) retail strategies or B2B retail strategies, where sales and negotiations involve wholesale, resulting in larger units and more indirect contact with the consumer (Burke, 2013:102). The main advantages of B2C retail structures such as designer stores are that, first, they allow the designer to work without a middle agent, thus increasing profit margins; second, the designer can remain close to the consumer to test the market effectively; third, the fashion designer is available to meet with his/her customers and personally interact with them, creating better relationships; and, last, the fashion designers deal with immediate cash payments as opposed to B2B where invoice payments could potentially take up to ninety (90) days (Burke, 2013:97).

3.2.4. Supply Chain Management Model Integration

Christopher (2005:1) explained that supply-chain management included the upstream and downstream relationship with suppliers, distributors and clients to accomplish better value for the supply chain. Christopher and Towill (2002:3) further demonstrated that the flow of orders was upstream, while the flow of material was downstream. In support, Ayers and Odegaard (2017:8) clarified that in some instances, the upstream trading partners, such as the flow from retailers up to distributors, are referred to as the “supply chain partners”, while the downstream trading partners, such as the flow from manufacturers down to distributors, are referred to as the "demand chain".

Masteika and Čepinskis (2015:832) illustrated that materials flowed forward, starting with the planning process by suppliers, then forecasting, followed by procurement, trailed by manufacturing, proceeded by distribution and logistics, and finally carried through to customers. However, the limited exchange of information between adjacent entities within the supply-chain-management model created unforeseeable problems that could have been avoided through the flow of information (Christopher & Peck, 2004:12).

These uncertainties and complications of supply-chain-management models required new integrations within the supply-chain-management model, including the forward flow of information and backward flow of cash (Masteika & Čepinskis, 2015:832). A manufacturer that engaged and was involved in retail activities would be considered as "forward integrated", whereas a retailer engaged in production would be referred to as "backward integrated". This forward and backward integration is also referred to as "vertical integration" (Ayers & Odegaard, 2017:7).

In relation to the quick-response model, Christopher and Towill (2002:2-3) elucidated that the supply chain consists of bi-directional flows, the forward flow from the producer to the customer, followed by the backward flow of information about customer demand and orders, and over and above that, a backward flow of information that assists retailers to acquire the required margins, regardless of retail formats (Ayers & Odegaard, 2017:7). For example, the success of the Zara supply chain is attributable not to a one-way flow of information, but rather to a consistent exchange of information from customers to store managers, from store managers to market specialists and designers, from designers to production staff, from buyers to subcontractors, and from warehouse managers to distribution, signifying the entire supply chain (Ferdows et al., 2005:1).

It is important to note that backward integration is crucial, and Peck (2005:211) advised that the principle of having a strategy that kept some options open should be applied when developing a resilient supply-chain-management model.

Burke (2013:21), in concurrence with Peck, stated that the fashion supply chain is capable of vertical growth by means of expanding business activities up and down the supply chain. For example, a fashion designer can either move up the supply chain by printing and designing his/her own fabric, or move down the supply chain by getting involved in manufacturing, distribution and retail processes. It becomes valuable when individual businesses and those who manage them comprehend the coverage of the network in which they are involved directly or indirectly and for those business entities to systematically explore the network in order to identify its vulnerabilities (Christopher & Peck, 2004:8). Through this exploration, the value of the fashion business can potentially be expanded to horizontal growth, which is achieved through the development of additional product ranges and through the provision of additional services, such as pattern-making services, web-design services or fashion-illustration services (Burke, 2013:21).

Christopher and Peck (2004:13,17) further stated that the way forward in creating a resilient supply chain is through high-level collaboration between entities within the supply chain, but creating the conditions in which collaborative working becomes possible could potentially pose some challenges. Recognising this need, Ayers and Odegaard (2017:12-13), in agreement with Christopher and Peck, pointed out that there are limitations of those needed skills to implement the undertakings. However, those limitations could be avoided through the implementation of collaborative relationships, first within the organisational structures to support the external collaborative relationships, second through forging up and down supply-chain partnerships with trading partners to gain competitive advantage, and third through managing supply-chain information employing technological advances.

Christopher and Peck (2004:1) further reiterated that improved management and control of internal processes and information flow within and between the supply-chain entities would assist with the attainment of the ideals of a fully integrated efficient and effective supply-chain-management model capable of creating sustainability.

Notably, most retailers work with layers of bureaucracy, creating a communication barrier between departments, but Zara's operational structures and performance measurements, together with its office layouts, are all designed for simple information transfer (Ferdows et al., 2005:1).

3.3. Chapter Summary

The supply chain, value chain and supply-chain management definitions were extensively explored and supported by substantial illustrations of supply-chain models, while Burke (2013:20) reinforced the supply-chain-management model theory for fashion designers within the retail environment. The fashion supply chain was characterised as volatile, unpredictable, complex and diverse, so efficient supply-chain-management practices ought to be explored to facilitate success (Sen, 2006:571).

The supply-chain-management strategies were explored in literature, as lean, agile or leagile (hybrid). Though these strategies have been linked to the fashion supply-chain-management models, the literature has not systematically explored how these strategies should be applied or integrated within the supply-chain-management models to ensure efficiency and sustainability for South African fashion designers in retail. Also, the echelons do not follow a standardised model throughout the literature, as diverse markets require differentiated supply-chain models to gain competitive advantage (Christopher & Towill, 2002:1).

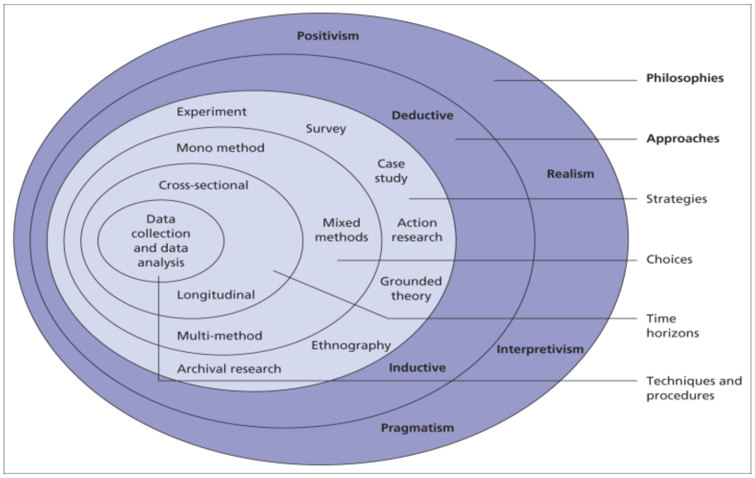
The literature covering supply-chain-management model integration explored prodigious recommendations. It was evident that each supply-chain-management model is unique, and it is therefore critical that the integration recommendations are correspondingly unique to the customised supply-chain-management model. The discourse of South African fashion designers' collaborations with retailers, suppliers and the various stakeholders across the supply chain is a notable gap in the literature.

Before exploring the research findings in Chapter Five, the research methodology used to establish the means to develop an effective and sustainable supply-chain model for South African fashion designers in the retail clothing industry is discussed in detail in the following chapter.

CHAPTER FOUR: RESEARCH METHODOLOGY

The previous chapter reviewed various works of literature to define and explain the concepts linked to this research study. This chapter aims to highlight the research methodology employed to reach the findings of this research study.

Research methodology is described as a discipline that evaluates and describes the reasoning behind suitable research techniques and methods for a particular research study (Welman et al., 2005:2). The research onion (Figure 4.1) is a diagram that illustrates the various methodological choices, with considerations that include research philosophies, research approaches, research strategies, research choices and time horizons (Saunders et al., 2015:125).



Saunders et al. (2015:125)

Figure 4.1: Research Onion

This research-methodology section followed the research-onion process. According to the research onion, to describe and justify the reasoning behind the type of research embarked on, the philosophies, approaches, strategies, choices, time horizons and techniques/procedures of the research study required articulate justification.

First, the research philosophies for this study will be discussed.

4.1. Research Philosophy

Saunders et al. (2015:126) defined research philosophy as the expansion of knowledge and the character of that knowledge, and further posited that epistemology, ontology and axiology are the three main differences in thinking about research philosophies. At the core of research philosophy is knowledge: the researcher's nature of knowledge, the development of knowledge and the source of that knowledge (Bajpai, 2011:20).

In essence, epistemology refers to knowledge and how that knowledge is created, gathered and presented in research (Tennis, 2008:103). In detail, epistemology is the branch of philosophy that focuses on how a researcher knows certain information, through either interpretivism, pragmatism, positivism, operationalism, referential, instrumentalism, empiricism, rationalism or realism, which determines the type of knowledge created (Tennis, 2008:102,103).

This research study took the philosophical perspective of interpretivism. The epistemic stance of interpretivism dictates that in creating knowledge, it is imperative to understand the role of individuals in their respective circumstances, thus interpretivism emphasises the necessity of conducting research among individuals in their particular roles (Saunders et al., 2015:129). This study conducted research among South African fashion designers in their roles within the retail clothing industry.

Alternative epistemic philosophical assumptions were positivism and realism, which both take the approach of a natural scientist, relating to knowledge in a scientific manner. However, positivism utilises value-free approaches and highly structured methodologies, while the essence of realism is that objects exist independent of the human mind (Saunders et al., 2015:126-129).

Ontology is the branch of philosophy that focuses on entities that exist and/or are to exist; simply defined, ontology (derived from the Greek) is the learning discipline of "being" (Lawson, 2004:1). Subjectivism and objectivism are philosophies derived from ontology (Saunders et al., 2015:9), and the ontological stance of this study was based on subjectivism. Objectivism does not consider the social actors that exist within a certain reality, while subjectivism considers the existence of different preferences, knowledge and expectations of individuals and/or entities, therefore considering the details of individuals' creativity and autonomy when making decisions (Foss et al., 2008:74). Remnyi et al. (1998:35, cited by Saunders et al., 2015:11) elaborated that to understand the reality of the situation, a researcher should study the details of the existent situation. As a result, this research study was based on studying the details of the supply chain utilised by different South African fashion designers producing for the retail clothing industry to understand their subjective realities in depth, to document and subsequently develop the best effective and sustainable supply-chain model derived from existing models and South African fashion designers' current and future needs. In a study about the development of streetwear and the role of New York City, London and Supreme NY, Rajendran (2012:11) utilised an offspring of the philosophy of pragmatism and categorised the research-philosophy approach as subjectivism.

However, while epistemology, ontology and axiology are the three main stances to take in research philosophy, pragmatism argues that the research questions are the most important determinants of the research philosophy to be adopted (Saunders et al., 2015:12). Furthermore, the focal point of pragmatism is the investigation of individuals' experiences as problematic situations materialise (Shields, 1998:197). Accordingly, the pragmatism approach was also applied in this research study, where each philosophical approach was implemented according to each research question or problematic situation that emerges.

The research approach supported by the research philosophies will be discussed next.

4.2. Research Approach

To reach the objectives of this research study, empirical information was collected through the qualitative approach. Denzin and Lincoln (2000:3, cited by Snape & Spencer, 2003:3) described qualitative research as the "interpretive, naturalistic approach to the world", and to reach the goal of this study, a naturalistic approach towards South African fashion designers in the retail clothing industry was followed to determine and interpret South African fashion designers' ideal supply-chain requirements.

Snape and Spencer (2003:4) further explicated that qualitative research is an approach that presents a comprehensive understanding of the research participants' environment (South African fashion designers in the retail clothing environment) through evaluating their substantial societal conditions or situations (supply-chain models in support of the retail clothing environment). For example, in a study about bespoke tailoring, Almond (2012:7) made use of the qualitative research approach, as the nature of the research was focused on a small specific group of people. Lindgren et al. (2010:598) also made use of the qualitative method as they researched Australian fashion designers and the potential nexus with China.

This research study moreover pursued an inductive-theory-building method, where theory followed the research data (Saunders et al., 2015:20). Accordingly, the theory (of the effective and sustainable supply-chain model) was the result of empirical realities (of South African fashion designers in the retail environment), resulting in a conclusive reasoning influenced by reality (Welman et al., 2005:34). This research study consequently investigated the realities of different South African fashion designers' current supply-chain models and product types produced in conjunction with the requirements and prescriptions of the retail clothing industry in order to document and develop the critical components of an effective and sustainable supply-chain model according to clothing retailers' needs and/or recommendations.

In application, this research study made use of only one research method, the qualitative method, and this utilisation of one research model is referred to as a mono-method (Azorin & Cameron, 2010:96).

The research strategies applied in conjunction with the research approach are discussed next.

4.3. Research Strategy

A research strategy refers to the action plan (data-collection process), which provides direction in order to conduct research systematically, to produce accurate results and detailed reporting (Dinnen, 2014:1).

4.3.1. Grounded Theories

As this was a qualitative research study, theory was developed while collecting data. This illustrated an inductive method of collecting data, which therefore grounded the theory in data. This method is referred to as "grounded theory" (Neuman, 2011:177). Grounded theory is a flexible approach, allowing the theory and the data to relate. It allowed the researcher to remain open to the unanticipated, to compare the data collected to determine the differences and similarities, and to build, organise and analyse data to develop concepts or models which that (Neuman, 2011:177).

As the most effective and sustainable supply-chain model for South African fashion designers was unknown during the data-collection process, it was imperative for this research study to remain flexible and open to the unanticipated data collected from South African fashion designers, retailers and other participants from the fashion value chain. Once the data was collected, it was then interpreted with the assistance of a qualitative data analysis software called Atlas.ti.

Individual responses from participants were evaluated to deduce a general theory through the grounded-theory approach (Welman et al., 2005:34). Applicably, individual South African fashion designers in the retail clothing environment were evaluated separately to enable a general theory of an effective and sustainable supply-chain-management model. Charmaz (2011:363) further reveals that grounded theory includes but is not limited to sorting, synthesising and summarising data as a researcher takes it apart and defines how that data is linked. For instance, in a fashion-related study to research the decision process of fast-fashion consumers versus slow-fashion consumers, Barnes et al. (2013:145) applied the grounded-theory strategy, as it allowed the researcher to take the data and discover meaning within the inductive data.

4.3.2. Interviews

The interview method is research based on presenting a research participant with oral-verbal questions, with the intention of receiving oral-verbal responses, face-to-face, telephonically and/or online (Kothari, 2004:97,100). Legard et al. (2003:138) associate in-depth interviews with qualitative research, and further postulated that though an in-depth interview may appear naturalistic, it will have a minimal resemblance to an everyday conversation.

Jensen and Laurie (2016:173) pointed out that to allow the scope of conversation to flow effortlessly in an interview, semi-structured interviews were ideal, as this allowed the participants to answer the questions unreservedly based on their own personal and professional experience. Furthermore, semi-structured interviews enabled the researcher and the participants to collaborate and develop a joint understanding of the research. The input of experienced South African fashion designers and clothing retailers was deemed indispensable to this research study, to especially establish the challenges South African fashion designers experienced when managing their supply chains and determine the best practices for supply-chain efficiency and economic sustainability.

Van der Westhuizen (2007:110) made use of the interview strategy in the research work on the South African clothing industry, and sought out participants primarily on a basis of representivity and with high levels of involvement in the clothing industry. Similarly, Lindgren et al. (2010:603) conducted semi-structured interviews while collecting data for a study related to fashion designers in Australia.

4.3.3. Time Horizon

Neuman (2011:44) expounded that time is a measurement of every research study. Time could be incorporated cross-sectionally, by gathering data at one point in time, or longitudinally, by gathering data at multiple time points for a longer period of time.

Cross-sectional studies are referred to as “status” or “one-shot” studies, which determine the overall view of the situation at the point in time, and which is paramount in determining the prevalence of a specified situation (Kumar, 2014:368). Lui (2008:2) noted that cross-sectional data did not mean that all participants provided data in one exact moment or even in one session, but that participants provided data over a short duration of time, therefore time was assumed to produce variance and not bias.

Longitudinal studies involve accumulating data at multiple time points, and depict a moving illustration of circumstances, individuals or social relations over time. Hence longitudinal studies are not a result of the length of time taken to research a field of study but the result of a research study that incorporates time (Neuman, 2011:44). With longitudinal studies, the participants are frequently visited, usually over a long period of time, to evaluate trends, changes and/or patterns of that particular study (Kumar, 2014:138).

With this research study, the participants were visited once, between April 2019 and September 2019, to collect data that would determine the overall view of South African fashion designers in the retail clothing industry and their supply-chain mechanisms. The feedback received, data collected and analysis conducted of South African fashion designers in the retail clothing environment, was then compared to the theory available and practices of current clothing supply chains, in order to develop an effective and sustainable supply-chain-management model. For example, in a study to research the ethical climate and job attitude in fashion retail employees' turnover intention and perceived organisational sustainability, Lee and Ha-Brookshire (2017:15) made use of a cross-sectional study to investigate the USA's fashion retail employees.

Lewis (2003:54) suggested that cross-sectional studies are best suited for macro-level change, where the focus of change is broad and is not individual-based. This research study, therefore, aimed to achieve macro-level change for South African fashion designers in the retail environment by developing an effective and sustainable supply-chain-management model. As this study was cross-sectional, the data collected was compared to other theories of clothing supply chains, as well as data collected from South African fashion designers, retailers and supporting stakeholders, instead of comparing two distinct time points, as in longitudinal studies. Additionally, as a cross-sectional study, this research evaluated what would be deemed an effective and sustainable supply-chain model, post examining current clothing supply-chain theories and interviewing South African fashion designers, retailers and supporting stakeholders, instead of studying the pattern of change or trends, due to time, as in longitudinal studies.

The ethical considerations for the research strategies and this entire research study are discussed next.

4.4. Ethical Considerations

Ethical consideration pertains to the principles and values that guide a researcher's objectives, responsibilities towards participants, the institutions the research is supported by, and the researcher (Jensen & Laurie, 2016:49).

The branch of philosophy concerned with the nature, origin and stability of values is referred to as axiology (Tomar, 2014:51). Axiology is concerned with ensuring that the researcher's values and judgement of values, aesthetically and ethically, are of high importance for credible research results (Saunders et al., 2015:10). Tomar (2014:52) further pointed out that values guide the researcher's decision-making process, relating to what is true, right and wrong.

Ethical considerations for a researcher include informed consent from participants, anonymity and confidentiality, protecting participants from harm, and protecting researchers from harm (Lewis, 2003:66-70). As ethics are concerned with matters such as plagiarism, participant recruitment (during the data-collection process) and the reporting of results (Welman et al., 2005:181), ethical considerations thus affect the researcher, participants and stakeholders (Louw, 2014:273).

4.4.1. Informed Consent

Informed consent relates to the participants' ability to make a voluntary decision to participate in the research study, due to sufficient information and the format of comprehensive information provided by the researcher about the research study (Hennink et al., 2011:63). Louw (2014:264) elaborated that informed consent from participants signifies that participants would have had a clear understanding of their involvement in the research study, would have had a lucid explanation of the type of research study being conducted and would have had knowledge of whether or not their identities would be protected, which also deals with issues of anonymity and confidentiality, discussed in the next section.

Individuals such as elderly persons, individuals in crisis, individuals who cannot understand the language the research was conducted in, individuals dependent on the researcher for services, and minors were not permitted give informed consent, as these groups of individuals did not have the mental and/or legal capacity to authorise their participation in this research study (Schinke & Gilchrist, 1993:83, cited by Kumar, 2014:285). To ensure informed consent, consent forms were issued to all participants interviewed.

4.4.2. Anonymity and Confidentiality

Anonymity means that the identity of the participants would be known only by the researcher, and confidentiality means avoiding direct and indirect attribution and identification of participants in research reports (Lewis, 2003:67). To ensure respondents' confidentiality, the information collected from the participants was not shared with others for any other purpose outside of the research study, and the study population was not identified in the context of the research findings (Kumar, 2014:286).

Confidentiality also attributes that though the researcher can match the participants' responses to their identities (as in the case of one-on-one in-depth interviews), the information collected was not linked directly to the participant, and furthermore, anonymity promised participants that their names would not be recorded and their identities would not be matched to their responses at any point of the research process (Louw, 2014:267).

To ensure anonymity and confidentiality, the interviews recorded did not include personal details of participants. Though it is evident that some details of the organisations and participants will be known to the researcher, the consent forms issued to participants stipulated that their participation and the information provided would be subject to confidentiality and anonymity, and thus the personal details of participants and organisations would not be documented in the reports.

4.4.3. Protecting Participants from Harm

Jensen and Laurie (2016:48) argued that participants can encounter harm in various ways because of research studies, through feelings of victimisation because of misinterpretation or misuse of information, and through feelings of loss of control or breach of trust if their privacy was not adequately protected. Furthermore, participants could encounter harm physically, which related to the participants' safety and security; psychological harm, placing participants under stress or anxiety; legal harm; and economical harm, which could affect participants' careers and income (Neuman, 2011:147-149).

To ensure that the participants would be protected from harm, interviews were administered at scheduled times, which were most suitable for the participants. The interviews were conducted at the participants' workplace or in a suitable public setting which was most convenient for participants and appropriate for the interviews.

In addition, sufficient coding was utilised to ensure the accuracy of the interpreted data and also to avoid the misuse of data.

4.4.4. Additional Ethical Considerations

Additional ethical considerations for researchers included avoiding bias, utilising appropriate research methodology, correct reporting of research, and appropriate use of information from primary and secondary sources (Kumar, 2014:287-288). Inappropriate use of information refers to the use of data collected in a particular study for any other reasons outside of the research objectives. Incorrect reporting is the distortion of results where a researcher would give out-of-context quotations or emphasise certain points over other important points; and this is closely linked to falsifying information, which involves deliberately fabricating or changing data. Inappropriate methodology is research that is deemed harmful or unsuitable for the purpose of the research, while bias in research is the researchers' desire or leaning expectation to achieve a certain type of results (Louw, 2014:269-271).

There was an undertaking by the researcher through a memorandum of understanding (MOU) to represent the Cape Peninsula University of Technology (CPUT) in the most professional and ethical manner, which included avoiding bias in any form, utilising appropriate research methodology, and correctly reporting the research collected. Furthermore, this research study was cleared by CPUT's ethics committee, and an ethical clearance certificate was duly issued, which is included in the appendices. A plagiarism form has also been attached to the appendices of this research study.

4.5. Reliability and Validity

4.5.1. Reliability

First, reliability refers to the accuracy of the research, which is determined by the dependability, consistency, predictability, stability and honesty of the research instruments (Kumar, 2014:215). Second, reliability relates to the credibility of the research findings and the extent to which the research findings can be generalised and replicated (Welman et al., 2005:145). Third, reliability is a criterion that observes the quality of research in reference to the measures used and data collected to provide consistent results (Jensen & Laurie, 2016:143). The concept of quality in qualitative research relates to generating understanding for the topic (Stenbacka, 2001:551, cited by Tomar, 2014:601).

Keeping the above mentioned in mind, questions related to improving reliability in qualitative research are fundamental. Lewis and Ritchie (2003:272) underscored that for a researcher to ensure reliability, they should question the level of bias in the sample design/selection, the consistency in the fieldwork, the systematic analysis of comprehensive data, the evidence supporting the interpretation of data, and whether the design/conduct of the data collection represents participants' perspectives equally.

To ensure the reliability and dependability of a research study, the integration between the data-collection process, data analysis and theory generation needs to be of high quality (Koonin, 2014:259). To ascertain high quality of dependability in this research study, an extensive and detailed record of the data-collection process was imperative, so that other researchers could duplicate the process if necessary (Kumar, 2014:219).

Furthermore, Miles and Huberman (1994, cited by Franklin & Ballan, 2001:275) pointed out that to assess reliability in qualitative research, the research questions should be clear, the researcher's function within the research site should be explicitly described, findings should show significant parallelism across data sources, basic paradigms and analytic constructs should be clearly specified, data should be collected in conjunction with the research questions, correct data-collection protocols should be followed, data quality together with coding checks should be applied, detailed accounts of observations should be made, and peer-review systems should be in place.

In summary, reliability was assessed by a careful documentation of procedures utilised for generating and interpreting data (Schwandt, 2015:271). The documentation of interviews was through a voice-recording device, followed by a detailed transcription of recordings and accurate presentation of extracted data, including additional questions that provoked certain answers (Silverman, 2014:85-88).

4.5.2. Validity

Validity refers to the accuracy of the research findings in relation to the reality of the situation researched (Welman et al., 2005:142). Comprehensively, validity signifies the accuracy of the range of information gathered from the participants in proximity to the concept studied by the researcher (Jensen & Laurie, 2016:143). In addition, validity is a construct referenced to the quality and ability of the research instrument to measure the research questions (Kumar, 2014:215).

In summary, validity is understood as the "correctness" or "precision" of the reading of the research (Lewis & Ritchie, 2003:273). Furthermore, Lewis and Ritchie (2003:274) argued that researchers are required to ask themselves reflective questions when determining validity: first, whether there was any bias in the sample design/selection; second, whether the quality of questions was conducive to the participants' fully articulating their perspectives; third, researchers if the research questions had been identified, categorised and labelled accordingly; fourth, if the interpretation of the respondents' feedback was accurate; and last, whether the display of the findings was a true representation of the original data, with a clear analytical construction.

Neuman (2011:220) asserted that the measurement of validity in qualitative studies does not require a fixed demonstration of abstracts and a standard measurement of variables. As a result, this research study ensured validity by first ensuring credibility through accurately interpreting data collected from participants (Koonin, 2014:258). Also, three trial interviews were undertaken to test the clarity of the interview questions. In qualitative research, the participants are the most paramount judges to determine validity, as the research explored the participants' experiences, perceptions and believes, therefore the validation, confirmation and approval would be in accordance with the participants' concordance (Kumar, 2014:219). Additionally, validity increases when data proves to be plausible, when it is supported by frequent varied empirical data, and when varied records were searched and judged to form a connection among them (Neuman, 2011:220).

Practically, for other researchers to replicate and follow the research process adopted for this research study (ensuring validity), the processes adopted were thoroughly and explicitly described (Kumar, 2014:219). The sampling and data-analysis processes adopted are described in detail below.

4.6. Sampling Considerations

Unlike quantitative research, qualitative research is more interested in the relevance of processes and situations when sampling a population, rather than individuals and characteristics (Silverman, 2014:67). Kumar (2014:248) highlighted that, unlike in quantitative research, in qualitative research first data is collected without a sample size in mind but rather until a point of saturation is reached and, second, a researcher's judgment is guided by the population that provided the best information for the research, instead of being guided by a random sample as in quantitative research. In this research study, the sampling judgment was guided by the population's perceived experiences within the retail clothing industry while working with or as South African fashion designers, as a result, the target population all had over six years of experience in their respective fields.

Theoretical or purposive sampling is when a sample is chosen on the basis of relevance to the research questions or analytical framework, or the development of an account within the research study and according to the sampling logic (Schwandt, 2015:277). Fundamentally, purposive sampling focuses on the processes of interest within the research study (Silverman, 2014:60,62).

In line with theoretical sampling, the selection of the target population was primarily focused on South African fashion designers and retailers, and encompassed fashion educational institutions, fashion councils, fashion business consultants, and government institutions, because theoretical sampling is also concerned with developing a sample that is of significance theoretically, as it includes characteristics that will assist in the development of the theory (Mason, 1996:93-4, cited by Silverman, 2014:62).

Based on the recommendations by Sarantakos (1998:155) and with the abovementioned information in mind, in conclusion, the sample considerations for this research study demonstrate the following characteristics:

- Cases of South African fashion designers' supply chains in the retail clothing environment
- Flexibility in the sample size of South African fashion designers, retailers and supporting organisations
- Purposive and theoretical sampling and not statistical, random or mechanical sampling
- Fewer cases than in quantitative sampling
- Sample size determined by saturation point while the study was in progress, and not a pre-determined sample size. For example, the researcher started to recognise repetitive answers during the data collection proceedings in KwaZulu-Natal, as answers started to reflect similar experiences.
- Sample chosen according to suitability to the study and about its representativeness

4.7. Data Analysis

In qualitative research, data analysis requires a researcher to investigate patterns of data by evaluating recurring behaviour, events and systems, and when the patterns are identified, the researcher will then move from description of empirical data to the interpretation of the data collected (Sarantakos,1998:314).

Coding is one of the key concepts of analysing and interpreting data collected. Coding refers to the classification or categorisation of key concepts of the data collected, and the retrieval of key ideas (Babbie, 2013:396). Coding data from interviews required, first, constant revaluation of transcripts and recordings from interviews; second, notes were essential in identifying content that was of particular importance to the study; and, third, as the essential content was identified brief notes of themes, meanings and ideas were jotted down to identify key variables derived from the data (Swift, 2006:168). Once the interviews were recorded, they were transcribed by a freelance journalist and verified by the researcher who relistened to the recordings while reading the transcriptions. This process of verifying transcripts with recordings assisted the researcher during the coding process as essential content was identified and noted to develop potential code-groups.

This coding strategy in qualitative research is referred to as content analysis. Content analysis is defined as the analysis of content from interviews, which involves the identification of themes, assignment of codes to the main themes, classification of responses under the main themes, and finally the integration of themes and responses into the research report (Kumar, 2014:318). Babbie (2013:397) demonstrated that coding starts with open coding, which is the primary sorting and labelling of data, followed by axial coding, which is the analysis of open coding through the grounded-theory method, intended to identify the important general concepts, and concluding with selective coding, which is building on the results of open coding and axial coding to identify the fundamental concepts that organise the “body of textual material” through grounded theory.

As previously stated, the research strategy for this study was rooted in grounded theory. The purpose of grounded theory in data analysis is to construct and develop new theory, through inductive theory analysis from the data collected, instead of describing or applying existing theories (Charmaz & Bryant, 2011:292, cited by Kumar, 2014:119).

Babbie (2013:400) remarked that in grounded theory, data analysis goes beyond the coding process, but includes memo-writing. In addition, Charmaz (2006:72) noted that memo-writing is an integral method in grounded theory, increasing the abstraction of ideas and ensuring a significant and early involvement in the analysis of data. The functions of the recorded memos were to initiate data exploration, identify and develop model dimensions or properties, compare and probe situations, explore relationships of the data collected, and develop the proposed model (Strauss & Corbin, 2015:117) for South African fashion designers in the retail clothing environment.

Charmaz (2006:82) detailed nine steps to achieve successful memo-writing: one, memos should provide scenarios to research in field settings; two, memos should detail the data-collection processes; three, memos should introduce raw data; four, memos should provide codes and categories; five, memos should ask probing questions regarding codes and categories; six, memos should define each code and category of the collected data; seven, memos should provide sufficient evidence to support the reasoning and definitions of codes, categories and analytical claims; eight, memos should make a comparison of the data collected; and nine, memos should be able to identify gaps in the analysis.

The limitations and delimitations of the research study are discussed in detail in the following section.

4.8. Limitations and Delimitations of Study

4.8.1. Delimitations of Study

Delimitations of the proposed study refer to the scope's characteristics and defined boundaries within the researcher's control that limit the study. Furthermore, delimitations of a study include the objectives chosen, the research questions, variables of interest, adopted theoretical philosophies and the population chosen for investigation (Simon, 2011:2).

In reference to delimitations of the research objectives and questions, this research study was confined to investigating and subsequently developing an effective and the sustainable supply chain for South African fashion designers, to improve their longevity within the retail environment, as supply-chain management affects both internal and external business structures. Nonetheless, this research study recognised that an effective and sustainable supply chain was not the only factor that impacted on South African fashion designers' success and longevity within the retail environment. Entrepreneurial skills, internal operational management, organisational structures and consumer needs are other factors that potentially impact on the success and longevity of South African fashion designers within the retail environment.

In terms of geographic and population delimitations, this research study was conducted only in South Africa, and the population was composed of South African fashion designers, South African retailers and other South African organisations that have an impact on the supply-chain-management model of South African fashion designers in the retail clothing environment, such as certain government departments, fashion educational institutions, fashion councils and business consultants within the fashion industry. However, this research study noted that there are other international retailers and international stakeholders that could have contributed to this research study.

With regards to the philosophical and methodological delimitations, the ontology of this research study was subjective and the epistemology of this research study was focused on interpretivism and pragmatism, reviewing the perceptions, consequent actions and supply-chain interactions of South African fashion designers, representatives from South African retailers and representatives from supporting industries to ensure efficiency and sustainability. Consequently, this research study did not take the objective stance of reviewing research, which is research-based on one true reality of facts and quantifiable variables, making use of actual sample sizes of a set population to easily allow generalisation for set validation (Saunders et al., 2015:4-11).

The limitations of the proposed study elaborating on the methodology and conclusions are discussed in detail in the following section.

4.8.2. Limitation of the Study

Creswell (2012:259) postulated that limitations may specify data-collection problems, unanswered questions by participants, sampling problems or the site of the study. Primarily, limitations of the research are the probable weaknesses of the study, which are out of the researcher's control (Simon, 2011:2).

The analysis of data collected in this research study was limited to the views, feedback and consequent actions of South African fashion designers, South African clothing retailers and supporting institutions at the specified time of the interviews. As a result, there were no quantifiable follow-up interviews to evaluate efficiency and sustainability over time as in longitudinal studies. Instead, the efficiency and sustainability of the supply-chain model was developed based on the expertise and requirements of South African fashion designers, clothing retailers and stakeholders, in concurrence with existing supply-chain theories.

The total population size of South African fashion designers in the retail clothing environment was not documented, and the population included only retailers and supporting industries, so there was a limitation with the population group, as supply-chain-model partners such as manufacturers or CMTs, fabric suppliers and fashion producers could not be reached. The development of an effective and sustainable supply-chain model represented the most valued input from esteemed and experienced fashion designers, retailers and other industry stakeholders in South Africa.

The effective supply-chain model that was developed was limited to South African fashion designers only, as the qualitative research conducted and information obtained was from the South African perspective only and may not be applicable to other African, European, American, Asian or Australian regions, as the perceptions, environment, information and requirements may differ from country to country. Budgetary constraints also limited international travel and hampered extensive travel across South Africa.

4.9. Chapter Summary

This chapter detailed the research methodology of this study, by first establishing the research philosophies as interpretivism, subjectivism and pragmatism. The qualitative method was then introduced as this study's research approach, backed by the inductive-theory-building method. The grounded-theory method was presented as the strategy for this research study, which would be supported by in-depth, semi-structured and cross-sectional interviews. The ethical considerations of this research study underpinned this chapter, with detailed accounts of the processes related to informed consent, anonymity, confidentiality and participants' protection during the data-collection processes.

Included in this chapter was a comprehensive discussion about reliability and validity, sampling considerations, and the limitations and delimitations of this research study.

Additionally, an introduction to the data-analysis process was included in this chapter. This is discussed in more detail in the following chapter, which also gives an analysis of the data collected.

CHAPTER FIVE: DATA ANALYSIS AND FINDINGS

The previous chapter clarified the research methodology and design that was adopted for this research study.

The purpose of this chapter is to comprehensively explain the data-analysis process that was briefly introduced in Chapter Four. Additionally, this chapter will summarise the analysed data and offer an interpretation of that data in relation to the main and supporting research objectives highlighted in Chapter One. Spacey (2017) defines objectives as a breakdown of strategy into a set of achievable targets for a specific purpose, which in this case was the development of an effective and sustainable supply-chain-management model for South African fashion designers in the retail industry.

As discussed in Chapter Four, in-depth, semi-structured interviews were conducted until data saturation was reached. Data was collected with the aid of a voice-recording device which was later used to transcribe each interview in detail. All the data was collected and transcribed in English.

5.1. Data Collection Process and Target Population

A total of twenty-four individual interviews were conducted, with the sample divided into five groups: seven South African fashion designers; seven fashion retailers and agents or consultants; four fashion education institutes, four government institutions, and two fashion councils. The details of the population groups are outlined in Table 2 below.

Participants from the different population groups represented various regions in South Africa; therefore, the researcher travelled to the various provinces to conduct the interviews, once a significant number of appointments were confirmed in one region, by e-mail and/or through a phone conversation.

Table 2: Population Groups

Participants	Region	Number of Participants
Fashion Designer or Fashion Brand Owners	Gauteng	3
	KwaZulu-Natal	2
	Western Cape	2
Total		**7**
Clothing Retailers and Retail Agents	Gauteng	1
	KwaZulu-Natal	2
	Western Cape	4
Total		**7**
Fashion Educational Institution Representatives and Skills Development Agents	KwaZulu-Natal	3
	Western Cape	1
Total		**4**
Government Institutions	National (Based in Gauteng)	1
	KwaZulu-Natal	3
Total		**4**
Fashion Council	KZN Fashion Council	1
	Cape Town Fashion Council	1
Total		**2**
Overall Total		**24**

The interview process would start with a brief introduction to the research study, followed by the signing of the consent form. The researcher had formulated a set of in-depth questions linked to the three objectives of this research study. The questions allocated to government and fashion-council participants were merged into one group, and referred to as "stakeholder questions", while the questions directed at fashion designers, retailers, retail agents/consultants and fashion educators were customised. The in-depth questions for each of the population groups were similar; however, specific questions were excluded to appropriately cover the scope of knowledge for each population group. The interviews were recorded using a portable Olympus VN-541PC voice-recorder with 4GB of memory and 1500-hours of recording time, which allowed the researcher to record all the interviews on one device and easily transfer the recorded data to a laptop for backup.

The in-depth interview questions are outlined in detail in the appendices and are summarised in Table 3 (below).

Table 3: Structure of Interview Questions

Objectives	Fashion Designers & Fashion Brand Owners	Retailers and Retail Agents	Stakeholders	Fashion Educational Institutions
Opening Questions and Introduction	2	2	2	2
Objective 1: Business and Supply Chain Structures of South African Fashion Designers in the Retail Environment	3	2	2	2
Objective 2: Challenges South African Fashion Designers are Experiencing in Managing their Supply Chains for the Retail Clothing Environment	3	3	3	3
Objective 3: Steps and Levels Required in the Supply-Chain-Management Model for South African Fashion Designers in the Retail Environment	2	2	1	1
Objective 4: Leveraging the Supply-Chain-Management Model	3	3	2	2
Objective 5: Achieving Economic Sustainability for South African Fashion Designers in the Retail Environment	2	2	2	2
Closing Questions and Conclusion	1	1	1	1
Totals	**16**	**15**	**13**	**13**

5.2. Data-Analysis Process

The data analysis occurred after the data-collection process. Through the data-analysis process, the empirical data was examined by utilising a coding process intended to simplify the complexity of the data collected and to reach a conclusion based on reasoning (Neuman, 2011:478).

The data collected was analysed through the use of a qualitative data-analysis (QDA) software, otherwise referred to as computer-assisted qualitative data-analysis software (CAQDAS) called Atlas.ti (Hwang, 2008:519). During the analysis of data, Atlas.ti version 8 offered systematic tools for the transcribed data that could not be analysed through the use of statistical approaches (ATLAS.ti, 2018:9).

The coding process allowed large segments of transcribed data to be simplified so that a link and a common thread could be identified and assessed (Belotto, 2018:2525). Practically, coding is the process of allocating categories or concepts to segmented transcriptions that are linked to the research objectives, while code groups are clusters of codes utilised as filters (ATLAS.ti, 2018:11,16). Additionally, sub-codes were allocated to threads or themes that recurred within the codes. Finally, from the five population groups, a total of five code groups, twenty codes and twenty-six sub-codes emerged.

5.3. Data-Interpretation Process and Findings

The data-interpretation process assigns meanings to the data analysed from the multiple participants (Lebied, 2018). This section aims to report on the findings of this research study, based on the research questions and objectives, which are arranged as code groups.

5.3.1. Objective 1 Findings: The Business and Supply-Chain-Management Structures of South African Fashion Designers in the Retail Environment

Figure 5.1 (below) illustrates code-group one and the associated codes of the business and supply-chain structures of South African fashion designers supplying the retail clothing industry. The business structures of retailers working with South African fashion designers were also evaluated in this section. This is the first objective of this research study, referred to as code-group one.

There are three separate codes in code-group one. First, code one explored the fashion business structures of South African fashion designers in the retail environment. Second, code two then determined the fashion designers' business capacity when producing for retail, in association with the business capacity of fashion education and government institutions together with fashion councils. Business capacity is defined as "the maximum level of output that a company can sustain to make a product or provide a service" (Kenton, 2018), which means the maximum level of output that fashion designers sustained while they produced for retail was researched in terms of units, styles and human skilled resources. Finally, code three explored the retailers' capacity and business structures when working with South African fashion designers. As a result, a total of three codes and no sub-codes emerged from this code group, as illustrated below, in Figure 5.1.

Figure 5.1: Objective 1 – Code-Group 1

5.3.1.1. *Code 1: Fashion Business Structures*

The interviews with fashion designers confirmed that their business and supply-chain model structures differed because of their different product types. The first product type discussed is from South African fashion designers that specialised in streetwear and leisurewear; the second group of South African fashion designers discussed originated as bespoke and tailoring fashion designers who then supplied the retail industry.

The researcher observed that the streetwear and leisurewear brands had several businesses and people they worked with at each point of the supply-chain model. As a result, a number of different service providers were acquired by these brands, so long-standing relationships were maintained with external fabric suppliers, printers and retail agents/distributors locally and internationally. Furthermore, it was found that the streetwear and leisurewear brands consistently worked with fine-art and/or graphic artist/s to develop their product ranges with unique and distinguishing aesthetics.

In the comments below, the fashion designers discuss their business and supply-chain-model structures when supplying retail.

11:1 at this stage everything is in one region because obviously, we want eve…… (257:711) - D 11: Participant 2

At this stage, everything is in one region because obviously we want everything as consolidated as much as possible. But we're also getting to a point where printing is done in Durban; they are the cheapest in the country. Our manufacturing has been done in close *proximity but I have found someone else further away from here that we are considering moving to. Our next stage I'd say is a huge thing for us, as we're looking at bringing in our own fabric.*

11:24 three artists, their illustrators, and then I work with one person at…… (17509:18033) - D 11: Participant 2

We work with three artists, their illustrators, and then I work with one person at the fabric wholesale supplier. I'm in liaison with two people from the printers. I deal with the couriers, and then the two CMTs with their owners. Then I obviously deal with our full-time production manager and my business partner, and at this stage, I'm fine with the three of us.

16:10 where we are at the moment is, we restructure and reformulated our comp…… (6854:7779) - D 16: Participant 7

Where we are at the moment is, we restructured and reformulated our company because we used to be based overseas – our head office, although we're from here, it made sense because most of our distribution was there – we stopped all of that and we took a decision to manufacture only in Africa. We would love to only manufacture in SA but that is not possible because of our work skills and etc. So we've shifted the production to SA, Mauritius and Madagascar, and we tried a little up north but it didn't work well. We decided only to open our stores in SA.

16:34 the designing, in-house. The production we make use of different facto…… (18747:19002) - D 16: Participant 7

The designing is in-house. The production, we make use of different factories, which is preferable for us.

16:4 we aim to use, and we do, only African fabric. That means it's either…… (1549:3517) - D 16: Participant 7

We aim to use, and we do, only African fabric. That means it's either from Kenya or from other places in Africa. Egypt of course, Giza cotton, but it's sometimes difficult to get hold of that. We use cotton that's made in the mills, so either Madagascar or Mauritius. It's difficult to use SA mills because there are maybe just two that we can really rely on. But we used to use a lot of fabric from a mill in Durban. So, you plan your fabric, whether its denim or tulle. You get two different sides: you get the knit side, which is your T-shirts, your hoodies, *etc., and then you get the woven side, which would be denim and tulle, that kind of fabric. And the shirts. So, you plan your fabric and plan your production way ahead, you book your space in production. A factory plans their production also way in advance, they do week by week. So, for instance, this week they'll do this brand, that week they'll do that brand, according to their capacity. Some would say we can only manufacture 10 000 per month, some would say 40 000, some would say 200 000. It depends on how big the factory is. So, you book your factory space, where the CMT happens. Then there's printing that you've got to plan, or embroidery or badges or whatever you do. Then you've also got to plan your trims, which kind of thread you're going to use, what kind of labels you're going to use, what kind of swing tabs you're going to use, and so on, packaging.*

The above comments are from streetwear and leisurewear designers, and the common thread that emerged from these comments was that the fashion designers preferred to work with suppliers that were located only in South Africa, and most ideally in close proximity to their offices or studios. The outsourced services mentioned were printing, manufacturing, graphic designing, fabric supply and distribution. One of the most noticeable comments was that the fashion designers still preferred to make use of different production factories when manufacturing.

As mentioned, a majority of the interviewed fashion designers in the retail industry originated as bespoke or tailoring specialists, with over fifteen years of fashion-design experience. It was found that these fashion designers produced their own garments in-house with their own production facilities and with their own work teams.

Though most of the fashion designers produced most of their products in-house, it was not without careful consideration, which resulted in a portion of products being outsourced, as stipulated below by a fraction of participants.

12:1 Our business is divided into two which is Bespoke and we have mass pro…… (349:790) - D 12: Participant 3

Our business is divided into two, which is bespoke, and we have mass production, which is more retail and online. With retail, we're working with an agent and fashion week. What our agent does, they look for suitable retailers all over the world, globally, that will stock our products, and then they would take a certain percentage. We also work with a local high-end department retail store in the same province as our business. Everything is done in-house.

14:1 Our Brand, started as a high-end bespoke business, for obv…… (352:550) - D 14: Participant 5

Our brand started as a high-end bespoke business for obvious reasons – that we wanted to create a luxury product, and for when people think of our brand, they should always think expensive. Along the journey, we have tried to do diffusion lines, with an online retailer and one of the bigger South African retail chains. Initially, we were not really worried about manufacturing and supplying but more focused on building a lifestyle.

15:1 When the brand started, we catered only for menswear, tailor-made to fit…… (353:902) - D 15: Participant 6

When the brand started, we catered only for menswear, tailor-made-to-fit clothes was our focal point, and we never really went the mass-production route or retail. But as the business evolved and as time changed, because every business goes through a growth cycle, so when we were about to hit the maturity level, we realised that you can't overspecialise, sometimes you have to broaden your objectives in business without even diversifying. For us to do that we had to diversify and cater for ladies. Once we were about to hit that ceiling, we realised that the whole notion of only rendering tailor-made-to-fit or custom-made clothing doesn't work or doesn't make business sense for us, so I felt we needed to grow beyond that. That's when we opened up the showroom to generate extra revenue by providing off-the-shelf apparel people can buy.

15:26 Most of our production we do is in-house, I would say 90% of it…… (16406:16702) - D 15: Participant 6

Most of our production we do is in-house, I would say 90% of it. We usually outsource if we have a huge order from a retailer, but if it's less than 50 units I'd rather do it in-house because we often have longer periods to produce.

22:1 the business focuses on clothing, fashion, and lifestyle because it sta…… (329:689) - D 22: Participant 11

The business focuses on clothing, fashion and lifestyle. From 2006 to 2009 we decided to go into training but not leaving the business side of manufacturing garments. But on that side, we were doing more corporate, the premium, for departments (e.g. education), municipalities. At the same time, we were producing for individuals, your high-end fashion.

So, we said because of that decline, we need to check the other opportunities within the industry, such as retail.

28:1 we are a clothing brand, with a ladieswear brand, then menswear brand…… (302:2520) - D 28: Participant 17

We are a clothing brand, with a ladieswear brand, then [a] menswear brand and accessories. We treat them internally as three different brands – accessories, menswear, ladieswear. The creative team is made up of three individuals. One looks after apparel menswear and ladieswear, while the other looks after accessories, and then there would be one person overseeing all the departments. Although you say you're surprised at how big it is, we treat it as a small business. Because we handle everything in-house, we can do that, but the only problem with that is the communication between each team member – it needs to be very clear. One person can fulfil the role of a trend forecaster, visual merchandiser, designer. We have to allow for wiggle room because everything's in-house. Well, the majority of it is in-house.

28:28 I know from the business partner's side it makes sense to outsource as much as possible because…… (21044:21599) - D 28: Participant 17

I know from the business partner's side it makes sense to outsource as much as possible because of the pressure that gets put on that company to deliver, and then less payroll for us. I think in terms of business it makes sense for outsourcing. But I think that the way that the founder of the brand is and runs with the brands, there's more to this than running a business. It's so much more about social politics and all those sorts of stuff, where there's good that can be done by employing people. That is definitely a driving force in this business.

The comments above are from fashion designers who started their fashion-design careers as high-end bespoke/tailoring designers, who aimed to create luxurious lifestyle garments for their consumers. What was revealed from these statements was that these bespoke/tailoring fashion designers had established an in-house production flow. However, as their businesses grew because of increasing demand, the fashion designers ventured into retail.

With growing businesses, the fashion designers outsourced to fashion agents, fashion weeks and training interns (some working in-house) to assist their businesses with production and market access. Moreover, with the growing demand, the fashion designers found the need to outsource their manufacturing whenever the retail orders exceeded specific unit numbers.

The interviews also revealed that the fashion designers that started as bespoke/tailoring fashion designers had established their own showrooms with RTW ranges, which also operated as standalone retail stores in close proximity to their offices and in-house manufacturing.

5.3.1.2. Code 2: Fashion Designers' Capacity

In this code the capacity of South African fashion designers' businesses was considered, taking into account the number of units produced for retail, the styles/designs, and the human skilled resources/resources used to produce for retail.

As observed during the data analysis for code one, the streetwear and leisurewear fashion designers outsourced most of their production, while the high-end designers worked with their own in-house production. The statements below give more in-depth reasons for these choices, as the participants elaborated on their business capacity in terms of what exactly was outsourced and what was kept in-house. The most impressive finding was that the fashion designers interviewed knew their business capacity and would not exert their businesses beyond a specific point, as seen in the quotations below.

> *11:27 I'd say we would probably prefer outsourced. I've spoken to ladies that have run CMTs……. (19547:20267) - D 11: Participant 2*
>
> *I'd say we would still probably prefer outsourced. I've spoken to ladies that have run CMTs. Employing is a whole other bag of worms. It sounds attractive – you'd have a much quicker turnaround – but I don't come from a production background so I would need to employ someone who knows the garment specifications, etc. Unless we started as manufacturers and went on to create our own fashion brand we make for ourselves in-house, that would be fantastic because there's a lot of synergy in there; that would make sense.*
>
> *12: I have 15 people who assist me. (9881:9941) - D 12: Participant 3*
>
> *I have 15 people who assist me in my studio. So, the fabric is outsourced, the printing, some of it is done by hand in-house and some are collaborations with other artists, and others I*

need to outsource because we're using different machinery and equipment. Also treating the fabric in most cases is outsourced. We find that it's better to outsource those components – some of the headaches you must give it to other people and focus. However, you want to have access to a test sample.

14:38 This process right now, we have people we bring in from time-to-time,…… (15697:15900) - D 14: Participant 5

This process right now, we have people we bring in from time to time, we have about 16 people at full-time basis, and then other people come in on short terms to come to assist us when we're in high demand. With our in-house production, it's a question of setting up the systems to say it must be self-sustaining. According to me, I would want it to have fewer people to work with, to have 12 people that are working in this business, and to be able to say that I know that these individuals are great and I know that they can do this. So, more isn't better, because more actually construed a lot of money and time, because the more people you have, the more time you need to manage them.

15:5 What also ends up happening retailers might ask you to tone down something…… (3069:3845) - D 15: Participant 6

We have two options: to either go the CMT route or do our own production in-house. So the determining factor for that is the number of quantities, and of course the resources we have, for example, do we have the sufficient number of employees to produce the items just-in-time, JIT, meaning that the items have to be done at a specific time and can't be out of that frame. My team comprises of on average about eight employees and we often have two or three interns, but now we're going to increase that number. I would like to reduce my overheads and have an in-house PR person I can train because I'm spending a lot of money on external PR and we need to curb that expense.

15:25 Throughout the supply chain, there are about 4-6 individuals who assist me …… (15194:15442) - D 15: Participant 6

Throughout the supply chain, there are about four to six individuals who assist me. This will be my CMT guys; it would be the guys that do my printing; the labels, of course, that's important; I outsource the embroidery specialist also; I outsource the buttons and the zips to people who specialise in that; and I also outsource my PR.

16:31 We outsource fabric, mill, trim – which could be two or three companies – labels… (16804:16960) - D 16: Participant 7

We outsource fabric, mill, trim – which could be two or three companies – labels, zippers, badges, embroidery could be one, printing, CMTs. Then, after that, it's your shipping. If you ship locally then you plan with a truck – the delivery company to go and collect the goods from the factory to deliver it to your stores or your warehouse. Then you split the goods into the different orders, different boxes, and send them accordingly to distribution or retailers. Some of the product is shipped from Mauritius, so then you have to go through customs, but with Mauritius and SA we don't pay any duty because it's part of SADC. Our shippers would go and fetch it either from the factory or at the port, but we normally air our product out, which means it comes by quicker plane, and the price difference is not a lot on items that don't weigh so much. With a product such as denim, you'd rather ship by sea, but with the product such as T-shirts, you'd ship by air. So, it will come to SA and then it goes through customs there and here as well. Customs in both countries would check that your SADC documents are right, that you declared that it's cotton that's made in Africa. So you've got your importer code, they know exactly who you are and they can see if you're sometimes taking chances or not. Then they'll go through your goods and maybe open a box here and there sometimes, sometimes they don't. Then it comes through to your warehouse. They deliver it to your warehouse, and they deliver it to the stores.

22:25 everything is done here, from the studio rooms to cutting everything i…… (17882:18395) - D 22: Participant 11

Everything is done here, from the studio rooms to cutting everything. The students that are on learnership are part of our team. However, we outsource the production fabrics and trimmings. And mostly our styles are very detailed, as much as it can be simple, but they're very detailed. Since we have a school, the number of students increases every single year. We're going to need a bigger space, we want to be one of the best fashion schools located in nice premises, with every equipment that the students need.

28:2 When I started here, we had 16, we're now sitting at 28. So, it's defini…… (2623:2901) - D 28: Participant 17

Four years ago we had sixteen staff members, we're now sitting at twenty-eight. So it's definitely growing. With outsourcing we've got local dye-houses we use, printers, *embroiderers. We also sometimes work with crafters, braiding companies, CMTs, and all our accessories go to a bag manufacturer, shoe manufacturers, and the planner. We are gearing up to bringing the majority of our production in-house because right now I'd say we produce 30% of our styles here and the rest of the 70 are factories around...*

28:24 We're back and working with 7 outsourced CMTs…… (18047:18974) - D 28: Participant 17

We're back and working with seven outsourced CMTs. It changes but we're always looking for more. In-house, we work on sampling and some production. We've got three machinists that work on a sample-set and the other machines are used for production. There's always been in-house production, and as the company has grown outsourcing has happened. But now there's been a shift where we're growing more so we've grown in-house. So that's where we've taken on more staff, as more machinists.

The above comments indicate that South African fashion designers worked with medium to small manufacturers or production facilities, whether they outsourced or produced in-house. Fashion designers who preferred to outsource most of their supply-chain functions identified that they would find it challenging to manage the production and sourcing aspect of their businesses in-house, due to their business capacity and resources. Fashion designers who employed some supply-chain functions within their businesses, such as manufacturing, acknowledged that other supply-chain functions required to be outsourced as they had limited business capacity and resources for functions such as fabric production, fabric sourcing, fabric printing, production of trim and fabric dyeing.

It was evident that the fashion designers interviewed linked their business capacity and product type with the type of retailers to supply. The business arrangements with retailers varied as follows: small-scale standalone stores at prime locations, purchase-order type of relationships, consignment relationships, and retailers purchasing design intellectual property. These outcomes are apparent in the statements below.

11:10 we have done work for a huge international brand and we were talking about doing work with P…… (6145:7032) - D 11: Participant 2

We have done work for a well-known international retail brand and we were talking about doing work with them again. But when we did work for this brand two years ago it actually *cost us so much money. We were doing the artwork in a finished garment but we obviously have to put a certain mark-up on it because it's our time. And when we quoted the brand now two months ago, they said it's too expensive. But we said you're going to a middle man, then you must go straight to a CMT. When we worked with this brand, we didn't keep our brand name. We additionally rent quite a big space with a retail space nationally, and that's great because the tourist buses go in there. The thing is, if you're selling product worth R850, I'd say 80-90% of our business are tourists.*

12:4 Right now, we're working with a high-end department clothing store and the Fashion…… (2814:3849) - D 12: Participant 3

Right now, we're working with a high-end department clothing store and our agent. So our agent pretty much takes our garments and sends them all over the world. I also work with a South African streetwear brand, as a creative director, which is supplying over twenty stores. So currently, with my brand, there are only two stores we're working with. However, it's going to change in the next six months. Because I was not big in retail, as I am a bespoke tailor by nature, and it is very difficult to produce for the masses as it's not my core thing as retail is a completely different ballgame altogether. We currently don't have the capacity for additional retailers, as capacity means employing more people, means getting bigger space, means getting more machines, it means more factories. Currently I'm working in a studio/production, so if I was to produce, let's say, for any of the big retailers, I'll have to expand, and currently we're not in the right place to gear up for that.

14:7 Along the journey we had a beautiful collaboration with a huge high-end, department stores (Hig…… (2872:2996) - D 14: Participant 5

Along the journey we had a beautiful collaboration with a high-end department store, which is what we love doing. From there, our customers knew that if you went to that retailer, you'd find our brand at a high-end price point because the store itself is known for a particular price point and that has been really fantastic. We did that for a number of years. It's been great and now we've gotten to the space of enlarging our retail direction, as we've just signed up with an international retailer. The reception internationally has been fantastic, for the fact that you get people who just walk in and say, "I want that, I want that and I want that." That is fulfilling, and they don't flinch in terms of the price points, they'll just say it's so reasonable and ask for more.

15:8 It varies, because remember when you're in the retail space you're not…… (5299:5417) - D 15: Participant 6

It varies, because remember when you're in the retail space, you're not guaranteed orders; it depends on what they like. So, it varies between four, eight and nine. The past few months the boutiques we've been working with, they buy our intellectual property. I don't do the production for them. They'll buy my sample and I would agree that they can reproduce it at x number of quantities for a certain period and that's it.

16:17 we only supply a few stores internationally (10517:10559) - D 16: Participant 7

We only supply a few stores internationally.

28:5 our prime focus in terms of retail is our retail outlets, for obvious reasons,…… (5683:6129) - D 28: Participant 17

Our prime focus is our retail outlets, which is our biggest input; there are eleven stores around the country. We do also work with an online retailer, which is our second-biggest input. And there are a few independent boutiques that buy from us. How that works is we'll put together a catalogue and send it to them and they'll buy from the catalogue. Our business definitely has the capacity for more retailers, but we're not the kind of brand to say yes to everyone. Generally speaking, the boutiques that approach us have come to us because they know someone. But even then, we won't just say yes, because for us we don't want to saturate the market. Our customers have respect for us because we have a level of exclusivity. But it's also about what area the boutiques are in, e.g. we look at a map and say, this place is here and we've got stores, maybe that could be good for us because it could feed an area. So that's one of the considerations, and I'd say there's maybe about seven or eight independent boutiques that buy our stuff. I think there's only two that we do through consignment. It's not ideal, consignment, with the kind of turnover we need to operate this operation.

In the findings above it is notable that the majority of South African fashion designers interviewed worked with between one and five retailers, while there was one fashion designer who had established a significant retail presence and reputation, and was supplying about twenty retail outlets they owned, together with smaller boutique stores and online retailers. Notably, most of the fashion designers received substantial interest from international retailers, while a few worked only with national retailers.

A few of the fashion designers interviewed confirmed that they were gearing up to opening additional or their own standalone stores at prime locations, as their business capacity allowed. This intention of increasing retail-store capacity is evident in the following quotations.

> *16:14 Our main aim in SA is to have three anchor stores. We're currently on…… (9301:9563) - D 16: Participant 7*
>
> *Our main aim in SA is to have three anchor stores. We currently have four [stores] but none of them are anchor stores. Anchor stores would be like a Sandton City, Oliver Tambo, a V&A Waterfront – the strong retail areas. And then online, to really grow online.*

> *22:16 we want to have our outlets. We are working on getting our place in JH…… (11703:12109) - D 22: Participant 11*
>
> *We want to have our outlets. We are working on getting our place in a prime location in Johannesburg. For now, it's going to be the place in our city centre and here in our studio and showroom. But if there are some other opportunities that came, we will grab them. People particularly don't know our studio and showroom, and it's in a very dangerous location but at least the location of the retailer we supply is in town, in a mall. So we can direct our customers there via social media.*

> *28:7 Our prime focus in terms of retail [10:30] yes…… (6184:7111) - D 28: Participant 17*
>
> *Our prime focus in terms of retail is our sister company, with eleven stores around the country, and there are things in the pipeline for more.*

With regards to units, the recurring factor from the participants was that South African fashion designers preferred to work with minimum quantities. The statements below specify that the leisurewear and streetwear designers worked with larger units than the high-end fashion designers.

> *11:18 we'll have, with any given artist, it will be 4 prints with each artis…… (11928:12593) - D 11: Participant 2*
>
> *We'll have, with any given artist, it will be four prints with each artist. And we've got two new artists ready, and starting with the third artist this year, so that would make it eight to twelve designs/styles. We'll, at any given time now, produce between 500 and 1 000 units at a*

production mill. We were very conservative last year: we made up 1 000 shirts but we pretty much sold out by December. If we had maybe made 2 000 units we could've still sold out. But you only know how much the market can handle if you've made 10 000 and then you've got what's left over. For us, there was definitely a great demand and we've been out of stock now for four, five months.

11:19 I think for us we still keep it small because of cash flow. So, we'll do 1…… (12671:13042) - D 11: Participant 2

I think for us we still keep it small because of cash flow. So we'll do 100 units per prints. So each artist will get about 400 units, which makes it 800 to 1 200. Then we always can just supplement. I would rather be in a position where we are sold out. It's fine if you're sitting with five shirts that no one wants but sitting with 2 000 shirts that no one wants – no thanks!

12:5 20 styles. But we don't send everything to one place, like for instanc…… (4161:4442) - D 12: Participant 3

We design about twenty styles per season but we don't send everything to one place, like, for instance, one province would be more chilled and laid back and the other would be more experimental, so it depends where you're sending the stuff. Currently we're working at very small margins; we're working with fifty units per style ordered.

14:14 Our brand is very much niche, it's very much exclusive, as I don't wan…… (5410:5594) - D 14: Participant 5

Our brand is very much niche, it's very much exclusive, as I don't want to see twenty other people wearing the same thing. I'm happy with three or five, it's fine, and that's what we're focusing on. So we work with very minimal units. We'll then produce five per style. The most fulfilling thing is that we don't have to sell ten blouses to make up a price for one, so now I can sell three instead of selling thirty, and still make better revenue. I get more fulfilled, the client is much happier, I'm not sitting with stock, and I think that's what our brand stands for, and we don't need to mess it up.

14:26 Our collections are quite big, we do at least between 18 and 25 styles…… (9360:9763) - D 14: Participant 5

Our initial collections are quite big. We do at least between eighteen and 25 styles, sometimes 33, depending on the client we're serving. When we did the diffusion line, we *made like forty styles for the collection, and they would buy about 28. Now, for the high-end retailers we're pushing, we'd rather do between twenty and thirty styles, and then the client decides what they would like, in the type of fabrication and coloration.*

14:27 Per style minimal is three and the maximum is five. We realized that we ca…… (9820:10120) - D 14: Participant 5

Per style, minimal is three and the maximum are five. We realised that we can't go beyond that because of the kind of clientele that we service, and also because the people that buy our products usually go to the same events or meetings. The worst thing would be to walk in and everybody has the same blouse. So currently we're supplying one retailer in South Africa, one retailer in Africa and one online store.

15:14 On average it's 12-20 styles, again that's not something you can deter…… (8746:8976) - D 15: Participant 6

On average it's twelve to twenty styles. Again, that's not something you can determine to the buyers, as some buyers will request two or three items and say, let's see if this works or not, then if the demand outstreams the supply, then good for you. So I would say I prefer fifty units going through my supply chain at a time because I know what I'm capable of in terms of delivery and I'd know the minimal selling price of the buyers that approach me. For me, that doesn't only cover my overheads but it puts us at an advantage for positive cash flow. The units also depend on the season: winter we make less but in summer we can take that to about 150 units.

16:22 We do between 60-200 styles depending on the collection. (12323:12378) - D 16: Participant 7

We do between sixty and two hundred styles, depending on the collection. Normally its 500 minimum. We try to do some styles as little as 250/300 per style. But normally not less than 300. But if we could – it depends on your fabric and your combination – then you could get away with 250 or so. But normally it's 300 or 500.

16:24 To determine the number of styles/designs going through your supply chain, we first determine … (12681:13644) - D 16: Participant 7

To determine the number of styles/designs going through your supply chain, we first determine what we can sell through your distribution channels. For instance, in SA in our *stores, we cannot have more than a certain number of bottoms, a certain number of tops, hats, etc.; you cannot have more because the store cannot take more. You've got to plan the drops in the stores. So, for instance, in August you're going to drop these kinds of styles, then in September you're going to drop those, October you're going to drop those. One of our stores, the better stores, which is not is a great area – they're doing very well, but the store is really small. But we can't get a bigger space there. We need at least 120 squares to do justice to the collection. But that store is about 80-90 squares, so it's too small but it's doing very well.*

19:7 I believe that it's about a 10 store, which you're probably looking at about between (3471:3631) - D 19: Participant 10

I believe that it's about ten stores, which you're probably looking at about between fifty and a hundred units across the styles, in those selected stores and then obviously graded as well.

22:19 When it's January, it's after that festive season and everything goes…… (13550:13752) - D 22: Participant 11

When it's January, it's after that festive season and everything goes down. In order for us not to sit and do nothing, while putting the guys on a short-term contract, we'd rather just take small amounts like thirty, forty, fifty, sixty, a hundred. If you're looking for a nice traditional shirt, we can make at least up to one hundred. Not thousands; it would mess up the price. However, in an outlet, because it's more of a showroom/boutique, we would need more elaborate designs. We could then up the number of styles. But per style, we don't want to do big volumes. So we'd prefer a hundred units per week, depending on how complicated the styles are.

28:8 So core is less but the quantities are higher and the newness is more…… (7301:7984) - D 28: Participant 17

So the core is less but the quantities are higher, and the newness is more in terms of styles but the quantities are less. But the newness needs to obviously be there to evolve the core. In a season anything from twenty or thirty styles in newness and I'd say maybe about ten in core. With our cores we've got categories, so tops, bottoms, dresses, whatever. I'd say about ten, men's and women's. On our core pieces, we'll manufacture 300/350 per colour, per style, and that will go into the bank that will feed the online retailer and our retail outlets.

But if we're wanting to put a full cut of one colour into our retail store, we'll do about 110-120 units.

28:22 Like I was saying bringing in 1,500 metres, that's our minimum for a…… (17141:17544) - D 28: Participant 17

Like I was saying, bringing in 1 500 metres, that's our minimum for a specific fabric in our colour. With the in-house production, the ideal would be to produce 2 000 units a month but I don't think it comes out like that.

Evidently, South African fashion designers worked with between fifty and five-hundred units per style, dependent on the product type. The styles per product range extended between eight and thirty styles. Notably, the lower the quantities, the more styles the fashion designers would produce.

The South African fashion designers interviewed preferred to work with smaller units, concentrating more on the quality and details of their designer ranges.

5.3.1.3. Code 3: Retailers Business Structures and Capacity

It was found that the different clothing retailers worked very differently with South African fashion designers, as observed in the statements below.

32:58 we intergrade fashion designers into our employment or we help them or we help them…… (8077:8496) - D 32: Participant 1

We integrate fashion designers into our employment or help them along their fashion-design journey in retail or we help them set up their own business…

15:15 Every retailer and every boutique has got a different business model t…… (8977:9503) - D 15: Participant 6

Every retailer and every boutique has got a different business model that they would run with. Some will say, let us go into consignment, to put themselves behind the safety net instead of overfilling their floors with items they're not sure if they're going to fly off the rails, so they'd rather put the risk on the designer, and what's going to happen is in a few weeks *those items will be sent back to you, then the designer has to decide to either replenish or decide not to work with that particular retailer any more.*

19:3 we have some freelance designers that get supply us, yes. In our department, we'll…… (1735:2110) - D 19: Participant 10

We have some freelance designers that we work with. In our department we'll use a freelance graphic designer and a freelance fashion designer that will help us with tech packs. And the same thing for other departments.

19:20 The creative process is completely left up to the designers. Their range is their range …… (17875:19247) - D 19: Participant 10

The creative process is completely left up to the designers. What they're showing is going to be put into stores. There's no creative influence from our perspective. The only thing is we'll purchase what we believe will sell. But when it comes to managing the designers, it would really be the money side of the business, which is from planning. The designers would also usually get called in and they would go through a fit session with quality people, to ensure that they produce the right sizes.

23:16 Most of the retailers don't buy designers' products, even the large independent multiple retailers, don't buy the clothes. [1…… (11540:11846) - D 23: Participant 12

Most of the retailers don't buy designers' products. Even the large independent multiple retailers don't buy the clothes. There was one boutique, they were not buying the clothes, and if they were not selling, they'll tell you to come and take your clothing.

31:3 We provide a platform for designer brands in SA that wanted to do their o…… (2452:2741) - D 31: Participant 23

We provide a platform for designer brands in SA that want to do their own thing and have a shared space to sell from. The negotiating, the lease, was all taken care of from our side, so that young designers could have a rail and focus on their business. They can start small with us and then grow. The designers just need to fill the rails. Everything is done completely on consignment. We don't buy the product; it belongs to the designer. They have to run their business: they have to decide what they're putting in, follow up with what's sold.

The identified clothing retailers that worked with South African fashion designers were either huge international department stores, which bought local fashion designers' product or hired local fashion designers as freelancers; large national multiple retailers, which worked with designers on a consignment basis; single independent retailers known as boutiques, which also worked with local fashion designers on consignment or bought the fashion designers' intellectual property for particular designs; or online retailers, which bought local fashion designers' product.

When working with South African fashion designers, it was found that besides the different taxonomy of retailers, the retailers had different individuals or divisions internally or externally, which assisted them in procuring, communicating and managing the fashion designer they worked with. This is evident in the comments below.

32:59 Usually the buyers and merchandisers will come in and say this is…… (14359:14619) - D 32: Participant 1

Usually, the buyers and merchandisers will come in and say, this is what we want, or they'll request different samples of what they want from local fashion designers. We've done that more with manufacturers, but we are still exploring the best practices when working with designers.

19:13 the business relationship with designers is dealt with by the planners. The only part…… (8765:10099) - D 19: Participant 10

The business relationship with designers is dealt with by the planners. The only part that the designer really plays a role is in selections. So there'll be a team of people that go to the fashion shows and do selections. The product then comes down to the design teams, and then it gets workshopped into what could then potentially become a part of the range and sold to our customer. From there the planners will then take over in terms of what that production retailed for, how many units they need to buy, what is the delivery deadlines, and put the steps in place for that. We've said no to products we have had to cut out.

24:15 We've worked with a consultant that developed particular steps to retail, which was very brilliantly done……. (15947:16481) - D 24: Participant 13

We've worked with a consultant that developed particular steps to retail, which was very brilliantly done. This is a pipeline of work that took a designer from inspiration to mood board to patternmaking to CMT to a showcasing. The designers would've designed their ranges *themselves: they would've been in the developing space of the actual range, they would've been mentored, and then they would actually show a range to a panel, which would then be considered for retail.*

31:30 We have offered free planning to certain designers along the way. E…… (6918:7272) - D 31: Participant 23

We have offered free planning to certain designers along the way. Even designers who've been with us for a long time and then suddenly their sales dip, we do that [from] time to time. Someone who is committed and doesn't understand why, we give them a month or two free planning either to get them back on track or get them to see the value of the planning.

31:23 The management of the designers in-store is…… (11089:11241) - D 31: Participant 23

The management of the designers in-store is all in-house, with the exception of the planning, which is outsourced.

From the above statements, it is evident that the predominant department that was found to procure, communicate and manage fashion designers in retail was the existing retail buying and planning or merchandising departments. A lower fraction of retailers were identified as making use of external retail planning consultants, local trend analysts and retail business consultants that specialised in local design.

A number of retailers had evidently started to grow their local supply and production footprint over more recent years. Nevertheless, with that growth, the visibility of local fashion designers in retail, together with local fabric production, was still marginal, which requires greater interventions. This can be observed in the statements below.

32:4 In 2015 our local content was 28%, we're currently at 53%, so there is…… (1167:1315) - D 32: Participant 1

In 2015 our local content was 28%. We're currently at 53%, so there is a huge component that we are manufacturing locally and people don't know that. We have an SA-based CMTs we use; it is a huge CMT which manufactures for huge retailers. We also have a shoe-manufacturing plant.

32:8 But we've gone beyond that and said, how do we cover the whole value c…… (1634:2233) - D 32: Participant 1

But we've gone beyond that and said, how do we cover the whole value chain from farm to shelf? So we've started embarking on a project called the cotton cluster, utilised by a number of retailers. But we've gone really big in focusing on that. So if you look at a number of our T-shirts, they're actually manufactured from the cotton from Marblehall in Polokwane to our shelves, as well as some of the khaki shorts you'll see from our shelves, they're also from cotton. So we're embarking on ensuring that we manage the entire supply chain and not rely on cotton from other countries, for example. We're also going to start working with the farmers to ensure that they're going to deliver what we need so that the whole value chain can be from South Africa.

19:4 We're shifting towards more of a design-focused organi…… (2172:2809) - D 19: Participant 10

We collaborate with fashion production platforms and then we'll offer some store space for some of the local designers. It is about six local designers that we've worked with in the men's department alone, and it could be more local designers in other departments. We're shifting towards more of a design-focused organisation. It's important to have the right people in place to be able to create that work. The organisation is creating a structure to get us to move into the future where we compete on a global scale but I do think there are still opportunities to grow.

28:36 Our retail outlet has 11 stores countrywide and more coming…. (22153:22213) - D 28: Participant 17

Our retail outlet has eleven stores countrywide and more coming.

21:1 The retailer's I work with are at least over 56% local producti…… (1434:1780) - D 21: Participant 21

The retailers I work with are at least over 56% local production now, using the fast-fashion model. [The] fast-fashion model was a nice way of competing against price, and what's also nice about it is that retailers can control where the factories are, and that's where sustainability is.

With the growth of local production and supplier procurement, the retailers and retail agents that assisted fashion designers with access to market indicated that though the model required fine-tuning, there was still capacity and opportunity for additional fashion designers to work with them. That is evaluated in the comments that follow.

32:15 The plan is to see our projects (bringing in additional South African fashion designers) rolled out throughout the country by 2…… (4959:5107) - D 32: Participant 1

The plan is to see our projects [bringing in additional South African fashion designers] rolled out throughout the country by 2021, but now it's currently running in three provinces, Gauteng, Cape Town and KZN.

21:16 I've got the capacity to work with additional designers but I'd rather see how this works. I can…… (7544:7712) - D 21: Participant 21

I've got the capacity to work with additional designers but I'd rather see how the current designers work, and then I can go back to the DTI and say, we've got a formula that works rather than it's a nice idea and etc.

33:2 We work with about six or seven fashion designers. And outside the ones that are on retainer, we've d…… (2151:2401) - D 33: Participant 22

We work with about six or seven fashion designers, and outside the ones that are on retainer we've done probably special projects which would encompass seasonal planning rather than monthly forecasting. We've worked with other fashion designers, assisting them with their monthly forecasting, so, for that, we probably worked with about ten to twelve.

31:6 We work with more than 30 fashion designers that are in stores at the moment. (3534:3588) - D 31: Participant 23

We work with more than thirty fashion designers at the moment. I'm also working with designers that are getting ready for retail. We have four that I've stationed with us, that are ready. They have already done fashion shows and already have a market. But we also have about 34 that are still in training and working towards it. We have the capacity for more; and also, if the designers fall away or are not working, we'll need additional designers. We don't control the design so we can't control whether they survive or not. So that changes. Yes, there is space.

5.3.2. Objective 2: Processes and Timelines of the Supply-Chain-Management Model for South African Fashion Designers in the Retail Environment

Figure 5.2. illustrates the code group that determined the processes and echelons required in the supply-chain-management model for South African fashion designers in the retail environment. This was achieved by, first, evaluating the lead times and timelines South African fashion designers worked with when managing the supply-chain model for the retail clothing industry, to better understand the supply-chain-model flow. The four areas of support South African fashion designers received were assessed, this was done to determine the steps and channels local designers used to reach the retail clothing environment on time.

As a result, code four was assigned to lead times and timelines, while code five was allocated to the supply-chain-management support South African fashion designers received from stakeholders including educational institutions, government institutions, fashion councils, retailers and retail agents, and other fashion designers. Therefore a total of two codes emerged from this code group, with code five divided into four sub-codes. Figure 5.2. (below) illustrates the relationships of the codes and explains the four sub-codes that are associated with one another.

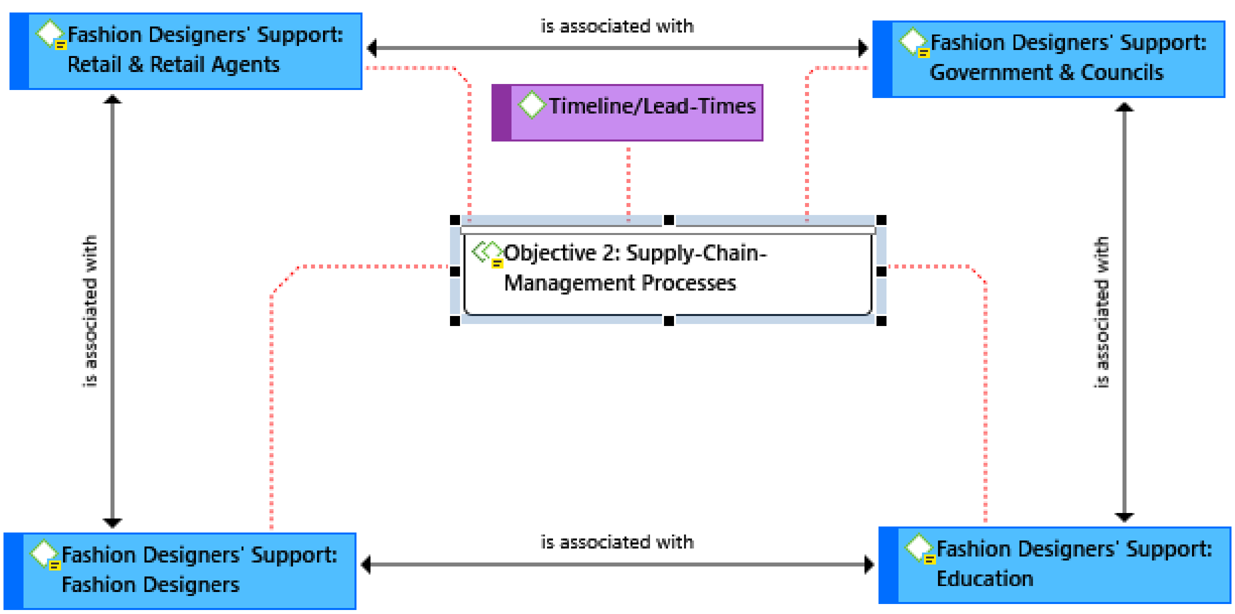


Figure 5.2: Objective 2 - Code Group 2

5.3.2.1. Code Four: Timelines of the Supply-Chain-Management-Model Process

With this code, the timelines and the processes of South African fashion designers producing for retail were taken into account. Bearing in mind that different garments required different time frames, it was found that the supply-chain-management process for retail clothing took South African fashion designers between two and ten months, for complete range preparation and complete production. This two to ten months took into consideration fabric supply and printing. Once the fabric was available, it was found that it took South African fashion designers one to six weeks to manufacture the garments, add the finishing and ensure that all quality control was completed.

During the interview proceedings, it was also discovered that some participants started their planning between fourteen and eighteen months prior to the product reaching retail stores. That can be seen in the following quotations.

> *32:41 It doesn't take long; I think it also depends on the timelines of when…… (22139:22677) - D 32: Participant 1*
>
> *It doesn't take long; I think it also depends on the timelines of when we want to launch the product line. For example, we could say it needs to be two months for it to be up and running. And obviously we support them at the back-end as well. What we picked up with the designers is that the quality-assurance process is shorter, because we know you're a brand and certain things may be done a certain way – as long as the quality is right and the size curves are right, that's not a big issue – while for others the lead times are longer.*
>
> *11:22 that whole process could take about 4-6 months from original artwork……. (16325:16665) - D 11: Participant 2*
>
> *That whole process could take about four to six months from original artwork. But once the artwork is in, it could take a month for printing and a month for CMT. The artwork is the long part because we're testing/sampling. But if we come now with an order, we tell our clients twelve weeks because it just gives us a four-week buffer in case things go wrong.*
>
> *12:16 it takes us 2-3 months it depends, what goes into the design. For exam…… (9484:9784) - D 12: Participant 3*
>
> *It takes us two to three months; it depends what goes into the design. For example, a white shirt is just a white shirt. If you have white fabric, it goes, but sometimes you have a white*

shirt and you'll need to treat the fabric, test it, because it's the first time we use it, so we don't have a standard time.

14:25 and the turn-around time we always say 6 weeks from order, when we rec…… (9033:9144) - D 14: Participant 5

And the turnaround time, we always say six weeks from order, when we receive payment until it reaches the store.

15:23 So I would say a good turn-around is 2-3 months. While each process is…… (14431:14789) - D 15: Participant 6

So I would say a good turnaround is two to three months. While each process isn't static, but very dynamic, of course you've got to have a project plan, but it's a very dynamic process because things come and things get sent back, things have to be revisited, certain fabrics don't work, then the whole project doesn't work, then you'll have to start it from scratch.

16:2 So, it's almost a little bit more than 6-9 months in advance…… (689:1379) - D 16: Participant 7

So it's almost a little bit more than six to nine months in advance. In SA it's similar, where the season is just the other way around. So you plan your fabric. First of all, your fabric has got to be ready, your fabric has got to be made, which normally takes about four to six weeks. It depends where you're getting it from, sometimes you still got to ship the fabric. Say the manufacturing of the actual garment after the fabric takes also about four to six weeks, then it's your finishing. Your finishing should be quick, and your quality control.

16:9 Our fabric is not the normal fabric that everybody uses, so they…… (5603:6608) - D 16: Participant 7

Our fabric is not the normal fabric that everybody uses, so they have to make it especially for us, our specifications. So we cut about maybe four or five weeks out of that process. Because the process was much longer than four to six weeks, it was almost two months that it would've taken.

19:15 So with different garments there will be different times, some of…… (10833:14245) - D 19: Participant 10

So with different garments there will be different times. Some of them are a lot faster than others. Different countries need different time frames as well. From a time frame perspective we start production… Shipping, negotiations are within that time frame of eight months to stores but when the designers actually present their design brief, they're about ten months away from being launched in stores.

22:22 the only thing that delays is getting fabrics. We can sit down, design…… (15926:16218) - D 22: Participant 11

The only thing that delays [us] is getting fabrics. We can sit down, design everything, pattern, but the fabric will be the problem. Once you go to the millers/suppliers, they'll say they only have twenty metres so they would need to order, and that will take about two weeks. That's where the delay starts.

22:24 to do the shirt it takes us a week. Once the work is cut, sitting on t…… (17506:17757) - D 22: Participant 11

To do the shirt it takes us a week. Once the work is cut, sitting on the machine is not a problem, construction is not a problem. It's all the other logistics that are a problem. It's two to three weeks if everything is here.

28:4 We do have a timeline. We know if we have to meet t…… (3290:4920) - D 28: Participant 17

We show at fashion weeks about six months before the retail season. So, for instance, when we just showed spring/summer in April, now that will be launched September – so it's about six months. And that starts from the concept phase. Now when that's finished, we'll then look at the garments and decide what will work in the store, and then we'll make up our art drops and packs, and what's going to go in stores so we can spread it out a bit. Not everything goes in at once, because we wouldn't be able to handle that. But with the menswear we'll figure out exactly what we want to put in the store. That's designed, sampled and from there that informs decisions of what goes into the show. They work together; they work on the same timeline to get to retail but in terms of making the show, it's a different spot. I suppose if you look at one season in isolation it's about six to eight months – six *months from concept to store, and those two months working on marketing and visual merchandising.*

The statements above specify that the research and preparation phases needed to be concluded months in advance before the designer ranges were scheduled for retail. Once the research and preparation phases were concluded, the fabric planning was detailed as one of the most intricate processes that required a significantly longer time frame than the garment-production process and the actual designing process. The fabric-planning process involved different components for different designers, which could be the designing of fabric artwork or prints, the printing of artwork or prints, fabric dyeing, fabric sourcing or buying, fabric production, or the buying or sourcing of finishings and trims.

It was clear from the responses that the supply-chain-management process for retail differed for each participant, while the timelines usually overlapped between seasons. The processes that determined the time frames of the supply-chain-management process included the abovementioned processes such as research (attending national and international shows), fabric planning, the designing process (prints or full garments), and the garment production or manufacturing process.

Other processes, mentioned in the statements from participants, included sampling (prints and/or full garment), marketing or showcasing at fashion shows, and the transportation processes.

11:8 because we work with artists, we will put together a design brief, hav…… (4941:5633) - D 11: Participant 2

Because we work with artists, we will put together a design brief, have a meeting with an artist, they'll put together mood boards, we'll show them the direction we're going in, then pick the designs – at this stage we're doing two designs, two colourways. We then pay them outright for their artwork, send that fabric to get printed, do a couple of test print metres, globe-freight that down to our studio, check for scale and colour, then approve, then go into bulk printing, then start bulk production. Then it goes into our stock, into stores, into the warehouse, online sales, markets. We've got a production schedule and it does help. It's often moving and we're at the moment going to be re-plugging-in dates. But it will be fabric ordering, fabric arriving from printers, production stocks, etc. I must admit that in terms of our supply chain, it's pretty straightforward. The only thing for us is that printing is too expensive. Then ultimately it just comes down to, for us, it's quality of manufacturing.

12:3 the first thing is the product and then we'll look at the targeted pri…… (1266:2595) - D 12: Participant 3

The first thing is the product and then we'll look at the targeted price, because some retailers will tell you to indicate how much your product needs to retail for, then you know your price should be a certain amount so that you make a decent profit within the percentages. You then start working backward, on deciding the type of material you're going to use, how much detail and at what price, so that you stick to your margins. Working backward, we'll decide whether we're going to use 100% cotton or if we're going to mix it up. We'll then take a look at what we are going to use for print – full print, half, embroidery. Every little detail counts, the buttons, the lining, etc. This is all determined by the price the retailer gives you – with whatever price determined for retail, we make sure we get 50% of whatever cost we put into the garment, in order to make a decent profit. It is not only about creating an amazing garment; it all comes back to the profits and making business sense.

14:19 We start firstly with the design process; we then do a samp…… (7400:7659) - D 14: Participant 5

We start firstly with the design process. We then do a sample. We like to then do a collection and we present it, showcase to clients, then the client selects the styles they want from the collection, then they place orders of twos, threes or fives.

15:4 We showcase at fashion week platforms if we're lucky there we are app…… (2489:3068) - D 15: Participant 6

We showcase at fashion-week platforms. If we're lucky, there we are approached by retail, and [by] retail I'm not necessarily talking about the big giant retail stores, it could be a boutique with maybe three or four branches. However, you would be approached based on what the potential buyer sees, and because they understand the market, they're the ones that will request certain looks or items you've done, so it's very difficult to approach them and say, this is what I've done, because half of the time you wouldn't understand their market; they'll understand it better than you do. So if you get your timelines to overlap, that's going to have an adverse impact on your next project, so we usually try to stay within those time frames, so that you don't find yourself overwhelmed.

28:1 What we'll do at the beginning of the season is there'll be researching that … (302:2520) - D 28: Participant 17

What we'll do at the beginning of the season is there'll be research that goes into it, and then a proposal is put forward in terms of what trends we should catch on to, what colours we're doing, etc., and that's proposed to the head designer. They'll then make tweaks if necessary, and then we go through to designing.

 # we're jumping back to February 2019 which is where we had the Trade Sh…… - D: Participant #

Going back to February 2019, which is when we attended the trade show, and that would be a starting point for the business to understand where the fabric trends are going. The second step would then be in June, which would be the additional trade shows, so we're be looking into the fabric for garments. So from February to June we would be looking at the garments, and there would be a trade show, and this is where brands are showing and selling their garments for the next season. For the northern-hemisphere brands we'll be looking at their summer but thinking about our summer, which will be a year away because of the season. There's obviously an opportunity to take some of that information and update and influence our current summer, so it does give us an opportunity to test and trial these things in season. So that will be June. From June we move into the designer-show season for menswear, which will be around July/August. At that time, we are doing research on the shifting silhouettes, its colours, the garments, the looks. Combining that information with the trade-shows information, and then we package it into a trend document which we will present at the end of August. This document will be the first time that the designers will take over the reins, so all this information was put together by the trend team and head of design. Now that information goes to the designers and they have to start taking that information and filtering through. The designers will start their work for August, which is a year away from when they launch that season for summer. Once the information has been presented end of October, it is then signed off. We go into the workshops, where we meet with the planners and buyers, and everyone as a team puts that concept into a range that is balanced, makes sense, flows for the customer. That offers newness every month, but also brings in big statements. That would be signed off at the beginning of December. So that is December, and again I mention that we launch it in stores at the end of August. So that's nine months away. For SA independent designers, I would recommend the process to be simplified but following a similar flow. One of the tricky things is looking at fabrication and *making sure you bought enough fabrics that you are able to turn on and move on. Does your supplier own the fabric or do you own it and give it to your supplier? It's trying to manage that from a costing perspective. Talking to young designers, that's probably the thing they need to spend the cost time on – costing, negotiating, planning fabrics for production.*

Additionally, it was found that most participants were satisfied with their timelines, taking into consideration the amount of fabric readily available in South Africa, production schedules of manufacturers, and the long distances that had to be covered to access the resources required.

Other participants realised the need for timeous planning and research, thus desired for the supply-chain-management process to commence much earlier than their current timeline, as mentioned in the quotations below.

11:23 I would like it to be shorter but our printers are in another province so it doe…… (16719:17414) - D 11: Participant 2

I would like it to be shorter but our printers are in another province so it does take about two or three months. You've got to slip into manufacturers' or printers' production schedule. For four weeks on the line for 100/200 garments, that's fine, so, the twelve weeks in total with a four-week buffer is absolutely fine.

16:33 I don't think you can get it faster anywhere in the world. Zara is the guys that…… (18050:18592) - D 16: Participant 7

I don't think you can get it faster anywhere in the world. Zara [are] the guys that blow their own trumpet, saying they're fastest, but it depends if they know their game and the fabrics they're playing with. Zara cannot in two weeks make fabric and produce a garment. They have their fabrics ready, their normal core fabrics they deal with, and then they can, of course, cut quickly and sew [and] so on. But in general I don't think you can get away with less than two months.

19:15 Working with only local suppliers would be quicker…… (10833:14245) - D 19: Participant 10

Working with only local suppliers would be much quicker.

22:24 Our current timeline is what we prefer …… (17506:17757) - D 22: Participant 11

Our current timeline is what we prefer.

28:22 It could be really nice if we could conceptualise the colour of a collection well in advance and …… (17141:17544) - D 28: Participant 17

It could be really nice if we could conceptualise the colour of a collection well in advance, and this means that by the time it gets to store, the story is so on-point, precise and considered. That means any meeting with any fabric supplier, we can just make better decisions if we start well in advance. Like I was saying, bringing in 1 500 metres, that's our minimum for a specific fabric in our colour.

To guarantee sufficient turnover time from products designed for the retail clothing environment, South African fashion designers first considered appropriate costing and mark-up strategies when managing the supply-chain process. Second, market-segmentation strategies were considered before they commenced with the design process. Third, participants found it necessary that they produced locally and that they remained agile within the supply-chain-management network to remain efficient. And, last, the correct and supporting design documents such as mood boards, colour boards, fabric boards, costing sheets, points-of-measure sheets and specification sheets (referred to as technical packs) were the primary documentation required when communicating product requirements throughout the supply-chain-management process. These findings can be evaluated in the statements below.

12:2 The first thing that comes to mind is cost; the second thing is sizes.…… (882:1198) - D 12: Participant 3

The first thing that comes to mind is cost; the second thing is sizes. When you're working with South Africa, you use standard South African measurements, and when you're working with Europe, you use European sizes. We look at usability and the fabrics as well. We also ensure that everything is produced in South Africa.

12:3 For us if we're not making a certain percentage then we're not doing it, but this…… (1266:2595) - D 12: Participant 3

For us, if we're not making a certain percentage, then we're not doing it, but this is the standard procedure of operations for our organisation, we work with, not written down. Because out of that 100% profit, about 70% goes towards the business and 30% elsewhere.

14:23 Our strategy, supporting our structure is we're flexible, but the core…… (8506:8727) - D 14: Participant 5

Our strategy, supporting our structure, is we're flexible but the core of the business is, we do the collection, we do our line sheets, we do our selling boards, we do the sales, and from there we manufacture and deliver.

15:12 I prefer what makes business sense and what makes money for me and it…… (7870:8284) - D 15: Participant 6

I prefer what makes business sense and what makes money for me, and it all depends. I will look at the proposal, and try deciphering if it makes not only business sense, but is there good revenue that's coming, because the revenue stream is very important, and if I can reduce my overheads. Remember, in business the idea is to look at your cash flow – the more in-flow you have and the less out-flow you have, it's a bonus.

19:15 Designers are then required to create and develop new techpacks and meet with…… (10833:14245) - D 19: Participant 10

Designers are then required to create and develop new tech packs and meet with suppliers, looking at the fabrics from the trends, getting things developed. They are creating colour boards, fabric boards and looking at mood boards.

It was found that most participants did not fully document their supply-chain-management processes, as some participants found it too basic to write down. Other participants preferred to only track certain areas of the supply-chain-management process with follow-up documentation, once production had commenced, as noted in the statements below.

15:7 It is part of your brand DNA, it's engraved, it's a best practice, you…… (4451:5086) - D 15: Participant 6

It is part of your brand DNA, it's engraved, it's a best practice – you have to know when to implement it and to teach your people how to execute that. I find writing it down is more like having A, B, C written down. What do you make out of the letters? Out of the letters you come up with a sentence, out of the sentence you come out with a paragraph, out of the paragraph you come out with a complete page, out of the complete page you come out with a book or newspaper article. So you just simply look at what you can do with the letters A, B, C. They're the foundation, but they don't necessarily mean they'll produce the end result.

16:9 with every production we have a follow up system so you check your pro…… (5603:6608) - D 16: Participant 7

With every production, we have a follow-up system, so you check your production process. You check where the factories are if they're running late, and you can see where you can make up. For instance, we have a late fabric from Madagascar that we're going to manufacture in Mauritius and headed for distribution in America. The shipping was going to take three weeks, so that's an extra three weeks that it adds. So sometimes you can adjust your production programme to fit your delivery.

28:4 In terms of structure we have a timeline. We know if we have to meet t…… (3290:4920) - D 28: Participant 17

In terms of process, we have a written timeline. We know if we have to meet the deadline for the retail season, we work our way back from there. I would say we work on about six to ten weeks for production.

5.3.2.2. Code Five: Stakeholders' Support for South African Fashion Designers' Supply-Chain-Management Process

The interviews confirmed that South African fashion designers did not work in isolation with the management of the supply-chain-model processes for the retail clothing environment. Though South African fashion designers were responsible as suppliers to ensure on-time delivery to retailers, support at various levels of the echelons was found to be crucial. Consequently, South African fashion designers in the retail clothing environment received support from educational institutions, government institutions, fashion councils, retailers, retail agents, and other fashion designers.

Therefore, code five explored and described the support South African fashion designers received from stakeholders by dividing the code into four categories. The first category discussed the support from educational institutions, the second category deliberated the support from government institutions and fashion councils, the third category evaluated the support from retailers and retail agents or consultants, while the final category looked at the support from other South African fashion designers.

Code 5.1. Support from Educational Institutions

Fashion education offered South African fashion designers the initial contact, preparation, knowledge and skills for the retail industry, as it ensured communication channels remained ongoing with retailers to develop more relevant curricula, which accommodated supply-chain-management processes for retail needs. While there are basic-education institutions, further education in the form of incubators was found to be some of the supporting structures for the supply-chain-management processes of young (or new) local fashion designers in the retail industry. The statements below elaborate on this.

> *18:3 One way we support our graduates is to have relationships with retailers. Certain retailers ar…… (1620:2052) - D 18: Participant 9*
>
> *One way we support our graduates is to have relationships with retailers. Certain retailers are more open to, and we can work more closely with their HR department to understand their needs. So there's a constant conversation between us and the retailers to understand exactly what we should be teaching and how we should be doing it. And then obviously I think the business courses that we do prepare the students for an understanding of the environment.*

> *25:8 I had a model from the research for a collection, to the distribution…… (9105:9740) - D 25: Participant 14*
>
> *I had a model from the research of a collection to the distribution of the collection, and that's what I train designers to do, and I teach each week. Each day I meet them it's a different module. It includes everything: it's communication, costing, quality control, rejects, fabrications, it's all those things. It's taking the compartments as if they were in a factory putting a collection together. This is quite an evolved model. It starts with research on the collection, storyboard, mood board, fabric board, trimmings board, communication, building the collection, patterns, making the prototypes, making the duplicates, doing the catalogue, doing the price list, costing the garments, doing the QA report, doing the body specs, going out to a conference, planning the conference, selling the collection, then doing the follow-up.*

> *26:5 In an incubator like this that is where say skills development. Which…… (4004:5390) - D 26: Participant 15*
>
> *In an incubator like this, we offer skills development, which means it involves the accredited skills programme. This is a qualification that has 120 credits, therefore it's a national*

qualification in clothing-manufacturing processes. The students learn about the industry, materials and the core. The elective programmes include the functions and the understanding of the sewing machine and how it works. And also they learn about productivity, like, how many garments can you produce in an hour if you're doing an operation? The incubation starts when the designers are working on a product – product development. They are developing the product so that we can see exactly where the flaws are, how best they can improve, how can we match this style with the kind of fabric that they are using. They learn that during the incubation phase. They then start retail readiness once they move into retail and start interacting with clients. We have approached a national independent retailer to please provide an outlet for the designs, because then the designers would have a set outlet to produce for.

26:9 Our designer don't really have to be sitting down doing the work……. (6891:8209) - D 26: Participant 15

Our designers don't have to sit down and do all the work on the machine. So what we do is we have different stages where they are creating. But they have to understand the whole process because if they do not know/understand the process, they cannot succeed with their businesses. But they own the business, which means they take care of their customers and they take care of the creating of the art part of it. But then with pattern making, we've got people who are being trained to make patterns so they work with the designer. The designers bring their design drawing and inspiration, then the pattern is done. There are people who are being trained here for different responsibilities within the supply chain, because we don't want to focus only on the designer, we also focus on the people who can sit and be seamstresses. We are even looking at the technology, as the machines have to be more technology orientated. At the end of it all, we have a group of people, so that the designer doesn't really have to sit on the machine, but maybe they can just sit to do their own samples. But once it's done, it has to be given to the seamstresses. This is all a set structure and we have a proper business plan. Even the designers, in terms of the processes, they have to understand the processes.

29:1 Basically a lot of the coaching and mentoring I've done on my own/with…… (1424:2138) - D 29: Participant 18

Basically, a lot of the coaching and mentoring I've done has been to assist designers to get into retail. I've worked with a programme for retail readiness and I was specialising in *design, so, the principles and foundation of design aesthetics, applied design, the technical stuff I didn't quite get into, but I would do the quality… It was a number of sessions, so I would do the first six, then somebody would take over and so forth. Because I've worked with an incubator and the fashion council, I had to use a framework that I had designed for what should work/what it is ideal for a designer to get into retail.*

Most educational institutions interviewed had created generalised critical paths for fashion designers in the retail environment, which provided an overview of the supply-chain-management process. Fashion education additionally assumed the role of personal support for South African fashion designers, through mentorship and character-development programmes to ensure readiness for the retail industry.

Code 5.2. Support from Government Institutions and Fashion Councils

The support from government institutions and fashion councils (funded by government institutions) was targeted more at funding South African fashion designers for marketing efforts and market access. The quotations below provide a more detailed account of the support fashion councils and government institutions offered South African fashion designers.

13:1 Firstly, what we were doing we were looking more at the development and the promotion,…… (835:1097) - D 13: Participant 4

Firstly, what we were doing, we were looking more at the development and the promotion, meaning we would work with grassroots designers, and helping them develop from that level so that they can get to a certain level. Then, once they get there, we give them opportunities like showcasing around the world. We have South African embassies around the world, and every year they have South Africa Day, where designers and other artists showcase anything that has to do with South Africa. The embassies invite the fashion designers from that angle that they'll be showcasing what we have in the country in terms of the cultural and the creative concepts. We also have cultural seasons that happen around the world; we also send the designers there to showcase, and that's the part of promotion.

24:15 The programme we created for designers to reach retail was actually very, very……. (15947:16481) - D 24: Participant 13

The programme we created for designers to reach retail was actually very, very brilliantly done. This was what we term as the pipeline of work that took a designer from inspiration to mood board to patternmaking to CMT to a showcase, to developing a twelve-look range *for runway. So the designers would present their ranges to us – by then they would've developed their ranges, they would've been in the developing space of the actual range, and they would've been mentored during that three-week period.*

27:1 Our mandate is to empower designers within our space. We are funded…… (498:2380) - D 27: Participant 16

Our mandate is to empower designers within our space. We are funded by the Department of Economic Development and we were also at one time funded by the municipality. What we basically do, we train designers. We first try to understand what their needs are and then we try to give them training on those needs: training, facilitation, mentoring, coaching, incubation, all those developmental initiatives, we do that. But we also look at assisting them to identify opportunities in accessing funding, as well as accessing different markets. So we fund them to go to different fashion shows to showcase their stuff and different exhibitions, we do those funding. Then we also try to link them with different retail spaces so they can showcase their designs. What we also do, which is our flagship programme, where we do a mini fashion week, but we do exhibitions as well. So it's a three-day event. We have exhibitions for the whole three days where they exhibit their clothing. With this programme, we want to do everything that we offer on those three days. So we've got masterclasses where we do training and the facilitation. But we also have exhibitions where we link them with markets, the markets come to them to see what they sell. What we also do, we have fashion shows so the people then can just see the fashion designs and the likes. We invite buyers, we invite different stakeholders, the communities, to come and see. So that's where we put all our efforts. We don't work with a large number of fashion designers in retail, it would be like just under a hundred, because most of them go through the route of pop-ups, so it's not permanent, because of the rent and all those other things. We've got a couple in the northern area, and then others at the national independent retailer, and then in one of the larger malls; I think there's one or two who are doing their own thing. So it's not a lot of them. And throughout this province, we've got them sprinkled. They all want to have their own retail space but it is so expensive.

27:9 We have CMTs we have spoken to and they are willing to work…… (6821:7439) - D 27: Participant 16

We have CMTs we have spoken to and they are willing to work with fashion designers if they have us and know that they're only dealing with one person. They're also willing if we *give them consistent orders. Most of them have spoken to these factories on their own but because of the little orders and very low units, we would then be the in-between that negotiates with factories on behalf of designers. So we assist with just giving fashion designers that support, maybe just helping them with aspects where they are lacking.*

30:22 Currently we have what we call an industrial economic hub, they were a…… (24831:25051) - D 30: Participant 19

Currently we have what we call an industrial economic hub – they were all set within the districts. With that being in place, you've got [a] clothing and textile hub that's going to be happening. Skilling is part of what we do, as well as the department – we go out there, we get organisations to help us teach our communities or business entities we engage with, the SMMEs.

30:37 there's a flagship program that we do within the Fashion Council which…… (37118:37903) - D 30: Participant 19

There's a flagship programme that we do within the Fashion Council. It's more about how do we trade within Africa as designers?

20:1 2015 and all the Design Indabas that we did. We started in 2012 wi…… (656:962) - D 20: Participant 20

We supported fashion designers through Design Indaba. We started in 2012 with ten designers, and I think the next year we went up to fifteen designers, then we went to twenty designers, then we went to forty designers. Then the last year, in 2015, we turned over 1,1 million, from the retail aspect of it, if I remember correctly. That's literally in four days.

20:3 We do also connect some people to collaborative stores. At the moment we're…… (1821:2342) - D 20: Participant 20

We do also connect some people to collaborative stores. At the moment we're working on creating additional market access for South African fashion designers. We're now busy with viability tests as to how it needs to be run, what needs to happen, how we're going to give these platforms to designers. Taking fashion designers to retail has never been the number-one mandate for us. Basically, it has been about getting their product ready to get to retail.

As observed in the statements above, national and international trade shows, fashion showcasing and other fashion events were found to be highly supported by fashion councils and government institutions. Moreover, fashion councils and government institutions had initiated incubation programmes, business-funding programmes, further training/workshop programmes and research efforts, which were targeted at assisting South African fashion designers in the retail industry. In addition, it was found that CMTs in other regions preferred to work with fashion designers supported by government institutions and/or fashion councils, as those fashion designers were perceived as credible and secure. It was also found that government institutions and fashion councils had made efforts to collect all the necessary industry data required to support the fashion retail industry, but these efforts had not yet materialised or been realised.

Code 5.3. Support from Retailers and Retail Agents

Retailers and retail agents support South African fashion designers in various ways. Some retail agents or consultants support fashion designers with planning and merchandising by forecasting sales, advanced training for retail readiness, communication, mediation and liaising with retailers. Retailers interviewed assisted fashion designers with customised and more advanced training suitable for their organisations, exposure to the various departments, weekly sales reports, and investment funding programmes. The quotations below detail these findings.

32:18 One of the gaps we've picked up is that the students are there in Univ…… (5890:8024) - D 32: Participant 1

One of the gaps we've picked up is that the students are there in university for three or four years, and they all want to go out and become leading designers, but there are a lot of gaps in the process. So we partnered with a fashion-week runway production. They then said, let's come up with a model, where we bring in students from different universities. This project was piloted in 2016, where we brought in students from Gauteng and two cropped up from Durban. In terms of the process we follow, is that we receive recommendations from the universities and colleges, with the students' final ranges, and then we judge those ranges and decide on the finalists. In 2017 we expanded this project to other provinces and people with disabilities. With that, we also said that let's have a 360-degree model, where we look at the disability of the participants and evaluate where we can assist them accordingly. The programme comprises of two phases. The first one is the retail programme, where you cover the technical aspect of it – we take them to CMTs, we teach the students costing, life skills, marketing, etc. This is also a three-month programme where *these participants also have to come up with a collection. During Youth Month we'll then have a fashion show where the students showcase their ranges. Post that, the participants will come into our organisation to do an internship for a year, where the participants are placed in various departments, such as the ladies' department, men's departments, kiddies' department or even shoes. But what we also picked up is that the students will come in and not want to focus on shoes but rather menswear, but it is amazing how that changes once they realise that the other departments also sparks their interest. After the internship, we then ask the participants what their plans are, because almost all of them, when they started, they just wanted to go out there and become designers. But once they're working, they realise that they actually need to learn more, as retail is critical. In our last group, we found that almost 40% of the participants wanted to stay with our organisation as designers.*

17:1 To an extent we are looking at a more enabling and enabled environment…… (1356:1864) - D 17: Participant 8

To an extent, we are looking at a more enabling and enabled environment within which there is an opportunity for designers to, A, be interested in a career; B, to find opportunities to understand the career a lot better; C, to be able to get the necessary training opportunities – that's about the quality and funding of the training; and D, to be able to find an appropriate place to fit into once the training is done to have the right career-development opportunities which make it a more long-term lifestyle.

19:1 the business has invested quite a bit of money into creating a design…… (644:1045) - D 19: Participant 10

The business has invested quite a bit of money into creating a design structure. So where design used to report into a buying structure, design has now its own arm and structure. We have five GMs, which are buying, planning, design, technology and selling. Design is represented in those five pillars by a GM, so there's quite a bit of investment and new structure and people that have been put in place.

21:2 I sponsored a young designers' programme with one of the fashion …… (2073:2368) - D 21: Participant 21

I sponsored a young designers' programme with one of the fashion shows. Now I'm collecting SMMEs, designers, small manufacturers and South African brands by taking them to big businesses, because big companies [are] all looking the same, all looking very *boring, and they need a point of difference. So I'm taking clothing and fashion and homewear to big retailers. Big retailers want to do something that differentiates, so that's what I'm doing at the moment connecting-wise. I'm the go-between to set fashion designers and retailers up as they look for future opportunities.*

33:4 what we do for designers is we spread the service to what they need. G…… (2819:3825) - D 33: Participant 22

What we do for designers is we spread the service to what they need. Generally, their requirement takes it all the way back to sourcing. Because their cash is very tight, we help them that they buy exactly the right fabrics for the season. So we take it back to that point. What we would do is forecast their sales for the season. We would then have a look at their carry into the new season – what is repeatable, what still has the opportunity to trade? We would give their repeat business, we would look at their last year and say to them, these were crackers – can you update? And then we would give them an available sum of money that would then be utilised to create newness and fresh designs. So they have some sort of security of income without going out too much on a limb. Then we take that all the way back to fabric procurement, so five months, and we would say to them, if you're going to open with eight styles, this is the fabric you would need to buy and your cash flow needs to be available in July.

34:14 What we do is we kind of play the middle man because we understand bo…… (7501:8841) - D 34: Participant 24

What we do is we kind of play the middle man, because we understand both the creative and the business side, so we're able to almost be a bit of a translator, so we explain the creative and we fight for the creative when we know it's going to make money, and we fight money when we know the creative is necessary. And obviously by doing that we substantiate constantly – we're not just saying, we want this or we want that; we explain, like, for example, we'll say, it's a limited-edition streetwear, why can't the brand mass-produce it? Because there's a certain way in which it's done, so we have to argue down hundreds and thousands of units to 150 units. At the same time, if the designer isn't articulating the brand correctly, we have to find that middle ground. I think a lot of businesses, especially the ones with a high turnover, tend to be a little bullish with the fashion designers, and the fashion designers that are starting to get reputable start getting bullish with brands, and it's like they're almost too good to work with brands, so there's got *to be some kind of happy ground that is found to increase turnover, to increase profit for the designer and the business, and that's really where we guide them. That doesn't undermine either one of them; specifically, it doesn't take away from the designer's fingerprints and identity.*

In summary, retailers were found to, first, fill the gap fashion education left when supporting South African designers; and, second, provide supply-chain resources South African fashion designers found difficult to attain. The gap retailers filled on behalf of fashion education included comprehensive knowledge of the supply-chain-management model, and specific, practical, on-the-job training of theoretical knowledge. The supply-chain resources and business support retailers offered South African fashion designers included absorption of production costs, readily available retail space for market access, access to trade shows and fashion shows, forecast planning and trend forecasting.

Code 5.4. Support from Other Fashion Designers

The more reputable South African fashion-designer brands had established systems to support other younger or novel fashion designers going into the retail clothing industry or already in the retail clothing industry. The means of support was through mentorships, learnerships, advanced-training programmes and the provision of in-depth information regarding the supply-chain-management process, which can be identified in the statements below.

12:22 I've started already with my TV programme, which is teac…… (12482:12807) - D 12: Participant 3

I've started already with my TV programme, which is teaching younger designers to be fashion entrepreneurs, as opposed to being just fashion designers, because it's not good enough to be a designer. The show is built around not just someone who'll make an amazing garment but someone who'll sell to actual clients.

16:38 That's dependant on designer to designer. I think from our point of view w…… (21729:22778) - D 16: Participant 7

That's dependent on designer to designer. I think, from our point of view, we can assist them with an overview of what it really looks like. We've sold in the best stores in the world. We've sold in the top stores, so we know from a manufacturing point of view. Where we used to manufacture in Vietnam we had also our own office there, right through to the retail *side. We've never had our own stores internationally but we've always had our own stores in SA since the late '90s. I think we would be able to give them a proper understanding of what the clothing business looks like – the shortfalls, challenges. We've been in the game for more than 25 years; we've gone through it all. We've worked with major South African streetwear brands that approached us in the past, sometimes to ask what to do. On marketing, we don't give them any advice because we suck at that, but on anything else, we know enough to be able to help.*

22:3 We currently have interns here. They always come on Saturdays…… (1748:2210) - D 22: Participant 11

We currently have interns here. They always come on Saturdays. It's the final-year students so they are busy with their final-year collection. So we were busy with them. We assist them with everything that they need. We also used to work with the other institutions for other provinces.

Overall, the South African fashion designers received varying support from government institutions, fashion councils, fashion education institutions, clothing retailers, fashion weeks, retail planners, retail consultants, trend analysts and other fashion designers. The findings revealed that most of the support was not coordinated among the different stakeholders, but rather implemented in isolation, with limited coordination or collaborations. As a result, repeated or overlapping support was identified across the various stakeholders.

5.3.3. South African Fashion Designers' Supply-Chain-Management Challenges when Supplying the Retail Industry

Figure 5.3. illustrates the code group that, first, explored the supply-chain-management model challenges South African fashion designers encounter when in the retail industry; these challenges were then divided into codes and sub-codes. Second, this code group considered the challenges found only at the retail front. And third, the code group examined South African fashion designers' supply-chain and business weaknesses when they worked with retailers.

Code six was allocated to exploring the challenges fashion designers experienced with the management of the supply-chain process for the retail industry; code seven was allocated to the retail challenges discussed by participants; and code eight was assigned to the overall supply-chain and business weaknesses that required attention from South African fashion designers. With code six, the challenges discussed by participants were divided into sub-codes to ensure a focused analysis. A total of twelve sub-groups emerged from the challenges fashion designers experienced in the retail environment.

As a result, a total of three codes and twelve sub-codes emerged from this code group. Figure 5.3. (below) illustrates the relationships of the codes and the sub-codes.

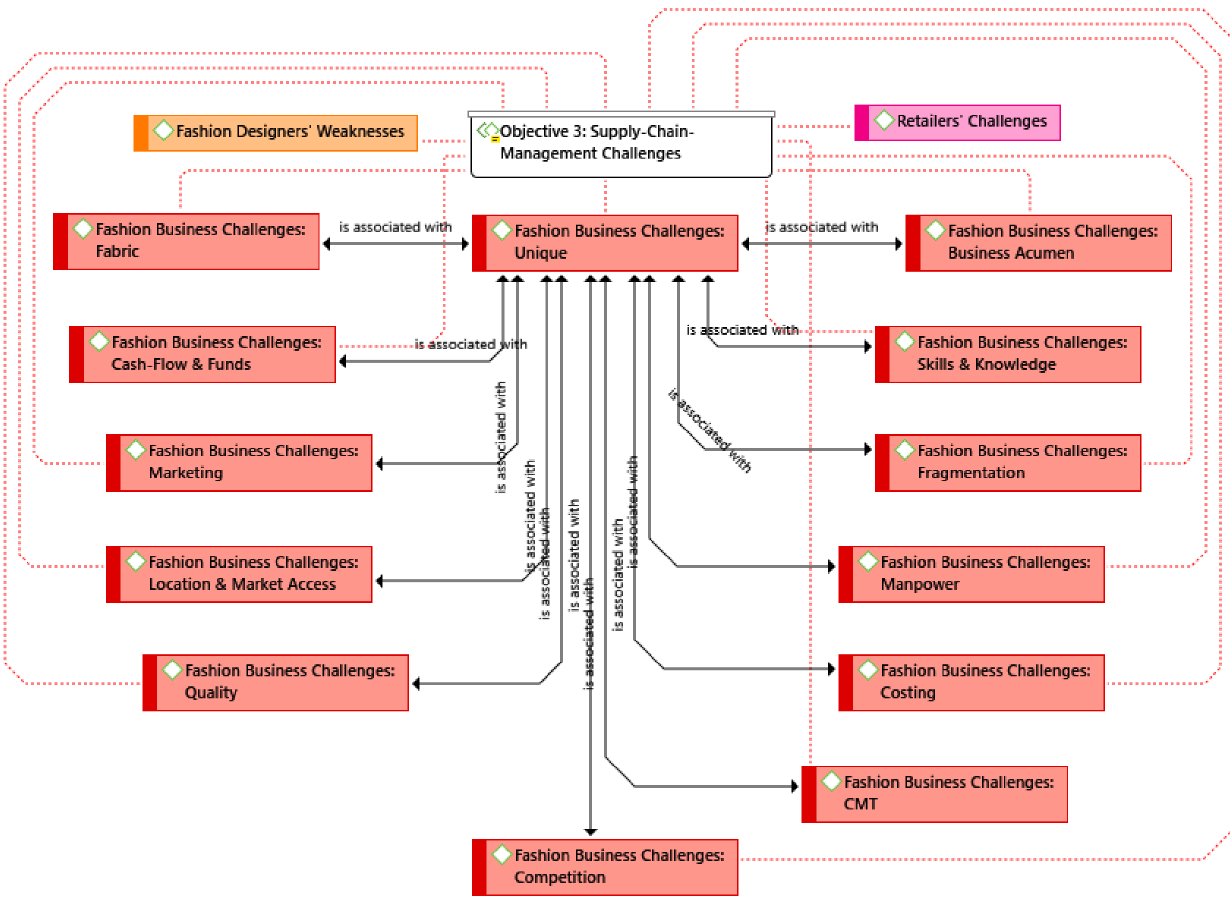


Figure 5.3: Objective 3 - Code Group 3

5.3.3.1. Code 6: Fashion Business Challenges

The interviews with South African fashion designers and stakeholders confirmed that there were several challenges experienced within the supply chain when producing for the retail industry. As the interviews progressed, some challenges were mentioned more frequently. As a result, the following sub-groups emerged: cash flow and funds were mentioned twenty-eight times, fabric was mentioned twenty-six times, CMTs were mentioned twenty-three times, skills and knowledge were mentioned eighteen times, the business acumen of fashion designers was mentioned seventeen times, market access and location was mentioned thirteen times, human skilled resources was mentioned twelve times, quality was mentioned eleven times, fragmentation was mentioned eleven times, costing was mentioned nine times, marketing was mentioned eight times, competition was mentioned five times, and other uniquely varied challenges were mentioned ten times.

Table 4 presents the broader view of the abovementioned challenges. It was found that, according to South African fashion designers, the biggest challenges experienced with the management of the supply-chain process were with CMTs (in the third column, which is shaded in red); second was with fabric (in the third column, which is shaded in orange); and the third-biggest problem mentioned was with cash flow and funds (in the third column, which is shaded in yellow). Fashion councils identified marketing as the prominent challenge, while government institutions, retailers and education mentioned cash flow and funds much more frequently than the other challenges.

Overall the total (in the last column of the table) indicated that the biggest challenges experienced with the management of the supply-chain process for South African fashion designers in the retail industry were first with cash flow and funds (shaded in dark red); second, with CMTs (shaded in orange); and third, with fabric (shaded in yellow). In addition, ten uniquely varied challenges (shaded in yellow) were identified, as highlighted in Table 4 (below).

Table 4: Supply-Chain-Management Challenges for South African Fashion Designers

	Fashion Councils	Fashion Designers	Fashion Education & Skills Development	Retailers & Agents	Government	Totals
● Fashion Business Challenges: Business Acumen	1	4	3	7	2	17
● Fashion Business Challenges: Cash-Flow & Funds	1	5	7	10	5	28
● Fashion Business Challenges: CMTs	1	15	1	4	2	23
● Fashion Business Challenges: Competition	0	3	0	2	0	5
● Fashion Business Challenges: Costing	1	2	2	2	2	9
● Fashion Business Challenges: Fabric	1	11	2	5	7	26

• Fashion Business Challenges: Fragmentation	2	2	1	1	5	11
• Fashion Business Challenges: Location & Market Access	2	6	2	3	0	13
• Fashion Business Challenges: Human skilled resources	2	4	3	2	1	12
• Fashion Business Challenges: Marketing	2	3	0	3	0	8
• Fashion Business Challenges: Quality	0	2	3	3	3	11
• Fashion Business Challenges: Skills & Knowledge	1	6	3	6	2	18
• Fashion Business Challenges: Unique	0	5	1	2	2	10
Totals	14	68	28	50	31	191

Unique challenges are the first challenges discussed. These challenges were not allocated a sub-code, as there was not a recurring pattern among participants. The challenges that were mentioned were: technological challenges; low barriers of entry to the fashion industry, which affected the credibility of South African fashion designers; confusion from consumers due to the re-branding required from high-end fashion designers who enter the retail industry; challenges with trade rules, legislations and policies; false or misleading claims regarding local production by government departments and retailers; and lack of foreign investment in the country's value chain from foreign businesses operating in South Africa. The statements below detail the summarised findings.

- Technological challenges:

  22:36 Even the printers we use are not as advanced. Most things… (25356:25828) - D 22: Participant 11

  Even the printers we use are not as advanced. Most things, we do them manually, like the cleaning and putting on of pockets, whereas they have machines, and things are computerised to fit the pocket and clean.

  26:12 The main thing is technology. We have to improve on our tec…… (9122:9603) - D 26: Participant 15

  The main thing is technology. We have to improve our technology. We are very much behind. The whole clothing industry in SA, we are far, far, far behind. I think that's the main thing. If we could have that, I think that would be the best thing. Also, I'm not just looking at *the designers alone, I'm also looking at the manufacturers that we are training. They also need to have that kind of support, mechanically and otherwise, so that they can supply the major market. The issue with technology is quite critical.*

- Low barriers of entry to the fashion industry:

  13:8 have found with fashion, the barriers to entry are very low if you ha…… (6577:7252) - D 13: Participant 4

  [We] have found with fashion, the barriers to entry are very low. If you have a sewing machine, you're a designer, even if you're just a seamstress. So those are some of the challenges we've picked up, unlike with the interior-design field – there you need to be accredited and you need to belong to [a] guild, so it's very structured, it's very policed, it's like a career that you can be proud of. But with fashion, even if you don't have an education, you can even be fresh from high school, and you know how to sew and do beautiful suits, they call you a designer, and you can enter the field and you compete with someone who even has a Masters, so those kind of things need to be sorted.

- Re-branding for high-end fashion designers who are in the retail industry:

  14:5 Our diffusion lines, we supplied to an online retailer and with a huge department store. That was not a great…… (1501:1805) - D 14: Participant 5

  Our diffusion lines, which we supplied an online retailer and one of the major department stores in South Africa, [were] not a great move for us as a brand, because we called it [a] slightly different name to our current brand name. In the US people get to understand that, but in SA, when you associate a diffusion line with an original high-end brand, people don't understand that.

- Challenges with trade rules, legislation and policies:

  17:11 then it comes to the technical challenges the designers face – technic…… (6957:7097) - D 17: Participant 8

  Then it comes to the technical challenges the designers face – technical in terms of movement of goods, trade rules that exist across Africa.

- Greenwashing: False or misleading claims regarding local production by government departments and retailers:

  22:36 Some of it we can't be proud and say Proudly South African. Because no…… (25356:25828) - D 22: Participant 11

  Some of it, we can't be proud and say Proudly South African, because nothing has been made locally. Everything comes from outside. These big companies, sometimes they lie. They do stuff abroad, let them be unfinished, and come put buttons here in SA.

- Lack of foreign investment in the country's clothing value chain from foreign businesses operating in South Africa:

  30:8 You get the people that don't get that concept, they think money just…… (13222:14116) - D 30: Participant 19

  You get the people that don't get that concept, they think money just comes. No, it comes from us, the taxpayer. The food and clothes that I'm buying generates and shows up – this is how much people are buying, etc. You can see people now are not being tracked because we've got the Chinese, who don't invest back into the country, they get all the raw materials – yarn, fibres – even your finished products, fabrics from home, and it's manufactured by them. So they get the money. Then they ship it here for an unrealistic price, that now there's no benefit. They create their own little laws and guides, and people end up not benefiting. It's like a sweatshop in SA. I engage in those interventions as well because you can't create a sustainable industry with those impasses.

- Unrecognised and unappreciated value added by South African fashion designers:

  17:22 Then you get challenges of lack of appreciation …… (14221:14436) - D 17: Participant 8

  Then you get challenges of lack of appreciation of the design space and opportunities that you're creating.

The statements below provide broader contexts of the challenges South African fashion designers encountered with the management of the supply-chain process when they supplied for the retail industry. The sub-codes from each code are discussed in more detail below, as the findings demonstrated.

Code 6.1. Cash-Flow and Funding Challenges

The main challenges identified with cash flow and funding were the following: the purchasing power of the South African market, which appeared to not generate enough revenue for South African fashion designers; the availability of and accessibility to loans and funding for South African fashion designers from banks and government institutions; the government's focus on and allocation of funding to bigger businesses, which results in the marginalisation of smaller businesses such as local fashion designers; limited information on funding opportunities from government institutions; limited budgets from funding and government institutions; the thirty- to sixty-day payment method most retailers enforce when they procure product from South African fashion designers; the concession and consignment model, which works on a commission basis; the historically disadvantaged background of some South African fashion designers, which made it more difficult to attain funding and financial support; the short-term funding relationships between government institutions and clusters meant to support the industries; the raw-material and production costs used for replenishment and increased orders from retailers; fast business growth experienced by certain fashion designers due to demand – as a result of this growth it was found that increased supply-chain capacity was necessary, which required additional cash flow; the inability of fashion designers to manage finances by scaling up their business while saving for business needs; and the production costs incurred when fashion designers worked with large volumes.

> *32:32 Cashflow problems. I think part of where it went wrong is that the sup…… (17521:18003) - D 32: Participant 1*
>
> *Cash-flow problems. I think part of where it goes wrong is that the supplier grows too big, to the point where they just want more business and don't admit that they can't meet the orders. They then end up outsourcing and subcontracting the required order as they wouldn't have the capacity. What then would go wrong would be the quality. Though we inspect the suppliers and found them compliant, the subcontractors wouldn't necessarily deliver on the same quality.*

> *32:45 The second challenge would be the start-up capital because then you're going to end up with funding…… (23618:24254) - D 32: Participant 1*
>
> *The second challenge would be the start-up capital because then you're going to end up with funding problems.*

11:16 As SA we don't have a population with a huge purchasing power and that…… (9696:9952) - D 11: Participant 2

As SA, we don't have a population with a huge purchasing power, and that is a problem because the thing is that as a brand, when you start your business domestically, you need to generate enough of a cash flow so that you've got a nest egg to take you overseas.

13:11 Another thing is funding, I see with banks, they don't want to really…… (8417:8937) - D 13: Participant 4

Another thing is funding. I see with banks, they don't want to really fund fashion designers. No one will want to give you a loan for fashion, but banks and whoever will actually jump up to fund an interior-design business, because of the credibility, as fashion has no credibility.

17:18 You could walk into a room and they would've invited designers …… (11488:12274) - D 17: Participant 8

You could walk into a room and they would've invited designers and maybe there are sixty people in the room and forty of them are black. But of the ones who are actually able to make money, put food on the table, achieve sustainability in the model, typically they are white. That's because there are large elements of self-funding, historical funding, legacy funding that they've been able to use to set themselves up. W*e need to look at how to redesign that in the SA model – how do we change that? It's not going to change if it's left to the private sector to drive the modalities of change. You need the likes of government and its education programme and funding to be the driver of change.*

22:32 if the government could support designers, I'm sure it will change, it will…… (23565:23772) - D 22: Participant 11

If the government could support designers, I'm sure it will change, it will be sustainable. It's just that it's very hard to get financial support from this government, even banks. That's what hinders everything.

23:10 Access to finance is a challenge, as there might get a big order…… (5567:5928) - D 23: Participant 12

Access to finance is a challenge, as they might get a big order, but they may not have money to manufacture. And if you have to pay rent, you have to pay for it. There's no way to say, okay, because you didn't sell you, you're not going to pay.

24:8 In SA, especially from the department of trade and industry, in the di…… (6974:7752) - D 24: Participant 13

In SA, especially from the Department of Trade and Industry, is the discussion of the establishment of the entity. We also have the discussion coming through from provincial government, and also national government, that the cluster has to be self-sufficient by a certain time. Normally it's not a very long time frame; normally they give it, maybe, the first term, which is three years. We normally fund on three-year cycles, or they'll say five years. Now, when you are talking about assisting industry to change behaviours and to develop in a way of an upward trajectory, it doesn't make sense to put such a limited time frame on it. And also, the kind of outputs that are required and the kind of funding that is put into the clusters tend to be a little bit at odds with each other. So firstly that is a huge challenge, that you immediately get placed with[in] a time frame, you immediately get placed with[in] a limited budget. And at the same time, you are fighting to create some sort of bond with your industry.

25:13 The problem is they don't have the money. If one of our big retailers wanted them to…… (12793:13200) - D 25: Participant 14

The problem is they don't have the money. If one of our big retailers wanted them to do a collection, it wouldn't get off the ground because they'd want to see twelve to fifteen garments. Who's got the money to make them? And then he's got to have the air ticket to get to Cape Town. And then he's got to have the accommodation. And then they're going to give him a sample order, so courier fees, sampling fabrics… It's just impossible.

26:13 I feel like it's unfortunate because of the industry downturn there's…… (9666:11934) - D 26: Participant 15

I feel like it's unfortunate. Because of the industry downturn there's been funds that are reserved for the revitalisation of this sector. I don't know why it's very difficult. I don't think that the DTI is playing its part when it comes to that, because their focus is more on supporting the very big guys. They are not about rebuilding something that has really crumbled. Who they're funding is not filtering into the lower end of the target market. Those funds are available, [but] they are returned, I think, every year back to the treasury, I suppose because they do not work on making sure that it goes to who may require them. We as a sector [fashion] are not supported by the DTI. It's very difficult; economic *development, they are not there. I'm saying this because the industry had a downturn, so it still needs the government's support and [to] make sure that we build necessary skills so that we can tackle the industry. But we also have private companies. I think also the issue of them getting assistance from the government becomes a problem because they are not really ploughing back. We still struggle because now they form their own little NPOs because they are protecting their own. You'll find that you'll have these big retailers and they'll say, we have our own developmental thing here on the side, and DTI is able to give them sixty or eighty million per annum, and they take this money. It's just for them because anyway it belongs to them. But then those are the people that are really getting the money, so what can you do? The private sector gets support fully but there's no will, especially from the big businesses.*

27:7 Fashion designers think that we're sitting on resources that can help them…… (4987:5344) - D 27: Participant16

Fashion designers think that we're sitting on resources that can help them. You get a designer thinking you'll give them R100 000 but for us, we're looking at our budget and, say, for one person, R100 000? How do you just decide that? So they're not always understanding.

29:3 We have 6 successful fashion designers in retail. However, some of them……. (3594:4023) - D 29: Participant 18

We have six successful fashion designers in retail. However, some of them eventually pulled out of the big department store because of funds. Then again, all the designers that were at one of the national independent retailers eventually pulled out as well because of money – they couldn't replenish.

29:16 So, it's access to people like myself and money is a big factor because…… (11931:12398) - D 29: Participant 18

So, in addition, it's access to people like myself, and money is a big factor because even if I'm coming, I'm coming at a fee. So they don't have access to me, and the only way they can have access to me and people like myself is through municipal-funded initiatives where municipal then pays me to come. Even though they can do it on their own, they now don't have the resources.

21:18 on the retail side is where it all falls shorts because all concession…… (8326:8605) - D 21: Participant 21

On the retail side is where it all falls shorts because all concession models, like if I take them to a boutique, the boutique wants them to put their garment in the store, and when it's sold they want to take 20 or 30%, so the funding for designers is put into stores until it sells.

21:19 you go to a retailer, they only pay the invoice month-end or in 30 days…… (8617:9166) - D 21: Participant 21

You go to a retailer. They only pay the invoice month-end or in thirty days, and they still take a discount. So you can't afford [the] cash flow.

33:8 Cash. It's not actually cash per se, its cashflow once they start trading…… (5759:6697) - D 33: Participant 22

Cash. It's not actually cash per se, its cash flow once they start trading. Generally, they'll have enough money to start up [but] because their stock may not sell as fast as they anticipate, they can't get past the first three months. You need a bit of an economy of scale to start making the business work properly. But the cost of actually getting them into the market is taken up, A, with all the raw materials, so that kind of large cost that they have to carry. And they generally have a rental agreement or a commission agreement, and once that commission kicks in at the end of month one, then they'll have to go out to stores and buy more fabric to start producing cheaper. That's when they get into trouble.

Code 6.2. Challenges with Fabric

South African fashion designers, retailers and stakeholders confirmed that fabric was one of the biggest challenges faced, due to the following factors: the cost of quality fabric when producing for the retail industry; the turnaround time when printing fabric for the retail industry; the limited fabric-production mills and manufacturers in South Africa, which resulted in limited fabric locally; the limited fabric knowledge fashion designers demonstrated when producing for the retail industry, which resulted in compromised quality and standards; the increasing number of imported fabric, with some local fabric mills being forced to shut down; and the leniency of import duties and policies surrounding the importation and distribution of textiles.

12:11 Unfortunately with the masses it's a game that you can't control. In a…… (6254:6861) - D 12: Participant 3

Unfortunately, with the masses, it's a game that you can't control in a sense that one-on-one you can tailor-make something for one person, [whereas] with mass production, one garment must fit three people, so somehow you manipulate your patterns. In most cases, the fabric is not the same as the one you wanted, like Egyptian cotton, which can be very expensive if you're going mass.

14:29 I think the biggest challenge is because of the saturated market we ha…… (10719:10957) - D 14: Participant 5

I think the biggest challenge is [that] because of the saturated market, we have a handful of suppliers in terms of fabrics and trims. For instance, if I say I want a particular print from one supplier, any other designer can walk in and buy it.

14:31 Our biggest challenge now is turn-around time because printing takes t…… (11168:11742) - D 14: Participant 5

Our biggest challenge now is turnaround time because printing takes time, and also it just slows down the whole production process, and that's just fabric on its own. In addition, we have a limitation of fabrics in our country and continent, and [for] what we have the price point is higher. If we were buying fabrics directly from the mills in China, India or wherever, it would be cheaper. However, the fabrics come here with higher price points and force our margins to go higher, and ultimately that causes issues with customers, complaining that the prices are higher than usual.

16:29 We don't have. If the will is not there from the government, from the…… (15324:16174) - D 16: Participant 7

If the will is not there from the government, from the people in the clothing industry, then it's no use to even pursue that. If people want to keep on doing, e.g., a T-shirt, if they want to keep on doing just 165g, and maybe the maximum they will do is overdye, they cannot do all the different washes. They want to, they want to spend money on machinery to do those washes. There's no innovation. Then what's the use? How are you as a brand going to stand out? Because you're competing against brands like Diesel, Replay, Scotch and Soda, etc. They deal with any factory around the world, the best. But we limit ourselves to Africa because we're from here, so we want to be straight up with that. But it has its challenges.

You still have to compete on that level and the other brands don't care where they manufacture but we do.

17:22 Then you get challenges of access to materials, the age-old story of…… (14221:14436) - D 17: Participant 8

Then you get challenges of access to materials, the age-old story of fabrics are unavailable in this country.

22:5 As much as the government supports the designers, it lacks on-chain. It do…… (5084:5327) - D 22: Participant 11

As much as the government supports the designers, it lacks on-chain. It doesn't come from agriculture, it's from cotton to weaver to whomever. Somewhere, somehow, we catch it in the middle. We use fabric that we don't know where they're coming from.

22:6 When we go to exhibit in other countries, we don't know the IZO co…… (5337:5960) - D 22: Participant 11

When we go to exhibit in other countries, we don't know the IZO codes. It's because you don't know where it was coming from and they don't even know the results. If your supplier tells you, this is cotton, you believe them, because the supplier told you it's cotton, as you don't even know it's cotton mixed with what. Whereas I know the best cotton you'll get, top of the range, you'll get it in Egypt. You know what the tag means when it says 300 thread count x 200 but because we don't have the mills and the textile companies here, we just get what is given to us. So it becomes difficult when you go supply outside or retail.

22:7 Fabric is bought in rolls, they are not the manufacturers. Because the…… (6162:6438) - D 22: Participant 11

Fabric is bought in rolls because the manufacturers of the textile are not here [in South Africa but mostly in China]. Then the fabric is requested in rolls, without the certainty that the same fabric will still be available the next time it is requested. The fabric manufacturer we worked with retrenched so many of their workers, they've minimised the plant to really less staff. They're facing big challenges. We have big challenges of fabric in SA.

23:8 There should be that link of designers with the fabric manufacturers…… (4439:4883) - D 23: Participant 12

There should also be that link of designers with the fabric manufacturers. The designer should be able to say, I want this type of fabric or there's this type of fabric, how can I design it? So our value chain is not structured at the moment, and that is the main challenge I see with the designers.

24:19 We are very creative but at the same time, because the material is where t…… (19882:20517) - D 24: Participant 13

We are very creative but at the same time, because material is where the technical aspects lie and we don't have a mind for the material – and I'm talking actual fabric, I'm talking about what fabric can do, what textiles can do, what it's capable of, what is able to be dyed into and not dyed into, can you print on this and that, also the quality of those materials – because our technical ability does not reside in that space, at the end of the day it doesn't enhance our capabilities in understanding everything that is necessary for our craft. And that's the only way that you're going to be able to get yourself into the store.

30:1 SA biggest challenge at this point is that our textile industry is clo…… (7702:7939) - D 30: Participant 19

SA's biggest challenge at this point is that our textile industry is closing down, since 2002. There are currently no black-owned textile mills. They're all either owned by Chinese or Turkey, with the advantage of the minority groups. They have the background knowledge because within their countries they had the transitions long ago. They started the mills and came to this side. Things are not going well for them due to the import rates. It's mainly how things are coming in the country. We haven't been observant or stringent enough to say, what are you actually bringing in? Is it really polyester? Do we have people in the field at SARS level? At the import duty to test and ensure that the stuff that is coming in is coming in at a good value.

30:14 the problems are more visible when you start encountering with the peo…… (20570:21185) - D 30: Participant 19

The problems are more visible when you start encountering the people. First of all, they don't have enough land. [For] the ginning process they are using a machine from fifty years ago. They need more cotton, so they need more land, or more people coming in, like your

Mozambique cotton farmers, to bring everything to this ginning mill. And they're using old material, so they're involved a lot with other government departments, e.g., Dove, all the agriculture side. When I spoke to FP&M SETA to find out what can be done in this process, they said there's still agricultural side, we only come in when there's a spinning mill.

33:19 I have to go back to fabric. I think fabric and the procurement of…… (13548:13867) - D 33: Participant 22

I have to go back to fabric. I think fabric and the procurement of specialised fabric is difficult. And often they end up with the same fabrics, especially prints. Where the prints, you'll walk into a store and you'll see the same prints in various silhouettes, simply because there's such a small base of fabric procurement.

Code 6.3 CMT Challenges

The findings confirmed that most CMTs preferred to work on larger orders and were not willing to work with the minimum quantities South African fashion designers requested, but when some of the CMTs agreed to work with the fashion designers, they would charge them higher premium prices for production, while the fashion designers and retailers found that the CMTs produced quality that was below the retail standards. On the other hand, several CMTs in South Africa were closing down due to a lack of skill and increasing competition from international manufacturing companies. The different dynamics within each province also created challenges for fashion designers, as that made the management of the supply-chain process difficult for fashion designers who desired to work with CMTs in close proximity.

32:42 I think the biggest challenge with designers is your CMT costs, as the…… (22681:22800) - D 32: Participant 1

I think the biggest challenge with designers is your CMT costs, as they don't have volumes, which then causes problems.

11:5 We've worked with a couple of CMTs near our business location but their prices are just as…… (3338:3529) - D 11: Participant 2

We've worked with a couple of CMTs near our business location but their prices are just astronomical. And as a SA consumer, you could go to Cotton On or Mr. Price and spend R350 on a product that fulfils a similar role.

12:9 Sometimes when it goes to the CMT you're los…… (5929:6143) - D 12: Participant 3

Sometimes when it [designs] goes to the CMT you're losing some finer finishes, like it's not necessarily packaged the way you want or doesn't sit the way you want because of certain quality measures.

14:32 The manufacturing part is very problematic, not many people are willin…… (11745:11883) - D 14: Participant 5

The manufacturing part is very problematic. Not many people are willing to do high-end products in South Africa as we expect it to be done.

16:11 But you always have an issue in SA where, per style, the factory won't…… (7782:8123) - D 16: Participant 7

But you always have an issue in SA where, per style, the factory won't make less than 500 per style. So you've got to sell. Imagine you have 60/120 styles, it's a lot of money, first of all, that you've got to lay out. But also, you've got to have a lot of stores to sell that through. If you don't sell it through, you're sitting with the stock.

22:18 before we used to do CMTs and outsourcing, but the quality we used to…… (12923:13018) - D 22: Participant 11

Before we used to do CMTs and outsourcing, but the quality we used to get from them was so bad, we said no.

23:8 Because when you look at the manufacturing company at least now they'd…… (4439:4883) - D 23: Participant 12

Because when you look at the manufacturing company, at least now they do have a link with the retailers, but there is that lack with the designers.

23:15 Yeah it affected a relationship with retail because remember there wa…… (10436:11470) - D 23: Participant 12

The designers take it to a CMT and it doesn't come back as what they wanted. But if they had product development, they would see those mistakes before it even goes to a CMT.

26:2 This designer really took his/her last cent to create this look for the…… (1855:2479) - D 26: Participant 15

Designers can take their last cent to create a look for a specific fashion show, but they wouldn't have the production support behind them to make sure that they're able to produce when a buyer requests a specific look. A fashion designer should be able to say, in a week I can give you fifty of these items, this is where I can manufacture, this is my capacity. However, they do not have that kind of information that they can give to buyers, so it's either the designers take it China or they take it to any other country. Which means we're losing our IP.

28:27 Have you had that before (surprise from a CMT with production gone wro…… (20300:20818) - D 28: Participant 17

We have had surprises from a CMT where production had gone wrong – needle damage on garments, that's something that happens every once in a while. Let's say something is printed, especially like a dark floral. Even like this, a light based that's been digitally printed. If there was needle damage, it would pull the yarn and make these white lines. We've had that happen on a full order. And then you can't put that in-store. Then we keep and sell it at our sample sales, just to make back the cost.

28:30 manufacture is one of the hardest things we still struggle at the size…… (24120:25569) - D 28: Participant 17

Manufacture is one of the hardest things. We still struggle at the size of this business to find CMTs that are willing to make the minimums that we want. We're not making very small numbers. You can't go to a big CMT and say, can you make our stuff? Because they'll want a minimum of a thousand and we can't do a thousand. Finding smaller CMTs that are willing to work with smaller numbers is hard, and I definitely think there's a gap, a massive, massive gap for something like that. I suppose the whole distribution in general, how to find somewhere to sell your stuff, how to manufacture stuff, how you get it there, all of that. I don't know if more emphasis needs to be made when studying. I studied at a technikon so it was a technical approach, so what I learned and got from it, I paid for.

33:22 She actually had a factory in Durban, she used for designs. And then s…… (15296:16275) - D 33: Participant 22

A designer I worked with actually had a factory located here, they used for designs. The designer then moved from here to another province. The move, however, was disastrous because the resources she had built up here from a supply-chain perspective didn't exist there. The level of CMT she was used to, the quality of CMT was very difficult for her. I'm not saying it doesn't exist at all, but she couldn't find it. I think that it's not available on a platform. There should be a platform to say, this is where you go and find a CMT in CPT maybe. But you really work there. You've got to hustle to find the resources you need, where you buy your fabrics, where you buy your buttons. You build that up over a longer period of time.

33:23 I have found that Fashion designers don't share the information regarding their CMTs …… (16418:17223) - D 33: Participant 22

I have found that fashion designers don't share the information regarding their CMTs. They're very precious about their CMTs. In fact, I've got a new designer that has just asked me for some advice at this point, and she was saying, where would I find a CMT? So I asked a couple of the designers that I work with, and they were like, you are not to disclose any of our CMTs. We've worked so hard to create relationships with them, and the minute that there's more work, the CMTs put their prices up. So the CMTs are not very loyal generally. The CMTs have to pay their wages, so if the work is coming and coming, they say, no, we're not prepared to share. There is not a big community vibe over CMT – and fabric, for that matter. Because they want exclusivity, so they tend to play those cards very close to their chests.

Code 6.4. Challenges with Skills and Knowledge

The participants expressed continuous concern regarding the lack of skills and knowledge South African fashion designers demonstrated with regards to the management of the supply-chain process in the retail environment. It was found that some factors contributed to this lack of skills and knowledge, and those factors were: the limited supply-chain-management exposure provided by fashion education; the competitive approach of the educational institutions when it came to fashion education; jargon and supply-chain expectations when entering into procurement contracts; the generalisation of fashion and garment skills from fashion education, which resulted in a lack of specialised skills; the deterioration of the textile industry since 2002, which has resulted in lost skills from experts within the industry; the limited business training and emphasis from fashion education, fashion designers and the industry as a whole; the lack of research and information centres in South Africa for fashion designers; the lack of infrastructure in terms of skills enhancement; masked internship programmes, which offer limited knowledge, skills and education to individuals; the lack of value placed on certain areas of the supply-chain process by stakeholders as a whole, creating a deficit of skills in a number of areas within the supply-chain model.

> *15:22 In terms of the resources, I think the skill is also a very challenging…… (13012:13878) - D 15: Participant 6*
>
> *In terms of the resources, I think the skill is also a very challenging factor we have, because you can't expect a seamstress to also be a quality-assurance person. While quality assurance is very broad, there's someone who can QC a finished item, there's someone who can QC just fabric or the customisation of that fabric with prints or embroideries, to dry-clean, pre-wash and all that. All these resources take money to acquire. It's not something you can just teach to any person – they need specialised skills and someone with the passion to do it. And as a designer, I can't afford a textile analyst or technologist. I think the notion of resources is a huge thing [for] small businesses. While in retail they will obviously have that, but for us, it's like trying to catch four balls in the air.*

> *15:35 I would like to see best practices, for designers to understand that s…… (25568:26256) - D 15: Participant 6*
>
> *I would like to see best practices, for designers to understand that supply-chain attributes require them to not work too hard, but to work smart. Because, in most times, you find a designer who wants to consult their customer, who wants to go identify their fabric or swatches, go present their fabrics to customers, sit on the machine, assemble the garment, and then QC, and then still do the fittings, fast forward to that. They still want to do their own PR and they still want to be celebrities and hit the red carpet. You've got to understand your business model, and as you grow, you've got to understand where to let go. And you let go driven by the supply-chain or value-chain analysis.*

17:26 The biggest problem is the education community itself, everyone believ…… (16183:16443) - D 17: Participant 8

The biggest problem is the education community itself. Everyone believes that what they offer must be treated as the best understanding. The moment you have that and no intention to work towards what is common… and it's a difficult space to find commonalities.

18:4 I think the biggest challenge is the disconnect for these kinds of pred…… (2390:2941) - D 18: Participant 9

I think the biggest challenge is the disconnect for these kinds of predominantly creative people understanding business. Even though they're doing business subjects, I don't think the balance is there and I don't think they understand enough about the time they need to put into that part of it. I do also feel [that] even those that have managed to navigate that and have understood the time they need to put into it – it has to be a bit of everything, the planning and that – I think that in SA there aren't enough platforms or enough support for those designers.

26:13 What others will do; they'll just say we are training young people …… (9666:11934) - D 26: Participant 15

What other retailers will do, they'll just say, we are training young people. Then they take young people and they make them fold their T-shirts and make their store tidy, employ them for a year and say it's an internship. But then you'll find that they haven't learned anything. The skills have to be enhanced, the support – there must be a proper infrastructure.

28:30 There's so much that needs to be decided before studying that I don't know if the maturity level of a fresh-out-of-school …… (24120:25569) - D 28: Participant 17

There's so much that needs to be decided before studying that I don't know if the maturity level of a fresh-out-of-school [person] can make those decisions. In my mind I wanted my own a fashion label. I didn't know that you needed to run it as a business. There's so much more to everything than business, and how do you figure that out on your own? And how do you know what you don't know? Like I said earlier, before I started here only 10% of what I do now is what I knew before. I had to learn all of that. I could never have decided that when I was studying.

30:19 the huge problem is that where we're coming from we've lost so much of…… (23398:23634) - D 30: Participant 19

The huge problem is that where we're coming from, we've lost so much of our self. That will teach us about adding value to us, because it's fine and well wanting to add value to clothes but if you don't know yourself it becomes an issue.

34:20 A lot of our tertiary education spaces allow for either designing or s…… (13668:14283) - D 34: Participant 24

A lot of our tertiary-education spaces allow for either designing or sewing yourself, as being in fashion, but as I've just said, there are so many facets in the fashion business that are not offered in terms of education, which is the business side or the buying side or the trend side, or the VM side or the marketing side, that none of our schools prepare them for that. And we know that a few people actually make it as a designer, so what are we actually doing when we're arming these kids? Because there are only so many designers, as there's only one Alexander McQueen, there's only one Chanel...

Code 6.5. Challenge in Business Acumen

As observed in a number of the abovementioned statements related to skills and knowledge, some discussions shifted to the South African fashion designers' business acumen when managing the supply-chain process. The responses below highlight that fashion designers are creatives by nature and naturally possess limited business acumen, and that some South African designers lack the following: understanding of the supply-chain structure and capacity when approached by distributors or retailers; benchmarking abilities; understanding of retail business processes; focused business planning that caters to a specific market; drive, which leads to complacent attitudes towards supporting institutions; business administrative skills; business processes; respect for deadlines; and overall consistency. It was also found that there was a limited understanding of the sales matrix, sales graphs and retail planning mechanisms.

12:25 I think fashion designers, in general, are a bunch of creative people, w…… (13546:13679) - D 12: Participant 3

I think fashion designers in general are a bunch of creative people, which is amazing, and most of them don't have business etiquette.

16:19 what a lot of guys do is they go to shows and they are happy to sell t…… (10880:11621) - D 16: Participant 7

What a lot of guys do is they go to shows and they are happy to sell to somebody. But then back in SA they either don't have the cash or they don't have the ability to produce all their garments, which means then they make the distributors look bad. So distributors are very careful because you've got to honour your word. You must tell them, look, we can only supply you with 10 000 a month or 100 000 a month. A lot of guys have never dealt with that kind of discipline. They don't know what kind of answer to give. They're just too happy to get orders and then they can't deliver and then that damages them but also everybody in SA – the image.

16:41 if designers can be focused and be going through the process without f…… (24396:24832) - D 16: Participant 7

If designers can be focused and be going through the process without failing – here today is gone tomorrow – I think that would change for the retailers, because they would say, we're putting these guys in and we're helping them but some of the guys don't even design. What they do is copy this and copy that. There's so much to play with, so much creativity. You don't have to do that. Retailers do that, they copy everybody like crazy.

19:9 Coming out of college, I think it's probably quite a big challenge…… (4941:5615) - D 19: Participant 10

Coming out of college – I think it's probably quite a big challenge for us – is there's a lot of time spent behind a computer, and I think that's sometimes a bit of a shock to the system with designers. It's also the amount of meetings that take place. Being able to put an idea across in the correct way, being able to highlight what is a commercial but also an inspirational idea. Creativity is imagination combined with knowledge. And we often think young designers that put a lot of focus on imagination but don't realise what has sold, what has worked, who is the customer that is actually going to give you credibility as you move forward in your career.

23:22 Lack of finance. Eve…… (14214:14524) - D 23: Participant 12

Lack of finance. Even if somebody has finance, meeting deadlines or timelines is still an issue, that work ethic. But I don't blame our South African designers. Because if you go anywhere in the world, a designer is a designer. He's not a designer and a marketer.

29:6 I agree with localising in terms of the international retailers that g…… (4882:5537) - D 29: Participant 18

I agree with localising in terms of international retailers that the government has decided to let in, but they are not ready. Their readiness is a big factor, and that's across the board: the design process, quality, professionalism, respect of deadlines, business administration… As a whole, I don't think they are ready, whether they're trained or untrained. The ones that are coming out of university are too childish and they think just because they're qualified, they can now tell everybody where to get off. And the untrained ones have the technical skills but they lack the theoretical skill and the business part of it.

29:24 I know a lot of The Space designers, they don't spend enough time look…… (21942:22255) - D 29: Participant 18

I know a lot of the designers we worked with in retail, they don't spend enough time looking at the sales graph. They get the graph every Monday and even have access to the POS system but they don't spend enough time with POS to analyse their pattern of spending and analyse the graph and see that this thing decreasing at month-end.

33:10 we worked with the fashion council. It was a program where they took 6…… (7621:8210) - D 33: Participant 22

We worked with the fashion council. It was a programme where they took six designers and mentored them. Once they were on their own, their fabrics were sponsored but they had very little business acumen. There was a big gap in their understanding and they needed a lot of handholding, but handholding all the way through to where to buy their fabrics. Because they had never produced in bulk before and they were using the manufacturing incubator. We came out of the programme, I think two of them showed a lot of promise but other than that it wasn't sustainable for them afterward.

31:26 Designers don't have an understanding of the business side, and don't …… (12518:12817) - D 31: Participant 23

Designers don't have an understanding of the business side and don't have a concept that it's not just about the garments. It's so many components – it's the planning, it's the buying of the right things, it's finding CMTs, it's dealing with people, its cash flow, and then not getting distracted by the social media and fame.

Code 6.6. Market Access and Location Challenges

The participants confirmed that there were challenges with South African fashion designers' location, market access and the market in general, which were closely linked to: cash flow and funding; marketing challenges; South African consumers' shopping habits; availability and access to retailers South African fashion designers could potentially supply; incorrect selection of location or the lack of availability of prime locations; the limited understanding of the South African market by South African fashion designers, due to the limited data available; and lack of professions to hire the specialised skills required for the management of the clothing supply chain in South Africa.

11:17 We've done markets and also, talking of consumers and all, SA people b…… (10392:11581) - D 11: Participant 2

We've done markets and also, talking of consumers and all, SA people by large, women shop for their partners. So it's not like a European mindset, where you've got a European man who is very aware of his aesthetic and is curating his wardrobe as to what he likes. I would say 90% of SA men let their wives or sisters or girlfriends buy for them. It's a Christmas present, they've gone to do some admin at Sandton City, I need new work shirts, and then they buy it… It's not part of their most important factor. We've done a couple of pop-ups, part of music festivals, and we'd sell one product, and the other event we didn't sell anything. And that's definitely a certain level of affluence, not saying they're driving Bentleys but they've got jobs and roofs over their heads and a very funky, young crowd in their 20s or 30s, but our stuff is still too expensive. They'd probably rather save up and buy something European or American. Our stuff is very wild and out there. And the one nice thing about our stuff, in the three years since we've been going, we've had phone calls and emails from people from Dubai, France, America, Belgium, Australia, from all over the world, wanting to see if they [can] work with us and how.

14:12 the stand-alone store we use to have at a prime location was purely one per size…… (4782:5056) - D 14: Participant 5

The standalone store we use to have at a prime location was purely one per size, so it was only five units. Customers loved it, it was great and we did well, but because of the overheads and recession, we had to let it go. Our current location, the customers complain because of traffic, strikes and all these things that come with [the] inner city, and we want to make it easy for them to access the product. But before that, we want to make sure that the supply chain is flowing and growing, [that] it works with the team and we know what we're doing.

16:12 we've decided to do our own stores. Also, we wanted to have black-owned…… (8132:8731) - D 16: Participant 7

We've decided to do our own stores. Also, we wanted to have black-owned stores, people of colour that own the stores, because one of our changes that we've made is that we will only deal with the distributors and not supply ourselves to the stores, so that we can focus on the core of the business instead of on distributions and seeing the retailers, etc. We decided in SA in 2015 to go with local guys that opened the stores and so on, but they didn't do it exactly the way we wanted it to be done, for instance, they would open up stores in a location that we would prefer it not to be, or a mall.

17:39 SA is a peculiar market. We have some extraordinary wealthy consumer s…… (17698:18608) - D 17: Participant 8

SA is a peculiar market. We have some extraordinarily wealthy consumer sectors, and then that range goes all the way down. The problem with the range of market that we have, the service/consumer demand market that we have to service, is we have lots of gaps in it that look attractive. But somebody said this to me once, the fact that there are gaps in the market does not mean there is enough market in each of those gaps. So we've got to be so careful. I see people get very excited; they say young men aged 25-30 are looking for high-end T-shirts – you know the kind of thing, where you spend R1 000 upwards on a T-shirt because of the design – and we're just all excited. There's not enough market there to make a living. I think the challenge with designers in the SA space is to find the elements of the market, where there is a market in the market. And a lot of people don't look at that. Our problem is just working on the components of where our design goes. It's so hard for people.

Code 6.7. Challenge of Skilled Human Resources

It was revealed that another of the challenges closely related to skills and knowledge was with the availability of human skilled professionals to assist South African fashion designers supplying the retail clothing industry. This is evident in the quotations below, which revealed that one person usually took on a number of responsibilities within the supply-chain process, and that there was a limited number of skilled staff still employed in the manufacturing industry because of the textile and clothing manufacturing downturn since 2002. This then led to longer lead times, compromised quality and limited stock for the retail industry. Furthermore, it was found that South African fashion designers had limited knowledge of and access to agents or other support services that would assist them with the management of their supply chain for the retail industry.

32:23 Some designers are just really designers they're not manufacturers, an…… (10591:10980) - D 32: Participant 1

Some designers are just really designers. They're not manufacturers. And sometimes they confuse everything, and they think they can manufacture for a big retailer, where manufacturing for a big retailer means big volumes. One of the things I've also learned is that in South Africa, they come to us as a big retailer and say, I want to manufacture for you, but volume, they don't have volume.

11:4 We had worked with this CMT where there were three permanent staff and there other ladies that just come …… (2250:3173) - D 11: Participant 2

We had worked with this CMT where there were three permanent staff and other ladies that just come and go. But every week one or two ladies are missing, and that's 25% of your workforce. It's very difficult for his employees but then it's also very difficult for the owner of the CMT because we are saying, we've got deadlines for clients and customers. You want to get to a stage where the fabrics arrive on the first of March and the product comes out on the first of June. You want something that's a little bit more consistent.

14:35 Now our biggest challenge is that the person that's developing the pri…… (12909:13183) - D 14: Participant 5

Now our biggest challenge is that the person that's developing the print has to then do the actual printing. We're also not in a space right now where we print every day. We print when the project starts and we get it to manufacture, so we need to find a way of conquering this.

16:36 We need human skilled resources and skills in the factories…… (19520:19963) - D 16: Participant 7

We need human skilled resources and skills in the factories to diversify our products, so it's easier said than done.

18:5 I know that, for instance, in other countries, the designers wouldn't w…… (2953:3329) - D 18: Participant 9

I know that, for instance, in other countries, the designers wouldn't work directly with a retailer. Say they want to sell to a retailer, there would be sort of an agent, and we don't have that here.

23:4 with the challenges that we've noticed working with the designers our…… (3136:3338) - D 23: Participant 12

With the challenges that we've noticed working with the designers, South Africa is set up in a way that a designer is a designer, is a dressmaker, a marketer… They do everything themselves.

Code 6.8. Quality Challenges

Some respondents noted that quality was one of the challenges South African fashion designers encountered with the management of the supply-chain process when supplying the retail industry. The statements revealed that quality-control measures, management and processes were a very expensive exercise, which was interlinked to fabric suppliers, CMTs, delivery times and South African fashion designers' skills and knowledge. Moreover, it was found that quality affected the patronage of South African fashion designers' products by retailers and consumers alike, as mediocracy was embraced rather than being addressed.

13:15 Not directly, but quality affects everyone, because once you work with…… (11186:11464) - D 13: Participant 4

Not directly, but quality affects everyone, because once you work with a designer whose stuff isn't the right quality, then even if you come across someone who wants a referral to a designer, then you'll not refer a particular designer because of the type of quality they produce.

14:42 Quality in terms of clothing, we need to make sure we can serve high-e…… (18616:18979) - D 14: Participant 5

Quality in terms of clothing: we need to make sure we can serve high-end quality. We all want quick turnaround times, quick shortcuts to get the product done. We don't focus on fit, finish and also fabrications, where you still find some compromises.

15:19 Quality control and from the supplier side, how distinguished the fabr…… (11327:12315) - D 15: Participant 6

Quality control, and from the fabric-supplier side is required to check how distinguished the fabrics are, because the last thing you want when selling to retail is to produce with an easily accessible fabric that can be duplicated on another design.

25:20 Quality is a huge problem. My problem with designers is they spen…… (18737:19032) - D 25: Participant 14

Quality is a huge problem. My problem with designers is they spend weeks and months designing a collection and then I say to them, go put it on and they won't put it on. And I say, why? They say, I'd never wear this. So why make it? Why design it? So that's my biggest problem with designers.

29:13 The minute a black designer is able to marry quality, value, and costi…… (9511:9639) - D 29: Participant 18

The minute a designer is able to marry quality, value and costing in one sentence… The problem is a lot of designers can't do that.

31:9 Quality, that's where there are not enough small CMT businesses designer…… (4810:5160) - D 31: Participant 23

Quality: that's where there are not enough small CMT businesses designers can find that [are] reliable, so quality can be erratic or not good stitch-wise, delivery-wise, fabric supply. Because when you're smaller, you rely on going straight to stores to buy fabric. It's when you grow when you can actually work with wholesalers. So that is a big challenge.

Code 6.9. Fragmentation Challenges

The findings illustrated that fragmentation was one of the factors that contributed to the difficulties South African fashion designers confronted when managing the clothing supply chain for the retail environment. Fragmentation challenges involved, inter alia, the following factors: work done in isolation, which resulted in intensified levels of competition and lack of collaboration between local fashion designers; lack of communication and follow-through between government departments supporting local fashion designers; unequal and lack of availability of supply-chain structures in one province or one area; limited support, offerings and resources for the management of the supply-chain process at fashion weeks for fashion designers in the retail environment; and lack of shared information between institutions.

12:27 I think our fashion industry is very divided, there's a lot that needs…… (14352:14528) - D 12: Respondent 3

I think our fashion industry is very divided. There's a lot that needs to be done. For one, we need one fashion week in South Africa. We need one voice and it must be regulated.

13:10 Another challenge is the lack of unity and working in isolation, as fa…… (7633:8416) - D 13: Participant 4

Another challenge is the lack of unity and working in isolation, as fashion designers don't like collaborating with each other, and what they haven't realised is that there's strength in numbers. What we find in the other design sectors, the designers work together and that's where they draw their strength.

14:52 and we need to get to the point whereby we allow an entire value chain…… (25236:25987) - D 14: Participant 5

And we need to get to the point whereby we allow an entire value chain to come alive, for designers, fabric buyers, manufacturers, showroom representatives, even PR; for fashion, just directed at fashion. [It] needs to be done properly, and when this value chain is in place, then we become retail ready, as we are only at an entry-level right now as a South African Industry, whereby many things are not collated to become one massive winning formula. We're all doing our own thing but how many people want to be part of that? Very few, and that's why we need people who're willing to say, let me start a showroom for designers. Start with three, sell them locally and internationally, and we'll see the growth, then we can start having a proper retail-ready industry.

24:9 One of the biggest challenges that the SA industry has faced…… (8341:9243) - D 24: Participant 13

One of the biggest challenges that the SA industry has faced – when I say industry I'm actually talking about all industry – all industry SA has faced has started at a particular base that is very conservative. Conservative in a way that they don't share information with each other, they feel very protective of their own IP or their products or their intellectual, in whatever way.

24:12 So the challenge was in that establishment was recruiting people, tell…… (10191:10749) - D 24: Participant 13

So the challenge was in that [the] establishment was recruiting people, telling them that they are important and giving them the tools to be better at what they are doing. And then trying to create a collaborative and sharing an environment where they can work together to be better. We didn't see that very quickly in fashion and it took probably about the first three or four years. In fact, in the first two years, you could say that the actual establishment of the body itself was difficult because it's like you going off and starting your own business.

20:9 one of our biggest issues is the levels of IP in this country. Here we…… (6352:6671) - D 20: Participant 20

One of our biggest issues is the levels of IP in this country. Here we've got Spree and Superbalist – they would be able to tell us how the market is moving online but they won't. Another issue that we're going to find, even if we did get their data, they curate their designers to what they think is currently trending.

Code 6.10. Costing

Costing challenges were mentioned by some participants, who highlighted the following that there were product offerings by South African fashion designers with price points that appeared too high compared to the value proposition and quality of the garments. Furthermore, the price points of local fashion designers were found to be too high for local retailers and local consumers, due to the smaller margins of production. The level of preparedness when costing a garment also appeared questionable, as there were local fashion designers who would cost a garment before considering all the materials and factors required. And other local fashion designers would not set the appropriate mark-up to justify or educate the consumer about their particular price points.

32:22 I've always maintained that though we want our designers in retail, bu…… (10224:10587) - D 32: Participant 1

I've always maintained that though we want our designers in retail, but some of them can only manufacture very few stuff. It becomes very costly, and if they go into a big retailer as an unknown brand charging between R800 and R1 000, not aligning to our price points as a retailer, people may not necessarily buy the new brand, unlike if the price points are aligned. With fashion designers specifically you find that others are known for their upmarket *style, so to try put them into a retail store, where our price points are at a certain level, that's where we find the challenges to be. As the consumer could feel that they don't want to buy a shirt, for example, for R700. So, as a result, we end up selling that stock at cost price or below cost price [as] a write-off.*

29:11 So the costing, quality, and value are the things that are not respected…… (7511:7882) - D 29: Participant 18

So the costing, quality and value are the things that are not respected. I get the whole lead-delivery and lead-time thing, but the minute designers start to understand that clothing is a business, and it's not about the fact that you started a clothing-design business because you can't find certain clothes for yourself – you need to take yourself out of the equation.

30:31 they don't put the money values as well towards looking at the fact the…… (31460:32552) - D 30: Participant 19

They don't put the money values as well towards looking at the fact that the machine is there, and [thinking], I'm selling this item for this much. It's my work time, the fabric costs, the machine cost, the maintenance of the machine. When you're doing the costing, everything needs to be considered. Don't thumb-suck an amount because you see a certain designer selling a garment for R5 000 and then you want to follow suit. I spoke to this one girl here, I was asking for a jacket, and she said it was R2 500. In my mind I'm all for supporting local but what makes it be R2 500? Your human skilled resources? The fabric? You got it from China and the metre is R89 – I'm doing the maths now. She said to me, it's a lot of work. You're assuming I don't know what goes into making these things. I don't mind you saying you're charging because it's a lot of work, but I could do it myself. I just wanted to buy it because it was available but at what price? I'm very conscious of that. You can't sell me something and then call it as of value. I need to determine what value it is, what's a value add for me?

21:13 The designers they're disasters, you've got to help them a bit. The…… (6915:7077) - D 21: Participant 21

The designers, you've got to help them a bit. They just want to design everything; they don't understand commercial viability from a price point.

33:17 So where I see a lot of things coming off in the season is when there is…… (11575:12339) - D 33: Participant 22

So where I see a lot of things coming off in the season is when there is a range in mind, it hasn't been executed in a range fold and therefore the fabric bind is sporadic and doesn't actually suit the garment because it's last minute. Sometimes I will sit with the designer and they'll say, we're going to do these five styles for next month. And I'll say, where is your fabric? And they go, no, we're going to go buy fabric. So now they haven't costed the fabric and if it's too expensive the margin gets … It's that level of preparedness, I think, that isn't really coordinate.

Code 10.11. Marketing Challenges

The findings established that marketing was one of the challenges South African fashion designers faced when managing their supply-chain process for the retail industry. The marketing challenges were linked to market access and information, and finally with cash flow and funding connected with the cost of showcasing at fashion weeks. The government initiatives that supported the showcasing of South African fashion designers at different national and international platforms were found to be planned in isolation, with no consistency and without the consideration and input of the local fashion designers. On the other hand, retailers were found to provide minimal to no marketing support to South African fashion designers who supplied their stores. The marketing challenges South African fashion designers came across resulted in limited consumer knowledge regarding their product offerings and their product specifications that affected the price points.

14:41 The business of fashion it's still growing, as we're still at baby…… (17893:18488) - D 14: Participant 5

The business of fashion, it's still growing, as we're still at baby steps, but beyond that the biggest education to focus [on] is educating our local market, our consumers, that local is right, because we can keep on creating these local pieces, but if people don't buy, it's pointless. If I had the kind of reception I had internationally in South Africa, imagine what that would do for my business? Let alone the race issues we have in this country – we need to deal with that too, as it kills the spirit of being creative in this country. The worst thing is the influx of imports – that's what is killing us.

22:33 For example, at the moment, there's a government initiative for overseas showcasing…… (23774:24343) - D 22: Participant 11

For example, at the moment, there's a government initiative for overseas showcasing, but we've got our own plans. However, they've come up with this and we want the market but we didn't budget for it. Now we have to pull out this collection of maybe twenty looks for marketing purposes. A look is equal to jeans, shirt and a jacket, and we're looking for good quality because we cannot take any wishy-washy stuff to Europe. It must be top-of-the-range fabric, and make sure you meet the standards of the construction of the garment, because the fabric may be good quality but the cotton or thread may not be.

20:7 it came down to where to sell. One of the other challenges is they don…… (5201:5600) - D 20: Participant 20

It came down to where to sell. One of the other challenges is they don't understand the markets. There's no data out there to even know who their markets are. They're not doing their research, or MPBs to find out their research. They think they're going to opening up a pop-up and I'm going to make millions. That's not really their fault because where are they supposed to get this information from?

31:19 [14:31] We've been involved where they take you…… (8326:8734) - D 31: Participant 23

We've been involved where they take you to a fashion week in Europe and the government is paying for that, where we didn't do the ramp shows because we were too late, we did the expo. But that's nothing. A brand in a European store in Amsterdam going to the show is not going to buy from you the first time. They want to see you there again and again.

34:5 A lot of the time retailers will put into a collection and expect it t…… (2952:3539) - D 34: Participant 24

A lot of the time retailers will put into a collection and expect it to manifest income automatically, and what they don't do is lay the foundations as they would [for] launching a new product or a new brand. A lot of the time it's just put into an exciting store and expected to increase turnover, and that's not really how you start a business. The way you start a business is that you need to understand that it'll take two to three years for it to actually start making money, but in that time you're building a brand, you building collateral, you're marketing, and all those kinds of facets.

Code 6.12. Competition

One of the challenges that was not a major concern for most of the participants was competition. The statements below emphasised that competition was closely related to the high price points of local fashion designers, as larger retailers offered lower price points for similar products and the second-hand market offered designer clothing at lower prices. Plus, some statements highlighted that South Africans are exposed to many international high-end brands that have been in existence for a longer period, which means that they may have an established market share.

> *32:45 I think the challenge they may have had when they came to a big retailer i…… (23618:24254) - D 32: Participant 1*
>
> *I think the challenge they may have had when they came to a big retailer is volumes, though that is dependent on how a designer wants to work with us. Coming in as a brand, you may find that the pricing is much higher than our price points, which will be a challenge, as the pricing will not be competitive to what our customers are used to and may not sell.*
>
> *12:15 Competition becomes very strong, as we compete wit…… (8706:9118) - D 12: Participant 3*
>
> *Competition becomes very strong, as we compete with international brands, which is very difficult in the sense that price becomes very critical, while you deal with a lack of resources, equipment and technology, as we can't have certain finishes and so forth. Again, we're competing against brands that have been there for over a hundred years, while our industry is very young, with just under 25 years.*
>
> *14:10 In SA, you have to scratch and find people who're willing to spend…… (3820:4329) - D 14: Participant 5*
>
> *In SA you have to scratch and find people who're willing to spend like that because South Africans have access to multiple brands, high-end and low-end, and people can just easily get it. In other African countries, when you go to a high-end retail store, it's hard to find that type of offering, and you don't get the product anywhere else, and that's what we love as a brand. So we're slowly re-channelling the brand to just high-end to the whole supply chain, which is very niche because we can push a particular price point.*

22:13 most of people who are doing fashion now when you ask them, they want…… (8733:9392) - D 22: Participant 11

Another thing that's killing the fashion industry and the economy of clothing in SA is second hand. The clothing on the street, first of all, they're very good quality – they call them vintage clothing. Some of them are from the '50s, '60s, '70s and they're in very good condition. So what's the point of going to a boutique to buy it? Where you could get a dress that costs thousands of rands, on the street you pay about R30. There, when you buy a shirt, it's a good-quality shirt, it's a pure-100%-cotton shirt, the style, fit, embroidery, quality – top of the range. If you buy a blazer or jacket there, if you need a trench coat, what's the point of going to a South African fashion designer and pay R10 000 for it, where you could get it on the streets for R150? You dry-clean it, it comes back new.

5.3.3.2. Code 7: Retailers' Challenges with South African Fashion Designers

The statements below take into account the challenges and pressures experienced by both South African fashion designers and retailers at the retail front and not necessarily during the supply-chain process. Communication barriers were one of the challenges which were found from both the retailers' and the local fashion designers' points of view. The consignment- or concession-model challenge was also mentioned, which means retailers would contract the fashion designers to supply them with their product ranges and only pay the fashion designers a certain percentage for the products once they had been sold in-store, and should certain items in the product range not be sold, the retailers would often return the merchandise to the designers, which resulted in loss of revenue. Other challenges included the level of commitment from local retailers to work with South African fashion designers, overseas production by local retailers, the absence of a national fashion council in South Africa, and local retailers' expectations of South African fashion designers.

First, it was revealed that both South African fashion designers and retailers encountered communication barriers when working together. Participants found that the communication from retailers towards local designers was complicated and "blanketed", with limited support and limited expressed expectations from retailers. The participants further revealed that the communication from South African fashion designers to retailers exposed a lack of honesty or understanding of their business capacity to produce for the retail industry.

32:35 Again, this second company outsourced our contract to another supplier…… (19086:19290) - D 32: Participant 1

Again, this second company outsourced our contract to another supplier, then the products arrived with quality issues as the subcontractor was never vetted, then the orders were cancelled because of that. This was due to poor communication, which led to misleading by the suppliers, who didn't tell us what they problem areas were, which we would've found a way to support them through those problem areas. But we work closely with a consulting company, so if the problem was funding, we could've gone to some of our partners to assist them with funding.

14:49 All these things become blanketed as if you know, but they forget that…… (22026:22516) - D 14: Participant 5

All these things become blanketed, as if you know, but they forget that designers don't know, as I know how to do invoicing in my office but I don't know how you do your invoicing, I don't know whether you pay me in thirty days or sixty days. Then you slap me with a sixty-page contract I have to read that is put together by someone sitting in your legal department that has nothing to do with design or anything, then when those things are not put in place, obviously the industry isn't going to thrive.

17:23 I think the biggest problem designers have is they do not communicate…… (14624:14812) - D 17: Participant 8

I think the biggest problem designers have is they do not communicate properly with the businesses they're trying to influence, whether it is significant manufacturers or retailers.

Local retailers' commitment to work with South African fashion designers was then questioned, as the retailers appeared to use South African fashion designers as marketing tools to appease a certain mindset, rather than working with them as business associates. The concession or consignment model came under scrutiny by some participants, as they stated that the model had not supported the local fashion designers' cash flow and finances, while it demonstrated a non-collaborative relationship between South African fashion designers and local retailers.

21:18 on the retail side is where it all falls shorts because all concession…… (8326:8605) - D 21: Participant 21

On the retail side is where it all falls shorts because [of] all concession models, like, if I take them to a boutique, the boutique wants them to put their garment in the store, and when it's sold they want to take 20/30%, but the funding for designers are put into stores until it sells.

34:8 A lot of the time the local design has been put in these spaces to appease…… (4048:4367) - D 34: Participant 24

A lot of the time the local design has been put in these spaces to appease a certain mindset, but I don't think it's done with the intent of actually making money from it, and that's scary for those who are studying to be fashion designers. I'm saying retailers but I'm specifically speaking about South African retailers. A lot of [the] time when retailers bring fashion designers on, it's not in a collaborative manner, it's in a commission manner, so they take more of an autocratic approach, where they will tell you what they want and you'll do it, which for me is problematic because you're not getting the best out of the creative person.

It was then revealed by some of the participants that the lack of a national fashion council had caused a number of challenges. First, retailers found it difficult to track or to scout fashion designers to work with, as there was no necessary data available, which could have been made accessible for retailers by a national fashion council. Second, the local retailers had not considered a "common and collective strategy" due to the competitive nature between them, and this required interventions from government sectors to shape a business model between the South African fashion retail industry and retailers. However, a fractured national fashion council had not been able to achieve this.

32:16 I think we're going to struggle a bit I other provinces as it is easier…… (5109:5279) - D 32: Participant 1

I think we're going to struggle a bit to procure fashion designers in other provinces as it is easier when you have the fashion councils, but we may need to work closely with many designers who're there.

17:12 the issue is that there isn't a common and collective strategy as yet…… (7460:8108) - D 17: Participant 8

The issue is that there isn't a common and collective strategy as yet, in part because on some levels it's seen as a competitive element by the individual retailers; in part because there hasn't been enough of a driving element from the likes of the wholesaler and retailer sector, or even the likes of the clothing and textile desk, to shape a business model for what can be collectively captured. The closest we got to that was with the national fashion councils, and they typically have not been able to define a good business model for why large retailers must support them, so the push and pull haven't been as it should.

Some of the participants also stated that the quantities expected by large retailers were too high to produce for SMMEs such as South African fashion designers. It was found that the price of differentiation appeared to be too high for retailers in the current slow economy. Given the economic climate, one participant mentioned that the challenge was that retailers were not brave enough to implement infrastructural, systematic and mind shifts to move towards differentiating themselves and counteracting the current economic challenges by being creative.

32:36 What I have picked up from my experience is that there needs to be a…… (19294:19527) - D 32: Participant 1

What I have picked up from my experience is that there needs to be a good balancing act when you're bringing in a small company and they take more orders than what they can fulfil, and I think that's where the biggest challenge is.

34:15 It is an infrastructural shift, it's a mind shift, and the more ventur…… (9157:10436) - D 34: Participant 24

It is an infrastructural shift, it's a mind shift, and the more adventurous and brave the businesses are, the more it is going to be successful. Given our economic climate, retailers have not been brave – they've been frightened, but that's just the opposite of what you should be doing. You can't do the same thing and hope that you're just going to sustain, because costs are increasing, running and manufacturing costs, and if you stay at the same level of thinking, then your costs are increasing but your mindset isn't increasing. There's a huge systemic shift that has to happen in a major machine. And that's the thing with corporates, especially those who have been in business for a number of years, [and] only work in a certain way, and for them to start shifting, altering and adapting takes a long time *and literally comes by permission from the top. If there's no permission from the top, then it just takes longer and longer to turn, so if there's no one driving it, it's literally a deadhead, and the people underneath can't do anything to shift it. They can continuously vocalise but unless there's a brave leader it's not going anywhere. Unfortunately, in most cases, we have to wait until it hits them where it hurts the most, which is the money, for it to get more creative.*

While retailers were manufacturing most of their products in China, they found that procuring products from overseas affected their desired fast-fashion models. At the same time, it was noted that investors (such as retailers) required to see profits continuously, and this was perceived by other participants as unsustainable for South African fashion designers. Moreover, the shift to overseas production by retailers created unemployment within the clothing supply chain, which then created a negative ripple effect, resulting in the loss of skilled workers, then the loss of taxes, and finally a negative effect on the economy.

17:16 When you own your own business you don't mind if in year three, your p…… (9814:10683) - D 17: Participant 8

When you own your own business, you don't mind if, in year three, your profit is zero or sometimes even negative, as long as you're clear of what kind of expectation of profitability exist in year five, six and seven, whereas investors want to see profitability continuously.

34:24 I mean it's because we haven't had manufacturing here for a very long…… (16342:17205) - D 34: Participant 24

I mean, it's because we haven't had manufacturing here for a very long time, and as a result, it's not just the seamstresses that lost their jobs, it's the people that repaired the machines, that serviced them, the electricians, all of those kinds of people, and I think that's where these retailers, by exiting and going to get manufacturing elsewhere, are now starting to feel the pinch of the ripple effect. It was so reactionary and there was no foresight of it at all, of the profound ripple effect it may have on the business as a whole, that now we have to react to that instead of actually taking a breath and saying, we might actually have to bite the bullet in this recession, but once it's happened we can rebuild from that. Instead they just exited as quickly as they could, and now they're having to rebuild, and they're not having qualified or skilled people.

34:6 I think in the same way retailers blame consumers for immediacy, they…… (3541:3714) - D 34: Participant 24

I think in the same way retailers blame consumers for immediacy, they want immediate profits, and that's not sustainable. There's no longevity in any of those two situations.

5.3.3.3. Code 8: South African Fashion Designers Weaknesses Managing the Supply-Chain Model for the Retail Clothing Industry

Codes six and seven concentrated on the external challenges of South African fashion designers in the retail clothing environment, while code eight focused on the internal weaknesses of South African fashion designers with regards to managing the supply chain for the retail clothing industry. The weaknesses mentioned by participants included: quality standards, quality measures and technical understanding, which required attention to design detail; the degree of knocked-off designs within the fashion and retail industries; unsuitable pricing strategies for high-end brands and an inability of certain fashion designers to plan and strategise towards a functional fashion business dream or vision; inconsistent creative input from several fashion designers; ego-driven attitudes among some fashion designers; limited offering of basic or staple designs by South African fashion designers; poor customer service, ownership and management by a number of fashion brands; lack of specialisation or focus towards brand offerings; and the under-valued uniqueness of African and South African design by local fashion designers and retailers.

- Quality standards, measures and technical understanding:

  11:30 quality, not just our brand but I look at a lot of brands and they're…… (21515:21609) - D 11: Participant 2

  Quality – not just our brand, but I look at a lot of brands and their quality is not fantastic.

  24:18 Our failing here is our technical ability. My first deg…… (18825:19348) - D 24: Participant 13

  Our failing here is our technical ability. My first degree is in architecture. For half my life I thought I was creative, and I can tell you that the struggle in terms of understanding the technical side is a real struggle. You'll find that creatives dismiss it, but they dismiss it because it's a struggle to understand it. It's not simple.

- Knock-off culture:

  13:18 Copying each other! You'll be sitting at one show, wondering if that i…… (14043:14226) - D 13: Participant 4

  Copying each other. You'll be sitting at one show, wondering if that is the same show, but it would be a different show. They copy each other a lot. I believe design should be unique.

- Business planning and strategising:

  14:2 I've seen people launch themselves at a very low end and ultimately no…… (926:1137) - D 14: Participant 5

  I've seen people launch themselves at a very low end and ultimately not becoming that high-end product they wish to be. The moment people started raising their prices, that's the moment people started running away.

  18:16 the weakness of designers is often getting caught up in the dream with…… (9450:9762) - D 18: Participant 9

  The weakness of designers is often getting caught up in the dream without understanding. It's almost like the dream of what they've been thinking it's going to look like visually. And maybe a weakness, sometimes and often, is not thinking about the numbers, what they're going to have to spend to create that vision.

  27:12 planning ahead. I just feel like designers don't plan ahead; they don'…… (8017:8805) - D 27: Participant 16

  Planning ahead. I just feel like designers don't plan ahead; they don't do sufficient trend analysis, research, planning. That is a weakness. They seem to just want to be reactive – rushing. For example, with training, our designers for some reason they think they know it all. Or a person thinks just because they went to technikon or wherever, they've got their diploma, then they think that they are experts, and when you organise training, they're like, can you just give me money already? I know the technical aspect, just give me the money, and don't give me training. But you can never get to a point where you are overqualified, overeducated. It's a consistent thing you learn all the time.

- Consistency:

  16:21 What some guys do they can do one collection, two collections, third co…… (11953:12210) - D 16: Participant 7

  What some guys do, they can do one collection, two collections… The third collection, they're flat. They want to deal with a brand that's been consistent through the years, and they know it's not going to drop them, they're going to keep on coming with new designs. So their weakness is consistency.

- Lack of staples or basic designs:

  19:26 maybe that's a design thing as well, do our designer know how to creat…… (22340:22753) - D 19: Participant 10

  Maybe that's a design thing as well. Do our designers know how to create a basic item that says, that basic T-shirt or that simple white shirt is mine because of such-and-such detail? A lot of the designers don't want to play in that game or space of creating a range that is slightly more commercial and sellable, and they could use the other as marketing creativity. Because every designer does that across the world.

- Customer service:

  20:15 Ownership of their brand, quality. With lack of ownership of the brand you …… (14108:14390) - D 20: Participant 20

  Ownership of their brand quality. With lack of ownership of the brand you find that, once a product has left the doors, they're not willing to take it back and say, that's my issue or fault, let me replace it for you.

- Value proposition:

  28:29 I don't think that SA designers understand their value, especially now…… (22355:23517) - D 28: Participant 17

  I don't think that SA designers understand their value and how to capitalise on that, especially now when the world has their eye on SA and Africa. I think there was always this perception that we needed to be international or of a European standard. It's becoming very clear that that's not what people want. It's almost like, who are you, and shout about it. I think that there's a lot of SA designers that do that, where they're telling stories, and it's their story to tell and it's exciting to hear it and watch it and seeing the whole thing unfold, and it's beautiful. I think it's a weakness and a strength. I think that there are people that do *tell their story and that's the strength. But there's a lot of designers that still have this idea that it needs to be European and it mustn't. It's counterproductive. You know what it is? Because there's so much, we live here, we see every day. You want something else. You want something that's almost unattainable, it's too far away. So that's why this inspiration, it doesn't need to be that. You've got this melting pot of incredible inspiration, reference, etc.*

26:9 But the problem is they are looking down on the seamstress work as……. (6891:8209) - D 26: Participant 15

But the problem is they are looking down on the seamstress work as if it's for older people, so we are now motivating for that side of work.

- Designer ego:

  17:5 What you need to have and the big challenge here is ego (4525:4550) - D 17: Participant 8

  What you need to have, and the big challenge here is ego. It's the same challenge that I expressed earlier with academia: everyone wants to be the standard, the smart person in the room. The most peculiar, most critical part about being a successful designer is learning to integrate the multitude of elements that exist around you, something that matters to someone who is going to appreciate it, and by extension, be willing to pay money for it.

  26:6 Designers when they start designing and then they see somebody wearing…… (5392:5854) - D 26: Participant 15

  Designers, when they start designing and then they see somebody wearing their clothes, or they're known that they are now at a big retailer, they think they have arrived. Then their heads swell. They do not care about the manufacturing side of things, they do not care about liaising or communicating – the quality, taking care of the clients. Their attitude – the attitude is the biggest killer. That's why they are not growing much.

  31:17 But if their life is off the rails or if they're chasing media and…… (7280:7691) - D 31: Participant 23

  But if their life is off the rails or if they're chasing media and fame, there is a point at which education is not getting through. The big challenge here is ego.

34:26 There's a certain amount of ego that comes into play with fashion desi…… (18565:18813) - D 34: Participant 24

There's a certain amount of ego that comes into play with fashion designers that is kind of almost unwarranted. I think that it is just a job, and I think with social media there's this blur of what it is and who you are, but what it is is still a job.

5.4. Chapter Summary

This chapter provided a comprehensive analysis of the data that was collected during the study. It is more than apparent that South Africa is a developing country with an increasing number of fashion design SMMEs. The local fashion designers managing their own SMMEs were found to work in minimal volumes when supplying the retail clothing industry, thus their business and support structures were significantly small; this was discovered with the first code group.

A commonality was found in the second code group, as South African fashion designers' timelines appeared to adhere to the JIT approach rather than the fast-fashion model. Additionally, the second code group confirmed that South African fashion designers required extensive support with regards to managing the retail supply chain. Though a fraction of the fashion designers interviewed had all the required support, the other portion attempted to manage their supply chain for the retail industry with limited support and resources.

Code group three described the challenges South African fashion designers experienced with regards to the management of the retail supply chain, which were funding, cash flow, fabrics, CMTs, skills, knowledge, business acumen, market access, human skilled resources, quality, fragmented industry, costing, marketing, competition, technology, low barriers of entry to the fashion industry, consumer perceptions, trade rules, legislation, policies, false or misleading claims regarding local production, and lack of foreign investment in the country's value chain.

These challenges revealed fundamental problems that required carefully considered recommendations and solutions.
The next chapter discusses how the findings outlined in this chapter relate to literature, in order to fully address the recommendations of this research study.

CHAPTER SIX: DISCUSSION ON FINDINGS

The previous chapter examined the data-analysis process and detailed the findings of this research study. This chapter aims to discuss the findings from Chapter Five in relation to the research objectives and the literature review that was outlined in Chapters Two and Three.

As presented in Chapter One, the problem identified for this research study is that a number of South African fashion-designer brands struggle to maintain longevity and success within the retail environment. As a result, this research study sought to answer the main research question: what is the most effective supply-chain-management model for South African fashion designers to function within the retail clothing industry? Subsequently, the main objective was to develop an effective and sustainable supply-chain model for South African fashion designers in the retail clothing industry.

To answer the main objective, three supporting objectives emerged, which in turn formed three code-groups – designers and retailers supply-chain-management model structures and capacity; supply-chain-management model processes; and supply-chain-management model challenges experienced by South African fashion designers in the retail clothing industry. The findings of each of these code-groups are discussed in the context of the literature used for this research study.

6.1. Objective 1 (Code-Group 1): Evaluating the Business and Supply-Chain-Management Structures of South African Fashion Designers in the Retail Clothing Environment

Objective one aimed to answer the questions supporting the business and supply-chain-management structures of South African fashion designers in the retail environment. The main question was: what are the business and supply-chain-management structures of South African fashion designers in the retail clothing industry?

The main question was supported by three sub-questions:

- What are South African fashion designers' business and supply-chain-management-model structures and product type when producing for retail?
- What is the production capacity of South African fashion designers in retail?

- What are the business and supply-chain-management structures and capacity of retailers working with South African fashion designers?

6.1.1. Code 1: Business and Supply-Chain Structures and Product Types of South African Fashion Designers

The first sub-question from this code group was referred to as code one. The findings confirmed that different product types would require different supply-chain-management models. These findings are in agreement with Ayers and Odegaard (2017:6), who pointed out that supply-chain models would differ as a result of business structures, product variations and consumer preferences. Furthermore, the lean, agile and leagile supply-chain-management strategies were considered, as one supply-chain strategy would not apply to all product types and industries. Hence, each industry requires a modified supply-chain strategy suitable for a specific product family, product market and product demand (Christopher et al., 2006:286).

Within the first sub-question it was also discovered that most of the fashion designers interviewed initially specialised in high-end bespoke or tailoring brands. In consensus with these findings, Corporate Intelligence on Retailing (1997, cited by Fernie et al., 1998:366) recognised the contemporary studies reflecting that fashion-design houses and couturiers (the most elite and high-end type of fashion design from France) are the most auspicious of global fashion-clothing retailers. Additionally, Fionda and Moore (2009:348) indicated that luxury brands are the most highly considered brands by consumers throughout the world, with product groups such as couture, RTW and accessories. Most recently Strydom et al. (2015:111,112) characterised the fashion industry in South Africa as highly competitive, particularly in the high-end fashion retail sector, which is mainly influenced by fashion designers, creative industries and global trends.

The high-end bespoke-tailoring fashion designers interviewed categorised their ranges for retail as RTW or diffusion lines. Pavit (2010:98) underscored that products such as perfumes, accessories and RTW diffusion lines bridged the gap between expensive high-end fashion garments and affordable mass-market goods. Druesedow (2010:591) identified that RTW designers are located in numerous locations around the world. Farber (2010:131) further exemplified South African fashion designers, such as Sun Goddess, Stoned Cherrie and Strange

Love, as meticulous designers, with unpredictable designs, which represent a balance of diversity for South African cultures. Streetwear and leisurewear fashion designers were among the group of participants interviewed found in the retail clothing industry.

However, in an interview with one of the participants, it was mentioned that a number of fashion designers are not creating ranges that are highly commercial and sellable. The participant further exemplified an international retail store with a three-storey building, on the top floor of which the smallest department was found, with highly creative and over-the-top catwalk ranges, but when exploring the floors below, beautiful basics such as T-shirts, shirts and knitwear were found; so the catwalk would then be used as a marketing platform for introducing, affirming and selling the brand's DNA. That said, the participant believed that beyond the supply chain, fashion designers needed to change their thought processes about how they create and build sustainable brands. Supporting this statement, Malem (2008:403) enunciated that "fashion is creativity, but it also means being very aware of the industrial and commercial aspects".

Rajendran (2012:1) stipulated that one of the manners in which fashion designers differentiated themselves and consumers individualise themselves was through streetwear, while Chang et al. (2017:92) referred to streetwear fashion as a distinguishing factor for the different cities around the world, as streetwear was an everyday dress code noticed on people walking the streets of those cities. So, though high-end fashion designers were the predominant feature during the interview proceedings, there were a few streetwear and leisurewear fashion designers interviewed.

With the leisurewear and streetwear fashion brands, it was found that their supply-chain structure was a lot more diversified and somewhat complicated, as they worked with several firms in various countries or provinces. Throwing caution on these findings, Fernie and Sparks (2009:5) recommended that the key factors in management are to ensure that product availability is easy and maximises the efficiency of the supply chain. Roberts and Thoburn (2004:128) recognised that product availability is an issue in South Africa, as a significant portion of fabrics and yarns used are imported because the domestic fabrics and yarns found in South Africa are perceived as more expensive than the imported equivalents, even after duties have been applied. In agreement, Burke (2013:47) elucidated that fashion businesses have increased their outsourcing to gain competitive advantage and lower manufacturing costs, while reducing internal capital expenditure on training, supervision, workforce and non-core equipment and systems.

Considering the abovementioned findings, South African fashion designers' product types could be classified as diverse, ranging from high-end designs to leisurewear and then to streetwear. Similarly, Kesper (1999:143) previously noted that the South African clothing industry is very diverse, outfitting from basic garments to high-fashion bespoke garments. Fashion brands' economies of scale are built by a distinct image in order to gain differentiation (Richardson, 1996, cited by Malem, 2008:400). Sen (2008:571,573), in agreement, emphasised that the fashion industry globally is considered to have a short life cycle, irregular demand and a large variety of products that consist of fashion products, seasonal products and basic products, with inspiration taken from African techniques and cultures, just as African designers have been influenced by Western trends, materials and techniques.

Posner (2015:10) articulated in detail the diversified product ranges closely linked to South African fashion designers, by defining the fashion market sectors for clothing and apparel, which were menswear and womenswear, with womenswear styles categorised as evening wear, formal work and office wear, weddings and occasional wear, contemporary fashion, casual wear (also referred to as leisurewear), denim, streetwear, resort or cruise wear, sportswear, slouch or loungewear, and lingerie; while menswear styles were categorised as bespoke tailoring, formal work and office, wedding and occasion, contemporary fashion, casual wear, denim, streetwear and sportswear.

Though South African fashion designers were found to be diverse, one of the common features identified was that they desired to maintain the perception of the exclusivity, luxury and high quality of their designer ranges while maintaining local production. This is in close association with the slow-fashion guideline, which stipulates that local production is a key feature in the slow-fashion supply chain because a shift occurs from quantity to quality as the pace is slowed down (Johansson, 2010:86).

6.1.2. Code Two: Product Capacity of South African Fashion Designers in Retail

One of the most important factors to note is that the fashion designers interviewed were all entrepreneurs, which meant that most business and supply-chain-management decisions were predominantly based on their knowledge of the business, the potential markets and the ability to produce for those particular markets. Granger and Sterling (2012:2) comprehensively defined fashion entrepreneurs as individuals who;

> *recognise an opportunity. They size up its value as well as resources necessary to make that opportunity a success. They are visionaries. They have a vision of how the business will grow, and they have the drive to make it happen. Fashion entrepreneurs are always looking for better and innovative ways to find new markets, to add to an existing product line, and to tap into larger geographic territories. They are futuristic in that they anticipate and embrace change. They see different ways of doing things.*

The findings revealed that South African fashion designers worked with one to five different retailers, unless their business capacity had grown to allow successful forward integration for the fashion designer to operate as a retailer. Masteika and Čepinskis (2015:832) mentioned that the uncertainties and complications of supply-chain-management models required new integrations within the supply-chain-management model, including the forward and backward flows. It was evident that the fashion designers interviewed had linked their business capacity, product type and the type of retailer to supply. Similarly, Lee (2010:596) posited that retailers were classified based on their retail mix, which involved the type of merchandise sold, the price of the merchandise, the merchandise assortment, and the level of customer service.

With regards to units, the recurring factor from the participants was that South African fashion designers preferred to work with minimum quantities. Lindgren et al. (2010:604) also discovered that it was common practice for established Australian fashion designers to work with quantities of about one hundred units per style, while the established South African fashion designers interviewed worked with quantities between of fifty and five hundred units per style, depending on the product type.

6.1.3. Code Three: Capacity of Clothing Retailers Working with South African Fashion Designers

To determine the capacity of clothing retailers that worked with South African fashion designers, first the type of retailers that worked with local fashion designers were considered, as different retailers will have varying capacity. Lee (2010: 597-598) explained that department stores were large-scale retailers with a wide and in-depth variety of merchandise, while speciality stores carried narrow but deep ranges in specific categories and tailored assortments, and boutique stores were smaller in size with top-of-the-line ranges that concentrated on niche, narrow and specific merchandise.

The findings revealed that South African fashion designers worked predominantly with department stores, independent retailers and boutiques. Retailers such as Polo, Edcon, Woolworths, The Space, Luminance, Saks Fifth Avenue and other international retailers were among the retailers mentioned by participants. Though fashion designers had not been previously linked with specific retailers in literature, Diamond and Diamond (2004:4-16), defined brick-and-mortar clothing retailers as speciality stores with restricted product classifications, department stores that group their products according to similarities and brand names, fashion manufacturer outlets for independent fashion designers and manufacturers, boutiques that are emporiums that offer an assortment of premium fashion at smaller quantities for exclusivity, and designer stores that are operated and run by fashion designers. Additionally, Lee (2010:597) outlined that electronic retail (e-tail) platforms or online stores were referred to as “non-store retailers”; and South African fashion designers were found in e-tail platforms such as Zando, Superbalist and independent online stores under the fashion designers’ brand names, in addition to international online stores.

To designate fashion designers to work with, retailers were found to make use of their usual buying and planning departments. In addition, other retailers were found to work with business consultants, agents and/or trend analysts. Retailers were also found to allocate the management responsibility of South African fashion designers to their existing retail departments, such as the planning departments, buying departments or operational managers. Still, some participants mentioned that they found the communication and information flow with some retailers to be one-sided, with limited input for or consideration of the fashion designers’ business structures and capacity. Contradictory to the model discussed by participants, Ferdows et al. (2005:1) attributed the success of the Zara supply chain to well-designed operational structures, performance measures and office layout, which allowed for easy information transfer.

It was found that most retailers did not fully integrate South African fashion designers in their supply-chain models, but rather worked with them as “independent” suppliers. Nonetheless, the visibility of local fashion designers, together with local fabric production, was still marginal in retail. Though no literature was found to support these findings, in an interview with one of the participants, it was mentioned that retailers often failed to work with fashion designers in a collaborative manner, but rather worked with local fashion designers on a commission basis, which meant that the retailers would take more of an autocratic approach, resulting in reduced creativity from designers. Furthermore, the participant reiterated that retailers also failed to lay the relevant foundations and support for fashion designers, as they would when launching a new product, but would rather expect a design collection to manifest income automatically, without the necessary marketing and required resources.

With the gradual growth of local production and supplier procurement, the retailers and retail agents/consultants that assisted fashion designers with access to market indicated that, though the model required fine-tuning, there was still capacity and opportunity for additional fashion designers to work with them.

Lambert et al. (1998:5) recognised that supporting members are relevant within the supply-chain management-model, as they are those entities that provide resources, knowledge, utilities and/or assessments. These are discussed in more detail in the following code-group.

6.2. Objective 2 (Code-Group 2): Processes and Timelines of the Supply-Chain-Management Model for South African Fashion Designers in the Retail Environment

Objective two aimed to answer the questions regarding the supply-chain-management processes and timelines for South African fashion designers in the retail clothing industry. The main question was supported by the following sub-questions:

- What are South African fashion designers' timelines and lead times when producing for the retail clothing industry?
- Who are the South African fashion designers' supporting members within the supply-chain-management model?

6.2.1. Code Four: Timelines and Lead Times of South African Fashion Designers in the Retail Clothing Industry

Code-group two sequentially sought to answer the question regarding supply-chain-management timelines for South African fashion designers in the retail clothing industry. The findings established that different product types required different timelines. This finding was corroborated by Christopher et al.'s (2006:286) observation that one supply-chain strategy will not apply to all product types and industries, hence each industry required a modified supply-chain strategy, suitable for a specific product family, product market and product demand.

Additionally, it was found that the supply-chain-management process took South African fashion designers between two and ten months for complete production, when considering fabric production; but once the fabric was available, it was found that it took South African fashion designers one to six weeks to manufacture product ranges ready for the retail clothing industry. One of the participants mentioned that "there was always fires to be put out during the day", while another participant revealed that "we tell our clients twelve weeks because it just gives us a four-week buffer of things going wrong". Christopher and Peck (2004:13) advised that for uncertain industries, such as the fashion industry, the agility model is essential for a resilient supply-chain-management model, as that would afford entities the ability to respond efficiently to unpredictable situations.

In agreement with Christopher and Peck's deduction, this study also found out that South African fashion designers found local production to be of high importance to the agility of their supply-chain-management model. Though most participants were satisfied with their time frames, considering the lack of availability of resources in close proximity, such as fabric and manufacturing facilities, according to Sirilertsuwan et al. (2018:1346) the best approach was to have close-proximity clothing manufacturing and resources, as that advanced sustainability while benefiting the bottom line.

Notably, the agile supply chain in the past was concurrently associated with QR (Stratton & Warburton, 2003:184), which is a set of innovative processes designed to reduce the manufacturing cycle timeframe, initial production commitments and inventory levels (Richardson, 1996:401). QR further facilitated shortened lead times while maintaining low costs (Bhardwaj & Fairhurst, 2010:165), which was found to be in direct contradiction to South African fashion designers' preferred lead times and the cost of their premium garments. With regards to longer lead times, the findings revealed that South African fashion designers preferred to work with their current lead times or longer lead times, which allowed for the research phase to take place well in advance and for sufficient communication to take place with CMTs, fabric suppliers/producers and retailers. With regards to premium garments, it was found that retailers expected South

African fashion designers to supply premium high-quality designer ranges, which would last longer than "normal" retail clothing with a lower price range. Over and above that, findings confirmed that fashion designers also preferred to produce premium designer ranges regardless of the style, as that was their differentiating factor within the retail environment.

South African fashion designers were found to apply the JIT model to their supply-chain model. In an interview with one of the participants, it was stated that JIT was an important factor in the production decision-making process. According to Ali Smadi (cited by Chiromo et al., 2015:1968), JIT is a concept associated with continuous and compulsory problem solving, ensuring that the customer's demands are supplied accordingly, timeously, without waste and with ongoing improvements. This definition is closely linked to the uncertainties previously mentioned by other participants.

Participants named the following processes that contributed to their supply-chain management time frames for the retail clothing industry (this is in no particular order):

- Research, which included participation in international and national fashion, textile and clothing-related shows
- Sourcing of fabrics, trimmings and finishings
- Purchasing of fabrics, trimmings and finishings
- Design process (prints for garments or full garment)
- A sampling of designs or prints
- Finalising designs or prints
- Finalising the design mix
- Marketing, which included trade shows, fashion shows and visual merchandising concepts
- Retail preparation, which included final production and transportation processes

The abovementioned supply-chain-model components are closely related to the supply-chain model by Burke (2013:20), who outlined that the supply-chain model for the fashion and textile industry started with the acquisition of textiles, followed by fashion-trend forecasting, then the steering of the fashion-design process, then manufacturing and distribution, followed by fashion sales and marketing, and finalised with the product being made available at retail outlets for customers to purchase.

6.2.2. Code Five: Stakeholders Support for South African Fashion Designers' Supply Chain Management Process

The code five pertained to the issue regarding the supply-chain-management support South African fashion designers obtained from various stakeholders. The participants interviewed were found to support South African fashion designers' management of the supply-chain process through marketing efforts, distribution or providing market access, mentorship, and through the provision of skills and knowledge. The stakeholders identified were the following:

- Government departments such as the Department of Arts and Culture and the DTI
- Fashion councils, which are funded by government departments
- Retail stores
- Retail agents or consultants
- Educational institutions
- Well established fashion designers

However, it was found that this support was fragmented, and few stakeholders communicated among each other regarding the best efforts in supporting fashion designers' supply-chain-management activities for the retail clothing industry. For example, at the government level, there was no collaboration established between the Department of Arts and Culture, the DTI and the Department of Small Business Development regarding the best efforts or collaboration in supporting South African fashion designers in achieving economic sustainability and efficiency in the retail clothing environment.

The communication between large department stores and fashion designers also appeared to be fragmented, as the buying and planning departments, and the procurement and legal departments, communicated separately with fashion designers, in turn creating communication barriers.

The best communication practices were found to be between clothing retailers and educational institutions. However, the demand for skills and knowledge from clothing retailers appeared to surpass the supply of skills and knowledge offered by educational institutions.

It can therefore be argued, based on the findings and the supporting stakeholders interviewed, that the major challenge with the support of the supply-chain-management processes of South

African fashion designers in the retail environment, is a lack of communication and flow of information, and not a lack of supporting entities or stakeholders. Ferdows et al. (2005:1) concurred with this finding when they attributed the success of the Zara supply chain to a consistent exchange of information from customers to store managers, from store managers to market specialists and designers, from designers to production staff, from buyers to subcontractors, and from warehouse managers to distribution.

Christopher and Peck (2004:13,17) advised that the way forward in creating a resilient supply chain is through high-level collaboration between entities within the supply-chain-management model. Recognising this need for collaborations, Ayers and Odegaard (2017:12-13), in agreement, pointed out that collaborative relationships are necessary within the organisational structures to, first, support external collaborative relationships; second, through forging up and down supply-chain partnerships with trading partners to gain competitive advantage; and, third, through managing supply-chain information by means of technological advances. In support, Birtwistle et al. (2003:118) found that in order to achieve further collaborations, raw-material suppliers, manufacturers and retailers ought to create long-term relationships to reduce manufacturing time-frame and distribution processes.

6.3. Objective 3 (Code-Group 3): Challenges South African Fashion Designers are Experiencing in Managing Their Supply Chains for the Retail Clothing Environment

As objective two answered the questions regarding the supply-chain-management processes and timelines for South African fashion designers in the retail clothing industry, clear challenges emerged from the discussions. Therefore, the purpose of objective three was to determine the challenges that South African fashion designers experienced throughout the supply chain when producing for the retail clothing industry.

The main question for this code-group was, what are the key supply-chain challenges experienced by South African fashion designers in the retail clothing industry? This question exposed the South African fashion designers’ weaknesses (which required specific support) and outlined the challenges retailers experienced with South African fashion designers.

This section discusses the three individual codes as a code group.

6.3.1. Code six to eight (Code-Group 3)

As implied, code six was the anchor of the third objective, which overarched all the discussions under the third objective. The aim of code six was to answer the question regarding the supply-chain-management challenges South African fashion designers encountered within the supply-chain network for the retail clothing industry. During the interview proceedings, the challenges that emerged were cash flow and funds, fabric, CMTs (product manufacturing), skills and knowledge, business acumen, market access or distribution, human skilled resources, quality, fragmentation, costing, marketing and competition. Technology, low barriers of entry to the fashion industry, transition into retail by high-end designers, and the challenges with trade rules, legislation and policies were among the less-frequent challenges mentioned during the interview processes.

Literature and empirical studies have also identified a number of these challenges in the past. One of the most frequently mentioned challenges by participants was with regards to cash flow and funding. Druesedow (2010:591) pointed out that the production of RTW garments was labour intensive, but the initial production required less capital and technology than other businesses. The findings of this research study presented opposing statements to Druesedow’s assessment, as participants acknowledged that more capital was required when producing RTW products for the retail industry and the management of the supply-chain process.

A few other participants contradicted Druesedow’s evaluation, which suggested that the initial RTW production required less technology. Participants recognised that one of the major challenges within the supply-chain-management process was the development of technology within the design and manufacturing sector in South Africa. In support of this argument, Tobler-Rohr (2011:46) also affirmed that technology and quality are acceptable parameters to support the flow of material within the textile supply chain, as functions such as spinning, weaving/knitting and finishing typically take place at a single facility, with the finishing process undertaken by a subcontractor.

Closely linked to technology were the manufacturing challenges, which were mentioned more frequently by participants. Both product manufacturing and textile manufacturing were the two frequently mentioned challenges, after cash-flow and funding challenges. In line with these findings, Fin24 (2018) published an article stating that the South African clothing-manufacturing industry was not without its risks and challenges. One of the major challenges found with manufacturing was the unwillingness of manufacturing facilities to assist South African fashion designers with their marginal units. Entrepreneur Magazine (2018:6) acknowledged this challenge for South African fashion designers by affirming that since the closures of manufacturing mills during the late 1990s, it had become increasingly difficult to locate reliable manufacturing facilities in South Africa willing to produce the minimum units South African fashion designers often required.

The challenge with fabric was that the acquisition of fabric consumed the most time, as most fabrics were not readily available in South Africa to achieve consistent bulk productions required for the retail clothing industry. According to research conducted by the Textile Federation (2007), the South African textile industry encountered challenging trading conditions, with decreasing employment due to the shutdown of textile mills in the early 2000s, forcing the retrenchment of staff, as there was an influx of imports: a 29% increase of imports between the years 2001 and 2006, from 77 000 to 99 000 tons, and an additional 500% increase for synthetic fabrics. More recently Fin24 (2018) established that foreign investment often bypassed the South African clothing-manufacturing industry to invest in neighbouring countries such as Lesotho, Swaziland, Madagascar and Mauritius.

Recognising the challenge with textile production, Roberts and Thoburn (2004:126) proved that globalisation did indeed exemplify its opportunities and threats through the textile industry, as the sub-Saharan African textile industry contributed to a significant percentage of employment in the manufacturing sector, so necessary adjustments in the local industry would have a significant effect on income and employment locally. As a result, Business Partners (2014) declared that though the South African textile and clothing industries were small, there were plans in place to assist in the utilisation of all the natural, human and technological resources available nationally to ensure that those resources became sought-after internationally. And government departments such as the DTI reported that there are operations underway to unveil new strategies to protect the local textile industry (Hans, 2019).

Conversely Burke (2013:47) underlined that in order to curb the production challenges, small-business proximity manufacturing required other small manufacturers specialising in a smaller niche market. The exorbitant prices local manufacturers charged South African fashion designers due to the minimal units was found to be one of the challenges experienced when working with local manufacturers. According to Jackson and Shaw (2001:137), manufacturers are compelled to be more competitive than ever, with pricing, design, quality, delivery and value for money as the current market exhorts pressure. Even so, local manufacturers have not recognised that increasing demand from a growing number of local fashion designers, which could potentially contribute significantly to the manufacturing business.

Concurrently, this study found that closely linked with textile- and clothing-manufacturing challenges were the issues of quality and pricing or costing challenges. Some South African fashion designers found that outsourcing to certain local CMTs compromised their quality, which in turn took away the justification for the premium pricing of their designer ranges. Furthermore, the exorbitant prices CMTs charged South African fashion designers affected the costing of the designer ranges by pushing the product costing higher than anticipated. Kaya (2011:168) likewise found that the challenges that were taken into consideration when outsourcing production to manufacturers or CMTs or textile suppliers included quality management, restrictions on capacity, reduced probabilities of satisfying due dates, disruption risks, discounting schemes, reliability, and flexibility of the selected suppliers.

One other major disadvantage mentioned by Burke (2013:47), and by some participants in this study, was regarding the communication barriers between the fashion designers and the manufacturers when outsourcing, though outsourcing locally enables the fashion designers to contract the manufacturers only when the need arose. One of the participants said, “I want to be in control of all of my touchpoints in the supply chain. It sounds nice, a one-stop wonder, but it hasn’t worked for us.” In agreement, Christopher and Peck (2004:15) pointed out that though it could be beneficial for one manufacturer to be responsible for the supply of a specific product to ensure high levels of cost and quality management, the “one-stop shop” could potentially pose a risk in terms of achieving efficiency. The participant further recommended that the principle of having a strategy that keeps a number of options open should be applied when developing a resilient supply-chain-management model.

It was found that marketing usually experienced disintermediation within the various supply-chain models of South African fashion designers. Barnes et al. (2013:183) highlighted the importance of marketing within the supply-chain-management model. The concept was also referred to as the “marketing philosophy”, with the philosophy characterised as the long-term position or overall vision for the entire business, including the business concept and operations. Taking this definition into consideration, it was noted during the interview processes that long-term positions or the overall vision and long-term position in retail, were often not considered by South African fashion design businesses.

Easey (2009:3) advised that fashion marketing strongly assisted the fashion value chain through marketing research, product management, fashion promotions, fashion distribution, and fashion production positioning, together with pricing. It was therefore found that closely linked with the challenges of marketing were the challenges with market access or distribution of products, costing or pricing, product management or stock control, and relevant brand positioning.

Recently Woolworths identified the need to support the South African design industry, by stating:

> Equal to our obsession with quality is our passion for design. We believe that design can make a real difference by contributing to our country's economy and helping solve critical challenges facing South Africa today. That's why, in addition to our longstanding sponsorship of Design Indaba, we're committed to enriching design education, mentoring young designers and supporting local talent. (Design Indaba, 2019)

Contrary to this statement, however, the findings revealed that the efforts to provide greater market access or streams of distribution for South African fashion designers were still quite conservative and limited with most retailers.

While Woolworths mentioned its commitment to enriching design education and the support of young designers through its mentorship programmes, it was found that some participants found the skills, knowledge and business acumen of South African fashion designers lacking. Recognising this need, Ayers and Odegaard (2017:12-13), in agreement, pointed out that there are limitations of needed skills to implement undertakings for the management of the supply-chain process, but that these limitations could be avoided through the implementation of collaborative relationships, first, within the organisational structures to support the external collaborative relationships, second, through forging up and down supply-chain partnerships with trading partners to gain competitive advantage, and, third, through managing supply-chain information by means of technological advances.

In addition to Woolworths, other retailers such as Big Blue have recognised the need to develop skills and provide market access for South African fashion designers. Through its website, Big Blue (2019) communicated that by working with local businesses, it aims to maintain local jobs for South Africans by providing independent entrepreneurs with ongoing skills development and market access through its retail stores and online platform, who would otherwise not have access to those mediums of retail. Edcon also introduced an additional phase to the Edcon Design Innovation Challenge, “21 Steps to Retail”, to advance skills development and entrepreneurship in the fashion and design sectors (Edcon, 2018).

Closely associated with skills are knowledge and knowledge flows through information. Christopher and Peck (2004:12) found that the limited exchange of information between adjacent entities within the supply-chain-management model created unforeseeable problems that could be avoided through the flow of information, while Seuring and Müller (2008:170) explained that the core essence of a sustainable supply-chain model was the management of material, information and capital flows, together with the collaboration between organisations along the supply chain.

This limited flow of information thus exposed the major challenge of fragmentation found within the clothing supply-chain-management model. Christopher and Peck (2004:1) noted that improved management and control of internal processes and information flow within and between the supply-chain entities would assist with the attainment of the ideals of a fully integrated, efficient and effective supply-chain-management model capable of creating sustainability. Additionally, it was suggested for retailers to take note of backward integration, as it was crucial in accomplishing the required margins, regardless of retail formats (Ayers & Odegaard, 2017:7). Masteika and Čepinskis (2015:831) suggested that for this “perfect” supply chain, the supply-chain-management model required the inclusion, coordination and collaboration of partners, stakeholders, suppliers, intermediaries, service providers and clients to plan and control supply-chain-management activities, while Fernie and Sparks (2009:11) implied that retailers should closely collaborate with suppliers in order to ensure effective coordination of activities.

Sirilertsuwan et al. (2018:1346) have revealed that close-proximity clothing manufacturing advances sustainability while benefiting the bottom line. Their findings further showed that the government’s role in supporting the improvement of proximity manufacturing involves the following: formation of clothing-industry clusters with different types of suppliers and service providers; the issuing of favourable trade policies; the utilisation of carbon-footprint taxation on imported garments; the offering of tax credit for proximity garments; recycling-programmes support; machinery, technology and business-operations financing support; education support; process-development support; business-collaboration support; technical business-infrastructure support; the sharing of resources with neighbouring governments; the implementation of environmental laws and regulations for water usage, chemical release, gas emission and filtration technology; the offering of clean sources of energy; beneficial labour laws and regulations; stringent health regulations and laws; and the passing of laws and regulations to ensure that the country of origin can be identified in advertising.

The abovementioned recommendations of Sirilertsuwan et al. provide a good summary of the solutions from literature addressing the supply-chain-management-model challenges of South African fashion designers in the retail clothing industry. These are listed under the following headings:

- Cash Flow and Funds
- Fabrics
- CMTs (Manufacturing)
- Skills and Knowledge
- Business Acumen
- Market Access or Distribution
- Human Skilled Resources
- Quality
- Fragmentation
- Costing
- Marketing
- Competition

6.4. Theoretical Framework and Findings

This research study applied the functionalist theory, through interviewing different stakeholders and determining how they contributed to the stability of the supply-chain-management model of South African fashion designers in the retail clothing industry. This is according to Crossman (2019), who detailed that the functionalist theory defined each part of society in terms of how it contributed to the stability of society, signifying that each part of society served a purpose for the stability of the whole. More specifically, the micro-functionalism theory was applied, which is the study of small business systems (Alderson, 1965, cited by Svensson, 2002:739). In line with the theory, the findings substantiated the assumption that South African fashion designers were classified as SMMEs, as the fashion designers were found to work with teams of fewer than fifty employees.

Dadabhoy and Muth (2006) categorised the functionalist theory as a means of focusing on the whole unit of society as interconnected parts that influence the entire society. As a result, the findings of this study considered the input of different stakeholders as interconnected parts that influence the entire supply-chain-management model of South African fashion designers in the retail clothing industry.

Functionalist theorist Durkheim (1956:46) was certain that for society to continue, it required both an adequate differentiation of roles in order to provide the members with the directive and adequate solidarity to operate efficiently together and continue as members of that particular society. This further substantiates the input from stakeholders such as South African fashion designers, retailers, fashion councils, government institutions, educational institutions, and retail consultants or agents, to operate efficiently together and continue as members of the supply-chain-management model for the retail clothing industry.

The sub-questions for this research study were designed to apply different functionalist theories. Merton (1968, cited by Mooney at el., 2007:1) verified that there were two types of functions, the manifest functions and the latent function. The manifest function resulted in intended consequences that are commonly recognised, while the latent function resulted in unintended outcomes. The manifest function was specifically applied to the first two sub-questions of this research study, which evaluated the intentional supply-chain-management structures, processes and capacity of South African fashion designers in the retail clothing industry. But with the third sub-question, the latent function was applied, which was the unintended consequences of the supply-chain-management structures, processes and capacity of South African fashion designers in the retail clothing industry. This was translated into a number of challenges. As such, the recommendations discussed in detail in the following chapter are based on functionalism.

6.5. Chapter Summary

In this chapter the findings from Chapter Five were explored in connection with the literature review and the research objectives outlined in Chapters One, Two and Three. The introduction outlined the problem statement, the main question of this research study, and the core objective of this research study. In turn, the analysis of the findings and the literature presented answered the three sub-questions of this research study, which were:

1) What are the business and supply-chain-management structures of South African fashion designers in the retail clothing industry?
2) What are the supply-chain-management processes and timelines of South African fashion designers in the retail clothing industry?
3) Where are the greatest supply-chain challenges experienced by South African fashion designers in the retail clothing industry?

The sub-questions were discussed as code-groups, and within those code-groups specific codes were identified from the findings. Those codes identified under the first sub-question were the following:

- *Code 1: Fashion Business Structures*
- *Code 2: Fashion Designers' Capacity*
- *Code 3: Retail Business Structures and Capacity*
- The codes identified under the second sub-question were the following:
- *Code 4: Fashion Designers' Timelines and Lead Times*
- *Code 5: Supply-Chain-Management support for Fashion Designers in Retail*
- With the third sub-question, the findings were closely interlinked. Therefore, the discussion of the three codes were grouped as follows:
- *Code 6: Fashion Business/Designers' Supply-Chain-Management challenges*
- *Code 7: Retailers' Challenges with South African Fashion Designers*
- *Code 8: Fashion Designers' Supply-Chain-Management Weaknesses*

The findings revealed that different product types required different business structures and supply-chain-management models. Due to these findings, a standardised flow of the supply-chain-management-model echelons was found to be not suitable for the development of an effective and sustainable supply-chain-management model for South African fashion designers in the retail clothing industry. Instead, the application of the functionalist theory proved to be most convenient, as the function of each stakeholder would be identified and detailed at each point of the echelon, to develop an effective and sustainable supply-chain-management model for South African fashion designers in the retail clothing industry.

South African fashion designers were found to work with small to medium structures, which only accommodated minimum production capacity of small units. Various retailers were found to work with South African fashion designers, such as department stores, independent chains, boutique stores and online retailers. Nevertheless, the terms of the agreements appeared to be less favourable for the fashion designers.

Due to the lack of raw materials and production facilities, it was also found that South African fashion designers required an average of three months for complete production and delivery to the retail clothing industry.

Many challenges experienced by South African fashion designers in the supply-chain-management process were discussed, and it was found that international literature presented possible mitigation strategies for those challenges. In addition, this research study identified that South African fashion designers received various kinds of support from several stakeholders throughout the supply-chain model.

Lastly, to justify the research findings, the theoretical framework underpinning this study was presented, which was the functionalist theory. Answering the three sub-questions led to the answer to the main question, which is discussed more in detail in the following and final chapter.

CHAPTER SEVEN: CONCLUSION AND RECOMMENDATIONS

The previous chapter provided a discussion of the findings of this research study. The purpose of this chapter is to present the conclusions and recommendations drawn from the discussions related to the findings from the data-analysis processes completed in the previous chapters. The conclusions that are drawn and recommendations deduced considered the input from participants and the overall findings of this research study. What is believed to be an effective and sustainable supply-chain-management model for South African fashion designers in the retail clothing industry will then be recommended, together with the suggestions for future research studies.

7.1. Summary

This research study was developed because the researcher noticed a fundamental problem that most South African fashion designer brands struggled with to maintain longevity and success within the retail clothing environment. This research study went on to discover that the transition from high-end bespoke or tailoring fashion design to RTW fashion design for retail posed supply-chain changes and challenges for South African fashion designers. Though streetwear and leisurewear fashion designers appeared to be most ready for the retail clothing environment, their supply-chain-management model for the retail industry encountered similar challenges to those of high-end bespoke or tailoring fashion designers.

As mentioned in the previous chapters, the main research question was: what is the most effective supply-chain-management model for South African fashion designers to function within the retail clothing industry? Accordingly, the following supporting questions were asked:

- What are the supply-chain-management structures of South African fashion designers in the retail clothing industry?
- What are the supply-chain-management processes of South African fashion designers in the retail clothing industry?
- Where are the greatest supply-chain challenges experienced by South African fashion designers in the retail clothing industry?

The findings of this study will then be used to propose the best functions for stakeholders to achieve an effective supply-chain-management model for South African fashion designers in the retail clothing environment. Twenty-four in-depth semi-structured interviews and an extensive literature review were conducted to gather the information that provided the basis for the development of the proposed supply-chain-management model for South African fashion designers in the retail clothing industry.

7.2. Answering Research Sub-Questions with Recommendations

As previously acknowledged, three research sub-objectives were considered, each with corresponding sub-questions. This research study answered all three sub-questions, which shaped the answer to the main question. The answers to the sub-questions are summarised below.

7.2.1. What are the business and supply-chain-management structures of South African fashion designers in the retail clothing industry?

Fashion designers who emerged as bespoke or tailoring fashion designers were found to work with predominantly fashion-design teams and in-house production teams, while streetwear and leisurewear fashion designers were found to have limited relationships with various service providers, including manufacturers, throughout the supply-chain-management model. It is therefore evident that support and nurtured relationships along the supply-chain-management model are essential.

South African fashion designers' business structures were classified as small to medium enterprises, with a limited production capacity of between fifty and five hundred units per style, supplying an average of one to five different retailers. Most retailers worked with South African fashion designers on the consignment or commission model, while a reduced number of retailers would purchase intellectual property or purchase actual products from South African fashion designers.

Most participants articulated that the consignment or commission model disadvantaged fashion designers financially, as the fashion designers would only receive payment for manufacturing, material, travel and all the other overhead costs associated with the production of the garment after it was sold. Concurrently, it was found that the retailers that purchased the products from South African fashion designers would only pay after thirty to ninety days after the products had reached the retail store, which again disadvantaged South African fashion designers financially, as the designers were required to utilise their businesses' cash flow to pay manufacturers, suppliers and all the related overheads, without any revenue streams, for a prolonged time.

This research study acknowledges Hultman and Elg's (2018:339) findings, which recognised the necessity of CSR when developing a sustainable supply-chain-management model for retail. Synchronously, it was confirmed during the interviews that one of the big five South African clothing retailers had also recognised that in order to ensure a sustainable supply-chain-management model for SMMEs, better CSR approaches were necessary, and therefore that particular retailer had committed to more supportive payment structures, which would better assist SMMEs with the cash flow required to meet the expected orders. It is thus essential and recommended for retailers to reconsider their ninety- or thirty-days payment structures when working with South African fashion designers, and to rather consider their CSR approaches or Broad-Based Black Economic Empowerment (B-BBEE) to better support SMMEs.

Alternatively, should retailers insist on working with fashion designers on a consignment or commission basis, this research recommends that there be the establishment of a progressive contract, whereby ultimately the retailers would work with the fashion designers on consignment over a limited period, and thereafter the retailer would start working towards purchasing the designer's products once certain targets were met. At the same time, fashion designers would be required to apply trend, planning, merchandising, sell-through rates and other information or feedback from retailers in order to use the knowledge to design product ranges that would meet the stipulated targets.

For South African fashion designers to successfully interpret the trends, planning and merchandising information, they would require assistance from the trend, planning and merchandising department or consultants. Due to the limited resources of South African fashion designers, it is this researcher's recommendation that retailers subsidise or fully support South African fashion designers with the trend, planning and merchandising processes, as this imperative process could potentially benefit both the retailers and the fashion designers in the long run if the right products are being designed for retail at the right time.

The different retailers were found to work very differently with the fashion designers, as the majority of retailers assigned the management of the fashion designers to existing departments.

As a result, no designated departments were managing the relationships with South African fashion designers. Therefore, it is recommended that retailers should consider Elg and Hultman's (2011:451) retailer best-practices model in managing CSR supplier relationships. These best practices include (i) developing a code of conduct, (ii) ensuring first-tier supplier compliance, (iii) following up on second-tier suppliers, (iv) establishing local offices, (v) conducting site visits, (vi) consulting external experts, (vii) using external audits and (viii) publishing sustainability reports. Elg and Hultman recommended these practices to retailers as they would assert a strategic focus on supplier relationships, instead of retailers seen as merely taking part in social initiatives, as mentioned by several participants. However, this research recognises that there are some retailers with limited resources, and as a result, it is recommended for those retailers to implement the abovementioned best practices gradually, in phases, rather than implementing them all at the same time.

7.2.2. What are the supply-chain-management processes and timelines of South African fashion designers in the retail clothing industry?

In relation to the abovementioned findings, the second question of this research study was answered, as findings revealed that the supply-chain-management processes of South African fashion designers differed. First, it is recommended for fashion designers to collaborate or coordinate some of the supply-chain processes, such as (but not limited to) manufacturing, printing and fabric sourcing. In this way, the different supply-chain processes would be shared, which would result in increased resources for many fashion designers. Nonetheless, this research study recognises that there would be a need to facilitate and coordinate all the collaborative efforts, which introduces the importance of a national fashion council.

Second, it is recommended that larger retailers work towards integrating South African fashion designers into their supply-chain-management models, as it was found that fashion designers that were integrated in the supply-chain-management model of retailers received the required support towards their cash-flow and supply-chain processes, such as trend forecasting, merchandise planning, manufacturing and fabric sourcing.

With regards to the timeline, the findings revealed that the processes that contributed to the supply-chain-management timelines of South African fashion designers in the retail clothing environment included research, sourcing of materials, purchasing of materials, the designing process (prints or full garments), sampling of products, finalising designs, marketing, final production for retail, and the transportation processes. This research study, therefore, used these findings as foundational knowledge in the development of an effective supply-chain-management model for South African fashion designers in the retail environment.

One of the factors discovered through this research study was that in-house fashion designers for the retail clothing industry worked with detailed research and design-development processes that considered commercial designer garments. Contrarily, there appeared to be limited consideration for commercial basic designer items, such as the basic white T-shirt or shirt, to fill the gaps in South African fashion designers' ranges. In support of these findings, it was the participants' recommendation that South African fashion designers re look their business models and add tiering around products, by including commercial products while maintaining the essence of their brands. On top of that, fashion designers needed to understand that, according to one participant, "They were not selling out if they were creating the perfect white shirt that represents them and that can sell, or a scarf that they know, because they have a certain handwriting that gets put on a jacket that's R5 000 that not many people can afford, they can take that handwriting and put it on a scarf that people can afford if they want to own a little bit of their brand.".

It was established that South African fashion designers considered factors such as costing, mark-up percentages, market-segmentation strategies, local production and agility, and design work such as mood boards, colour boards, fabric boards, costing sheets, points-of-measure sheets and specification sheets (referred to as technical packs) when designing for the retail clothing industry. It is therefore the researcher's viewpoint that, without the initial consideration of fabric, the abovementioned factors would prove difficult to determine.

In addition, though South African fashion designers preferred to remain agile throughout the supply-chain-management process, it is the recommendation of this research study that fashion designers should consider the leagile strategy, which would ideally be implemented with partial market mediation, as such approaches would be applied when a mix of designer and standard merchandise is being produced, and therefore the organisation would be utilising different supply bases for the final product (Towers and Bergvall-Forsberg, 2009).

Bearing in mind the different product types of South African fashion designers, it was found that the overall supply-chain-management process took them between two and ten months to complete their ranges in preparation for the retail clothing industry. When the sourcing and production of fabric were not considered, it was found that South African fashion designers took on average six weeks to produce garments for retail. Moreover, the research findings demonstrated that South African fashion designers often travelled long distances to source production and manufacturing facilities that provided good-quality fabric, prints and garment construction. Though a fraction of fashion designers had established in-house production facilities, those fashion designers found that they nonetheless required additional outsourced manufacturing assistance as retail demand grew. Hence, the essential recommendation of this research study is that South African fashion designers should endeavour to eliminate complicated transportation infrastructure within the supply-chain-management process by sourcing from close-proximity fabric suppliers, printers and manufacturing facilities.

Considering the abovementioned recommendation, this research study recognised that a more intentional approach towards the supply-chain-management model for the retail clothing industry was essential. The development of retail strategic plans with retail research, clear objectives, retail vision, milestones, costing plans, mark-up percentages, market-segmentation strategies, local production plans, supply-chain strategy, and technical-pack plans are recommended as essential information and guidelines for South African fashion designers in the retail environment.

It is also the recommendation of this research study that South African fashion designers should seek support from either business consultants or retail agents. One of the participants explicitly explained this when it was mentioned that fashion needed to be treated as any other business, with a clear business plan detailing all the strategic goals, and all the fashion designers without the necessary business documents should work on all their strategic goals.

The findings did reveal that various support services were available from educational institutions, government institutions, fashion councils, retailers or retail agents, and other fashion designers for South African fashion designers in the retail clothing industry. The support South African fashion designers received along the supply-chain-management process included skills, knowledge, marketing, distribution, training, business incubation, funding, retail planning, forecasting, linkages with retail, mentorship and shared information. However, it appeared that this support was limited, fragmented and exclusive to a fraction of South African fashion designers in the retail clothing environment.

It is therefore the recommendation of this research study that there should be more specialised support for South African fashion designers throughout the supply-chain-management process, before, during and after the establishment of their relationship with the retail clothing industry. This specialised assistance would support fashion designers with communication along the supply-chain-management process and with various retail and fashion business requirements. Therefore, this specialised assistance would be in the form of planners or merchandisers, business consultants, retail agents, administrators and trend forecasters.

7.2.3. Where are the Supply-Chain-Management Challenges Experienced by South African Fashion Designers in the Retail Clothing Industry?

While answering the first two research sub-questions, numerous challenges were identified and recommendations were put forward both from literature and the interviews. Those challenges identified in the first two sub-questions were textile and garment-production challenges due to a lack of CMTs (or manufacturing facilities), textile mills or suppliers. One other major challenge also identified in the first two sub-questions was that of cash flow due to the payment structures enforced by retailers. Irrefutably, when analysing the data of this third sub-question, the two abovementioned challenges were found to be the predominant supply-chain-management challenges experienced by South African fashion designers in the retail clothing industry.

Overall, challenges identified in this study affected the supply-chain-management process of South African fashion designers in its entirety and not just certain parts in isolation. As a result, each challenge was found to have a very close association to the next challenge. The other challenges found and addressed by this research study, other than the two challenges discussed in the first two sub-questions, were skills and knowledge, the business acumen of fashion designers, market access or distribution, human skilled resources, quality, fragmentation, costing, marketing, competition and technology.

The focal recommendations identified to counteract these supply-chain-management challenges was communication. Several participants were in agreement and acknowledged that the supply-chain-management process of South African fashion designers in the retail clothing industry required an efficient communication flow between retailers and designers, designers and manufacturers, and all other parts of the value chain.

The major factors that were recommended by participants to drive this effective communication to counteract all these challenges were (i) close-proximity hubs for South African fashion designers, (ii) the establishment of a national fashion council and regional fashion councils, and (iii) the visible presence of mediators and value-chain support from agents and business consultants. Table 5 (below) fully enunciates each of the communication enablers recommended.

Table 5: Supply Chain Communication Recommendations (author's source)

	Function	*Challenges Counteracted*
Fashion Hubs	Provide close-proximity manufacturing facilities with up-to-date technology especially for fashion designers	Manufacturing or CMT Challenges and Quality Challenges
	Provide research resources and design software	Technology Challenges
	Showrooms: Provide and showcase fabric suppliers under one roof	Fabric and Fragmentation Challenges
	Showrooms: Showcase South African fashion designers RTW ranges for retail under one roof	Market Access/Distribution and Fragmentation Challenges
	Provide access to agents, consultants, textile technologists, textile designers, graphic designers, marketers and photographers	Business Acumen Challenges, Quality Challenges and Marketing Challenges
	Provide national and international directories of value-chain members	Fragmentation Challenges
National Fashion Council Establishment	Facilitate communication with government departments on behalf of the fashion industry	Cash-Flow and Funding Challenges and Fragmentation Challenges
	Facilitate communication with businesses on behalf of the fashion industry	Cash-Flow and Funding Challenges and Fragmentation Challenges
	Provide sustainable and relevant funding cycles for fashion designers in support of retail	Cash-Flow and Funding Challenges and Fragmentation Challenges
	Maintain consistency and relevance in national and international showcasing platforms	Market Access Challenges
Agents and Business Consultants	Communicate with retailers	Fragmentation Challenges
	Deliver on sources of fabric and manufacturers	Fabric Challenges

As seen in Table 5 (above), close-proximity hubs for South African fashion designers were recommended by most participants. Furthermore, the recommendation was for those close-proximity hubs to be easily accessible and available for South African fashion designers, thus, the location of those hubs in major South African cities would be pivotal. The hubs would provide support with various trend-research platforms, access to design software and research, manufacturing facilities with seamstresses and up-to-date machinery, printing facilities with relevant technology, showrooms for fabric suppliers and RTW ranges, access to various supporting agents and consultants specialising in (but not limited to) business, production management, marketing and trends, and access to textile technologists, textile designers and graphic designers.

Some participants recognised that the establishment of hubs would require an entity, department or organisation to oversee the formation and the value-chain management of those various hubs. As a result, the need for a national fashion council emerged, which would work with the private sector or provincial fashion councils in establishing these hubs. The recommendation for a national fashion council was to facilitate communication with government departments and private-business industries in order to drive the establishment of those hubs.

Kimani (2016) reported that each country had its own inspirations and influences in fashion, and one thing in common about countries such as the USA, Italy, France and Britain to realise their true potential in fashion, was that they had a fashion council that promoted their home-grown styles by "harnessing and sharing communal knowledge, capabilities, and resources in the sector". For example, the Council of Fashion Designers of America (CFDA) established a fashion manufacturing initiative funded by the New York City Economic Development Corporation to support New York City's fashion manufacturing, by offering grant funding, local production funding, workforce development and a manufacturing directory for fashion designers (CFDA, 2016). Furthermore, the CFDA owns and organises the official calendar for New York Fashion Week, which is a hub for many designer showrooms, even those that are "unofficial". In the same way, a national fashion council could potentially facilitate and harness the development of the retail fashion-clothing supply chain hubs through grants and/or an information portal.

Over and above establishing hubs, participants recognised that the trade-show platforms the DTI supported to provide international retail exposure for South African fashion designers, required further research and consistency. Participants observed that to establish a presence at trade shows, consistent attendance was required for about three to five consecutive years at the same trade shows for fashion designers to be recognised by retailers or distributors. Hence, it is recommended for government departments to research relevant trade-show and fashion showcasing platforms, with great potential to offer South African fashion designers to the retail clothing industry international retail opportunities, and to consistently support the same fashion designers at the same relevant platform for a suitable period. Again, the abovementioned could potentially be recognised through a national fashion council that works very closely with government departments.

Furthermore, participants working very closely with government departments highlighted that in the discussion of the establishment of entities such as fashion councils, the mandate that came through was that the cluster had to be self-sufficient by a certain time period, which was about three to five funding cycles. However, such limited time frames enforced by government departments on clusters such as fashion councils tended to be at odds with the output required, which included the assistance of the industry to change behaviours, the building of bonds with the industry, and the development of an upward trajectory. It is therefore recommended that the government and clusters should research and communicate the best approaches in funding clusters such as a national fashion council.

In addition, one of the significant recommendations to counteract the supply-chain-management challenges that fashion designers in South Africa were facing was that fashion and retail education should be reevaluated. Some participants expressed the need for specialised knowledge of the supply-chain-management process, and this knowledge can only be acquired through education. One participant noted, “The education part is important and the fashion industry or retail clothing industry does not have a proper common standard. There are some design schools where the outcome is treated as satisfactory or good quality to the value chain but it’s not as if there is a common piece of paper that carries a common certification like a CA certificate.” Another participant said that “there are many facets in fashion, [and] I think if graduates understand that there are so many facets and if all those facets are outlined and explained properly. There are certain things that people are into. You could be in fashion and love spreadsheets, then planning is for you; or you could be in fashion and I love geometry and mathematics, that’s why patterns would be for you. You could be in fashion and love selling an idea, [so] branding is for you.”

It is therefore recommended that fashion and retail clothing educational institutions to collaborate and work towards achieving a common standard that would build credibility for the fashion and retail clothing industries. Additionally, it is the recommendation of this research study that educational institutions should examine the retail clothing value chain and determine an area of specialisation and build value through education for that chosen area within the retail clothing supply-chain-management process. As a participant said, “Not everyone can become a designer but a lot more people can work in fashion without knowing how to sew, without knowing how to design, and the industry could offer employment across different facets of those who think with numbers, those who think with strategy. There are different facets which I don't think our students are being educated in, and therefore our retail spaces are not getting qualified people."

Considering the answers to the three sub-questions, the following section of this research study summarises the contribution of this research study to supply-chain-management practices and the body of knowledge.

7.3. Answering the Main Research Question with Conclusion

As mentioned at the beginning of this chapter, the main research question for this study was, what is the most effective supply-chain-management model for South African fashion designers to function within the retail clothing industry? By answering the three sub-questions, the answer to the main research question emerged, which is summarised in the model proposed in Figure 7 (below).

Figure 7: Proposed Effective Supply-Chain-Management Model for South African Fashion Designers in Retail

Overall, this research study discovered that to achieve an effective and sustainable supply-chain-management model, good communication was required throughout the supply-chain-management process. Furthermore, this research study showed that for good communication to be achieved, facilitating bodies were required, which were found to be a national fashion council together with provincial fashion councils.

Considering the research contribution and answer to the research question, the following section provides the researcher's reflections.

7.5. Reflections

Given that in the past numerous South African fashion designers did not achieve longevity within the retail clothing industry, in more recent years there have been fashion designers who have consistently worked hard to succeed in the retail clothing industry. However, that hard work was not without challenges, and it was found that South African fashion designers still required assistance and support with their supply-chain-management processes in order to achieve efficiency and sustainability for the retail clothing industry.

Though government departments had made efforts to assist South African fashion designers in the retail clothing industry, their approach required re-evaluation and further research. One of the participants explained the South African communication barriers well, saying, "Various government departments had attempted to establish fashion hubs and fashion councils to assist South African fashion designers with their supply-chain-management processes. However, South African industries stereotypically do not share information and seem protective of their own intellectual property or their products. Whether it's the business process, the product development, the products themselves, the quality, the best supply chain, their logistics, they have come off a traditional base, and that's one of the biggest barriers in developing clusters." As a result, until the communication barriers are broken down, and South African industries recognise that there is power in information sharing, it is the opinion of this researcher that the country's industries will, unfortunately, achieve minimal growth.

With that in mind, it is imperative for government departments and the industry as a whole in South Africa to support academic research and implement progressive research findings, so that the country's industries can be progressive, like industries in first-world countries that work very closely with research departments and various clusters such as fashion councils.

7.6. Further Research

This research study shaped a foundation to accommodate further research and investigation into various components of the supply-chain-management process of South African fashion designers in the retail clothing industry. Future research could be more focused on the manufacturing processes of South African fashion designers in the retail clothing industry. This would establish the best manufacturing approaches for South African fashion designers in the retail clothing industry.

Studies related to effective communication throughout the supply-chain-management process could potentially also be carried out. This would outline the best communication approaches and tools to utilise throughout the supply-chain-management process. Alternatively, research based on South African fashion designers' communication with various partners within the supply-chain-management network of the retail clothing industry could be considered, for example, South African fashion designers' communication methods or channels with manufacturers, or South African fashion designers' communication methods or channels with retailers, or South African fashion designers' communication methods or channels with fabric suppliers. These studies would potentially ensure better communication between South African fashion designers and supply-chain partners of the retail clothing industry.

Future studies into specialised, standardised and regulated fashion education to support the supply-chain-management process and the retail clothing industry are recommended. These studies would put to the test the proposed supply-chain-management model to determine the level of impact education would have. Alternatively, further studies could be conducted to put to the test the clothing value-chain hub theory to test or consider the processes required for the clothing value-chain hub to operate strategically. Finally, longitudinal studies or case studies could also be undertaken to test the conceptual model proposed in this research study.

7.7. Final remark

In conclusion, it is the hope of this researcher to witness further research to test, implement or improve on the proposed sustainable and effective supply-chain-management model of South African fashion designers in the retail clothing industry. However, the researcher does recognise that even the government does have limited resources to support the fashion councils or businesses to establish the recommended close-proximity hubs, so this research would suggest for the close-proximity hubs of the retail fashion clothing supply chain to be established in phases and not be undertaken all at once. For example, the first phase could potentially be the establishment of fashion-design CMTs at or around the hubs, the second phase could be the launch of fabric supply and/or sourcing, the third phase could be the development of showrooms for fashion designers, and so on. Once one hub is completed, a similar concept could then be rolled out to metropolitan cities in other provinces.

It is important to also remember that South Africa is a country that is rich in culture, but that many cultural facets and skills that could potentially contribute towards fashion designers' production lines have not been completely utilised and realised within the supply-chain process of South African fashion designers. For example, crafters, wax printers, beaders, weavers and knitters could potentially benefit from the innovation of garment and textile production at the hubs, while creating employment for South African communities.

Retrospectively, the researcher found it imperative to highlight the supply-chain-management challenges and weaknesses of South African fashion designers, as it was recognised during the interview processes that fashion designers who understood their challenges and weaknesses were able to turn them into strengths and overcome them. Nevertheless, to drive the efforts to counteract South African fashion designers' challenges and weaknesses in the retail clothing industry, good communication, open collaborations, systematic coordination, great management, strong leadership and the right attitudes from relevant stakeholders would be pivotal.

7.8. Covid-19 Reference

The preparations and assumptions made for and conclusions drawn from this dissertation were completed before the initiation of the country's five-week lockdown, beginning at midnight on Thursday 26 May 2020, in an effort to slow the spread of the novel coronavirus Covid-19. The result of the lockdown will almost certainly be a vastly altered economic reality in South Africa, with significant ramifications for small-business owners, including South African fashion designers in the retail clothing industry.

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Appendix A: Consent Form

Cape Peninsula University of Technology

Faculty of Business & Management Sciences
Graduate Centre for Management
4th Floor, Engineering Building
Cape Town Campus, Cape Town
021 460 3833

CONSENT FORM FOR PARTICIPATION IN RESEARCH

I ____________________________, am over the age of 18 years and hereby consent to participate as requested in the research study titled ***"development of an effective and sustainable supply chain management model for South African fashion designers in the retail clothing environment"***

I acknowledge that:

1. I have read the information provided to me as a participant. ☐
2. Procedures and the risk involved have been adequately explained to my understanding. ☐
3. I should retain a copy of the Consent Form for future reference. ☐
4. I may not directly nor immediately benefit from taking part in this research. ☐
5. I am free to withdraw from the project at any time as well as omit particular questions. ☐
6. While the information gained in this study will be published, I will not be identified and individual information will remain confidential. ☐
7. Whether I participate, withdraw or abstain after participating, will have no effect on any treatment or service that is provided to me. ☐
8. Whether I participate, withdraw or abstain after participating, will have no effect on my work within the organisation that I work for. ☐
9. Whether I participate, withdraw or abstain after participating, will not prejudice any future relations with Cape Peninsula University of Technology and my own employer. ☐

Participant's Signature: ________________________ **Date:** _____________

Researcher's Declaration: I certify that I have explained the study to the participant and consider that she/he understands what is involved and freely consents to participation.

Researcher's name: Boitumelo Pooe **Contact:** 084 466 2428

Researcher's Signature: **Date:** _____________

Appendix B: Interview Questions- Fashion Designers

1. Can you tell me about your business or organization?
2. Does your organization have a set structure or model when producing for retail?

   Probe: What is your organisation's set structure or model from design concept to retail?

   Probe: Is it written down somewhere and does it assist the organization to function effectively and sustainably with clothing retail?

Objective 1: Business and Supply Chain Structures of South African Fashion Designers in the Retail Environment:

3. How many clothing retailers does your business work with/supply?

   Probe: Does your business have capacity for additional retailers?
4. What is the actual number of designs/styles and total units which go through the supply chain management model at a time, for on-time retail delivery?
5. How many units do you prefer going through the supply chain model at a time for on-time retail delivery?

   Probe: Why do you prefer the number mentioned, going through the supply chain model at a time for on-time retail delivery?

Objective 02: Steps and Levels Required in the Supply Chain Management Model for South African Fashion Designers in the Retail Environment

6. How long does it each process within the supply chain model take for your designs to reach retail on time?

   Probe: How long would you prefer for each function of the supply chain model to take for your designs to reach retail at the ideal time?
7. How many individuals/companies assist you at each phase for your supply chain model?

   Probe: How many individuals/companies do you actually require (or would be ideal) to assist you for optimal functionality of your supply chain model?

Objective 3: Challenges South African Fashion Designers are Experiencing in Managing their Supply Chains for the Retail Clothing Environment

8. What was/are the biggest difficulties/challenges in managing the supply chain model functions for retail readiness?

   Probe: How did/have you managed these difficulties/challenges within the clothing supply chain?

9. What resources do you consistently require to ensure that these difficulties/challenges do not reoccur?
   Probe: Why don't you have access to these resources?
10. How do the difficulties/challenges within the supply chain management model affect your relationship and function within retail?

Leveraging the Supply Chain Management Model

11. Which supply chain management functions are outsourced and which processes are onsite?
    Probe: What would be the most preferable supply chain processes to be outsourced and onsite?
12. What in your opinion are the strongest competencies of South African designers within the retail environment?
13. What in your opinion are the weaknesses and shortcomings of South African designers within the retail environment?

Achieving Economic Sustainability for South African Fashion Designers in the Retail Environment

14. How would you in your current and/or ultimate capacity as an experienced fashion designer best assist up and coming South African fashion designers in the retail clothing environment achieve economic sustainability and effectiveness within their supply chain management?
15. What type of supply chain management model do you hope to see for South African fashion designers in the retail environment?
    Probe: What information or resources do South African fashion designers in retail specifically require to achieve the aforementioned?

Closing Questions

16. What would you like to add, contribute and/or propose to the development of an effective and sustainable supply chain management model of South African fashion designers in the retail clothing environment?

Appendix C: Interview Questions- Retailers

1. Can you tell me about your business or organization and what you do within this organization?
2. How do you support or work with fashion designers in retail?
   Probe: Does your organization have a set structure or model when supporting or working fashion designers?

Objective 1: Business and Supply Chain Structures of South African Fashion Designers in the Retail Environment:

3. How many fashion designers does your business work with?
   Probe: Does your business have capacity for additional designers?
4. How many designs/styles and total units do (or would) you recommend to go through the supply chain management model at a time, for efficiency?
   Probe: Why do (or would) you recommend that?

Objective 2: Steps and Levels Required in the Supply Chain Management Model for South African Fashion Designers in the Retail Environment

5. What is the recommended (or given) timeline for fashion designers to reach retail on time?
   Probe: Is this ideal and why?
6. What are the minimum supply chain management requirements for South African fashion designers supplying retail?
   Probe: Why have you set out these stipulations

Objective 3: Challenges South African Fashion Designers are Experiencing in Managing their Supply Chains for the Retail Clothing Environment

7. What was/are the biggest difficulties/challenges in managing fashion designers' supply chain management model functions for retail readiness?
   Probe: How did/have you managed these difficulties/challenges?
8. What resources do you offer fashion designers to ensure that these difficulties/challenges do not reoccur?
   Probe: Do you think additional assistance is required?
9. How do the difficulties/challenges within the supply chain management model affect your business?

Leveraging the Supply Chain Management Model

10. Is the management of fashion designers supplying your business outsourced or onsite?
    Probe: Is this most functional/preferred for your organization?
11. What in your opinion are the strongest competencies of South African designers within the retail environment?
12. What in your opinion are the weaknesses and shortcomings of South African designers within the retail environment?

Achieving Economic Sustainability for South African Fashion Designers in the Retail Environment

13. How would you in your current and ultimate capacity as a retailer or retail agent/consultant best assist South African fashion designers in the retail clothing environment achieve economic sustainability and effectiveness within their supply chain management?
14. What type of supply chain management model do you hope to see for South African fashion designers in the retail environment?
    Probe: What information or resources do South African fashion designers in retail specifically require to achieve the aforementioned?

Closing Questions

15. What would you like to add, contribute and/or propose to the development of an effective and sustainable supply chain management model of South African fashion designers in the retail clothing environment?

Appendix D: Interview Questions- Fashion Education

Opening Questions

1. Can you tell me about your business or organization?
2. How many fashion designers that you work with have ended up in retail?

Objective 1: Business and Supply Chain Structures of South African Fashion Designers in the Retail Environment:

3. What support do you offer to these fashion designers?

   Probe: Where else do you believe your organization could best assist fashion designers supply chain management model for retail readiness?
4. Does your organization have a set structure or model (for fashion designers) when preparing them for retail?

   Probe: Is it written down somewhere and does it assist the organization (and fashion designers) to function effectively and sustainably with clothing retail?

Objective 2: Steps and Levels Required in the Supply Chain Management Model for South African Fashion Designers in the Retail Environment

5. What would you suggest for the minimum supply chain management requirements for South African fashion designers supplying retail?

   Probe: Why do you suggest these requirements?

Objective 3: Challenges South African Fashion Designers are Experiencing in Managing their Supply Chains for the Retail Clothing Environment

6. What was/are the biggest difficulties/challenges your organization experienced or noticed with fashion designers going into retail?
7. What resources would you ideally offer to fashion designer to ensure that these difficulties/challenges do not reoccur?
8. How do the difficulties/challenges fashion designers face within the supply chain management model affect your relationship and function with fashion designers and/or retail?

Leveraging the Supply Chain Management Model

9. What in your opinion are the strongest competencies of South African designers within the retail environment?

10. What in your opinion are the weaknesses and shortcomings of South African designers within the retail environment?

Achieving Economic Sustainability for South African Fashion Designers in the Retail Environment

11. What type of supply chain management model do you hope to see for South African fashion designers in the retail environment?
12. How would you in your ultimate capacity best assist South African fashion designers in the retail clothing environment achieve economic sustainability and effectiveness within their supply chain management?

Closing Questions

13. What would you like to add, contribute and/or propose to the development of an effective and sustainable supply chain management model of South African fashion designers in the retail clothing environment?

Appendix E: Interview Questions- Other Stakeholders

Opening Questions

1. Can you tell me about your business or organization?
2. How many fashion designers that you work with are in retail?

Objective 1: Business and Supply Chain Structures of South African Fashion Designers in the Retail Environment:

3. What support do you offer to these fashion designers?
   Probe: Where else do you believe your organization could best assist fashion designers supply chain management model for retail readiness?
4. Does your organization have a set structure or model (for fashion designers) when producing for retail?
   Probe: Is it written down somewhere and does it assist the organization (and fashion designers) to function effectively and sustainably with clothing retail?

Objective 2: Steps and Levels Required in the Supply Chain Management Model for South African Fashion Designers in the Retail Environment

5. What would you suggest for the minimum supply chain management requirements for South African fashion designers supplying retail?
   Probe: Why do you suggest these requirements?

Objective 3: Challenges South African Fashion Designers are Experiencing in Managing their Supply Chains for the Retail Clothing Environment

6. What was/are the biggest difficulties/challenges your organization experienced or noticed with fashion designers going into retail?
7. What resources would you ideally offer to fashion designer to ensure that these difficulties/challenges do not reoccur?
8. How do the difficulties/challenges fashion designers face within the supply chain management model affect your relationship and function with fashion designers and/or retail?

Leveraging the Supply Chain Management Model

9. What in your opinion are the strongest competencies of South African designers within the retail environment?

10. What in your opinion are the weaknesses and shortcomings of South African designers within the retail environment?

Achieving Economic Sustainability for South African Fashion Designers in the Retail Environment

11. What type of supply chain management model do you hope to see for South African fashion designers in the retail environment?
12. How would you in your ultimate capacity best assist South African fashion designers in the retail clothing environment achieve economic sustainability and effectiveness within their supply chain management?

Closing Questions

13. What would you like to add, contribute and/or propose to the development of an effective and sustainable supply chain management model of South African fashion designers in the retail clothing environment?

Appendix F: Ethical Clearance Certificate

Cape Peninsula
University of Technology

P.O. Box 1906 • Bellville 7535 South Africa •Tel: +27 21 4603291 • Email: fbmsethics@cput.ac.za
Symphony Road Bellville 7535

Office of the Chairperson **Research Ethics Committee**	**Faculty:** **BUSINESS AND MANAGEMENT SCIENCES**

At a meeting of the Faculty's Research Ethics Committee on **20 February 2018**, Ethics Approval was granted to **Boitumelo Pooe (215301366)** for research activities of **Master of Retail Business** at the University of the Cape Peninsula University of Technology

Title of dissertation/thesis/project:	DEVELOPMENT OF AN EFFECTIVE AND SUSTAINABLE SUPPLY CHAIN MANAGEMENT MODEL FOR SOUTH AFRICAN FASHION DESIGNERS IN THE RETAIL CLOTHING INDUSTRY Lead Researcher/Supervisor: Dr.V V Mugobo

Comments:

Decision: APPROVED

	20 February 2018
Signed: Chairperson: Research Ethics Committee	**Date**

Appendix G: Certificate from Language Editor

Tracey Hawthorne Editorial Services

PO Box 183, Riebeek Kasteel 7307 • 083 673 0439
traceyhaw@mweb.co.za • www.traceyhawthorne.weebly.com

11 April 2020

TO WHOM IT MAY CONCERN

This serves to confirm that the dissertation titled "Development of an effective and sustainable supply-chain-management model for South African fashion designers in the retail clothing industry" by Boitumelo Pooe, submitted in partial fulfilment of the requirements for the degree Master of Retail Business Management, has been edited to my satisfaction for language and presentation.

TAHawthorne

TRACEY HAWTHORNE
Full member: Professional Editors' Group (PEG)
Professional member: PEN South Africa

Writing • Rewriting, editing, copy-editing, proofreading • Research
Tutoring, lecturing • People management • Project management