

Enhancing Transparency and Traceability of Sustainable Value Chains in the Garment and Footwear Sector

# Stakeholders' Ecosystem Report

Secretariat on behalf of Elisabeth Annat

**Multi-Stakeholder Policy Dialogue: Accelerating action for Sustainable and Circular Value Chains in Garment & Footwear**

WebEx meeting 27 | 04 | 2020



# Stakeholder ecosystem mapping:

**Objective 1:** Identify the many different types of stakeholders & actors that play a role within the value chain

## **PURPOSE**

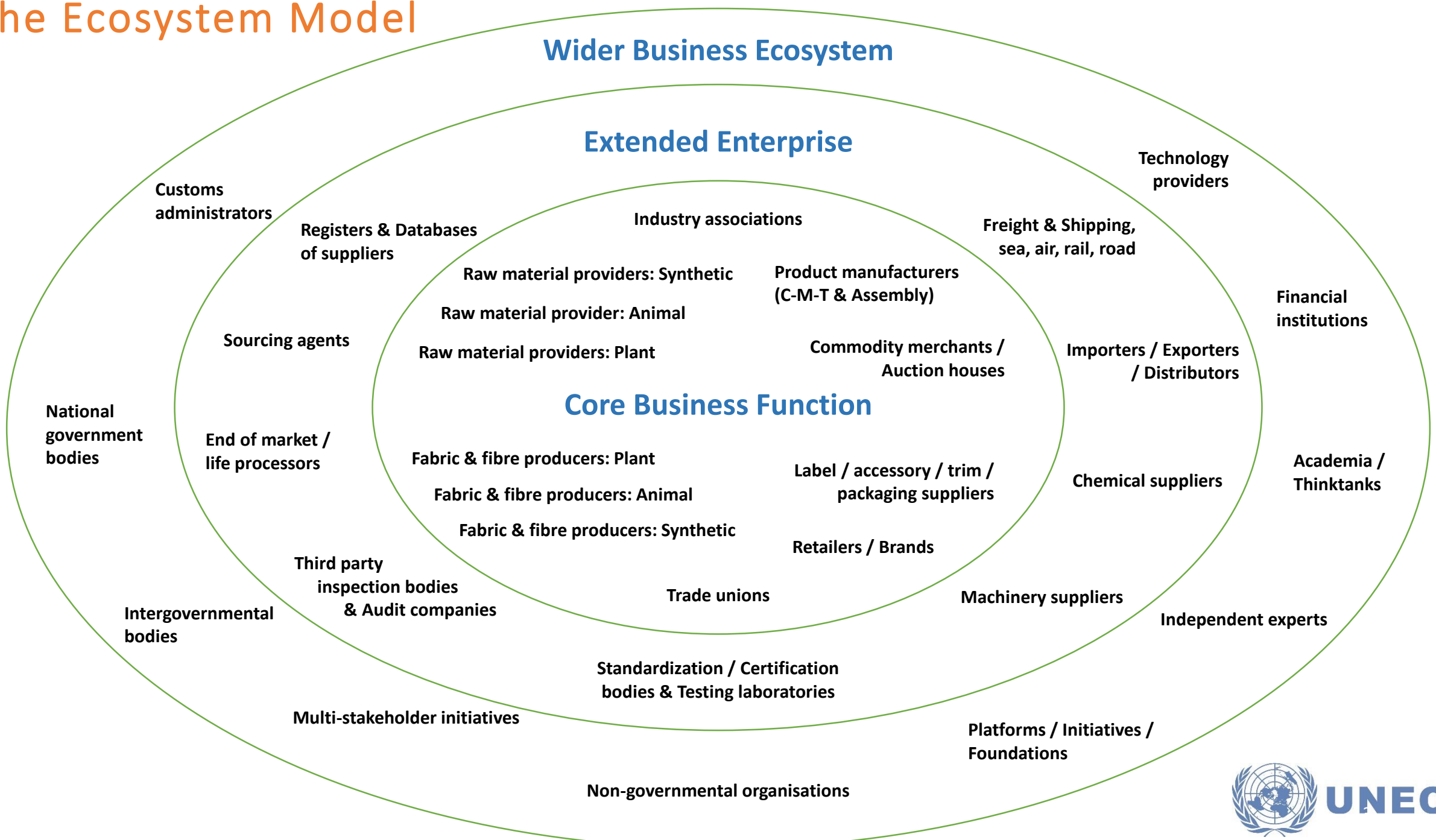
1. Produce a **descriptive, living tool** to unravel the **complexity and variety** of the stakeholders
2. Bring in **expertise**
3. Prioritize engagement with **representative associations**
4. Determine the **factors** affecting stakeholders' **ability** to **influence the ecosystem**

# The Ecosystem Model

## Wider Business Ecosystem

### Extended Enterprise

### Core Business Function



# Stakeholder ecosystem mapping

**Objective 2:** Identify the priority national actors / individual stakeholders to engage with for each of the stakeholder sub-categories within the macro-ecosystem

## PRELIMINARY RESULTS

- **400** individual representative organizations
- **23** focus countries/regions
- clustered within **27** stakeholder sub-categories

■ Stakeholder Mapping Report by Level

Level 1: Core Business Function  
Level 2: Extended Enterprise  
Level 3: Wider Business Ecosystem

Note 1: that organisations listed in *italics* are those not currently engaged in the project and are ones to consider.  
Note 2: Recommendations on specific stakeholders to engage are given in the last column. They are provided for consideration and consultation.

Level (1): Core Business Function		
Categorisation: Core Business Function / Type: Industry associations		
<b>Europe, USA and International</b> European Outdoor Group Federation of the European Sporting goods Industry (FESI) Euratex European Confederation of the Footwear Industry (CEC) Creamoda Camera Moda Federation of the Sporting Goods Industry Modint Sistema Moda Italia USCIB (United States Council for International Business) Textiles Scotland – UKFT textil+mode <i>International Apparel Federation (IAF)</i> <i>International Textile Manufacturers Association (ITMF)</i> <i>International Manufacturers Association</i> <i>American Apparel and Footwear Association</i> <i>Apparel Impact Institute</i>	<b>Organisations in focus countries</b> <b>Bangladesh</b> Bangladesh Garment Manufacturers and Exporters Association (BGMEA) <i>Bangladesh Knit Manufacturers and Exporters Association (BKMEA)</i> <b>Brazil</b> Brazilian Textile and Apparel Industry Association (ABIT) <i>Centre for the Brazilian Tanning Industry (CICB)</i> <b>Cambodia</b> <i>Garment Manufacturers Association in Cambodia (GMAC)</i> <b>China</b> China National Textile and Apparel Council (CNTAC) CTIC <i>China Leather Industry Association (CILA)</i>	<b>Key recommendations:</b> Manufacturing associations in focus countries are critical stakeholders for engagement and consultation. These organisations typically represent their members across multiple tiers of the sector. For example, in Turkey, ITKIB contains sub-groups from the apparel RMG sector, textile and raw materials and leather and leather products.  Manufacturing associations in one country can be influential at a policy level in another country (Republic of Korea in Indonesia for example, China in Ethiopia).  To ensure effective representation of these organisations, the recommendation would be to engage primarily through ITF and IAF which represent multiple national manufacturing associations and can provide high level strategic support and engagement. ITF and IAF are engaged in RBC initiatives at EU level on the EU Green Deal and Circular Economy

Page 2 of 22

# Focus countries / regions (1/2)

## Identification

**Objective** – identify countries / regions that play a key role in the garment and footwear sector.

## Method

1. Selection of countries / regions using WTO and ITC data (2018) on exports / imports\*
2. Consultation with experts

## 3. Next step: risk-based analysis



\*of textile, clothing, raw hides and skins, footwear, articles of leather, fur skins; and further within textile of cotton, wool, other vegetable textile fibres, man-made filaments, man-made staple fibres (in world's Exp. / Imp., and in some cases in national Exp. / Imp.)

# Focus countries / regions (2/2)

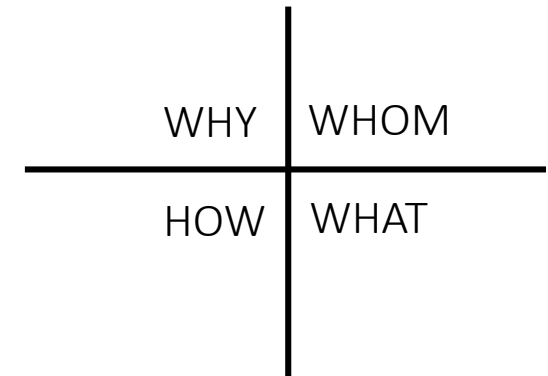
## Preliminary selection – 23 countries / regions

1. Australia
2. Bangladesh
3. Brazil
4. Cambodia
5. Canada
6. China
7. Ethiopia
8. EU28
9. Hong Kong, China
10. India
11. Indonesia
12. Japan
13. Mexico
14. Mongolia
15. Morocco
16. Pakistan
17. Republic of Korea
18. Russian Federation
19. Thailand
20. Tunisia
21. Turkey
22. United States of America
23. Viet Nam

Product / sector	Textile		Clothing		Footwear		Cotton (incl. in textile)	
	Exp.	Imp.	Exp.	Imp.	Exp.	Imp.	Exp.	Imp.
Share in the world's Exp. / Imp.	93.7	67.6	92.6	76.1	95.3	85.2	89.5	82.6

# RECOMMENDATIONS

1. Consider **alignment with existing sectoral initiatives on sustainability**
2. Consider **opportunities** in the **policy landscape**
1. Set a **structured engagement strategy**, which would look at:
  - a. **why** to engage and what it is the aim;
  - b. **whom** to engage with (the stakeholders groups /focus country);
  - c. **how** to engage Partnerships/Participation/Consultation/Communication
  - d. **which** concrete activities
4. Consider **mapping stakeholders within each value chain model** (fabric/fiber types/risk-based approach)



# Stakeholder ecosystem mapping

## NEXT STEPS

Fine-tune the **focus countries / regions – risk-based approach**

Elaborate **interdependencies** between stakeholders

Cluster main stakeholders groups according to **influence factors**

Formulate a **matrix** outlining recommended actions for each **stakeholders groups based on strategic importance and influence** under this project

## HOW TO CONTRIBUTE?

Review and share your inputs **by 15/05** on :

- Stakeholders Ecosystem Report
  - Focus countries / regions / risk-based approach / specific value chain model (per fabric/fibre types)
- Annex 1. Stakeholders in the Garment and Footwear Sector (*draft April 2020*)