

Publisher



ENTREPRENEURSHIP AND SUSTAINABILITY ISSUES
ISSN 2345-0282 (online) <http://jssidoi.org/jesi/aims-and-scope-of-research/>

ENTREPRENEURSHIP AND REGIONAL DEVELOPMENT: CASE OF FASHION INDUSTRY GROWTH IN SOUTH AFRICA

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Received 28 June 2015; accepted 10 August 2015

Abstract. The purpose of this paper is to share the experiential learning of working within the Creative industries within a local municipality. The Fashion Industry is a sub-sector of both the creative industries and the clothing and textiles industries, and provides opportunities for innovation and creativity in the manufacturing, textiles and apparel accessories. This paper looks at the policy imperative to intervene within the Creative industries at a local level and the institutional arrangements that govern the intervention strategy. The context of the industry prior to the key interventions and the growth over the support period is considered. The paper further explores key challenges in the implementation model, historically inherited weaknesses of the sector and critical impediments to an inclusive developmental focus. The paper proposes that the feedback loop and ability to redefine strategies for implementation can act to mitigate areas of stagnation, however stakeholder engagement and participation remains a key challenge given traditional and new partisan interests. The paper concludes by suggesting that the *special purpose vehicle model* for industrial development holds the best potential for impact and scope however the complexities of managing interventions within the creative context remains a restraining factor.

Keywords: Creative Industries, Fashion, Clusters, Local context

Reference to this paper should be made as follows: Fashion within the Local developing Context, A. Pather. 2015. Entrepreneurship and regional development: case of fashion industry growth in South Africa, *Entrepreneurship and Sustainability Issues* 3(1): 56-65.
DOI: [http://dx.doi.org/10.9770/jesi.2015.3.1\(5\)](http://dx.doi.org/10.9770/jesi.2015.3.1(5))

JEL Classifications: O3, L23, L26

1. Introduction

Entrepreneurship is one of the most important driving forces of regional development. Factors enhancing sustainability of entrepreneurial activities are being elaborated by scientists, policy makers, market participants and other stakeholders (e.g. (Laužikas, Mokšėckienė. 2013; Wahl, Prause 2013; Tvaronavičienė 2014; Figurska 2014; Wahl 2014; Tarabkova 2014; Caurkubule, Rubanovskis 2014; Lankauskienė 2014; Grubicka, J.; Matuska, E. 2015).

In this paper case study of peculiarities of fashion industry in South Africa is to be elaborated. We will tackle on the Ethekwini Municipality, which is the 2nd largest manufacturing hub in South Africa and the 2nd largest contributor to the economy of South Africa (KZN Top Business, 2015). Ethekwini is the largest metro in the

region of KwaZulu Natal (KZN), on the East Coast of Africa with its port city of Durban. The region has the highest unemployed and indigent population of South Africa. The City of Durban has a population of 3.34 million people. Within this context, a small rates base has to leverage services and opportunities across the various sectoral priorities, including the provision of basic services.

2. Context

2.1. Global

The Clothing and Textiles industry is a significant part of the global economy and is growing globally with consumer expenditure in the industry rising by 371.69% from 1995 to 2010. The global clothing and textile market is valued at around USD 400 billion and is expected to grow 25% by 2020 (Dhilwayo 2012).

2.2. National

The South African clothing, textile and fashions sectors are highly diverse in nature and comprise of a combination of both inexpensive, mass produced basics and higher, value-added fashion and tailored garments from specialised textiles. The declining value of the South African clothing and textile industry due to:

- Weakening Rand / Dollar Value;
- Global Recession
- High Labour costs
- Import bias
- The low availability of skilled and experienced labour;
- Limited Access to technology;
- Limited Access to raw materials by designers;
- Lack of access to support services for rural designers;
- Lack of international competitiveness;
- Funding and financing constraints.

This has resulted in a reduction in employment numbers in the sector from 106 898 (formal) sector employees in 1997 to 51 427 in 2012 (KZNFC BP, 2014). In KwaZulu Natal, clothing and textiles contributes 15% to the manufacturing sector, comprising textiles (54%) at R 1.6 billion and Clothing (27%) at R 0.6 billion (Stats SA, 2007). The period between 2002 to 2012 saw not only a rapid growth in the imports of fashion goods but a steady decrease in exports (KZNFC BP, 2014)

Nearly a third of South Africa's manufactured exports originate in KZN, however the weakening of the Rand led to high input costs as most of our textiles and trims are imported. This meant that the local industry couldn't compete with imports from China and which land in South Africa at a far lower cost than the local industry can produce.

National Policy Framework

Between 2003 and 2007 the National Department of Trade and Industry (DTI) introduced the Customised Sector Programmes (CSP 2003) which looked at the value chain of each sector and developed strategies to move the industries forward in a post-apartheid economy. The CSP first introduced the notion of Cluster Development and identified Fashion as a critical factor to the sustained development of the Clothing and Textiles industry; promoting provincial clusters funded by provincial and local government in order to benchmark and add value to firm level competitiveness.

Socio-Political

In South Africa, approximately 90% of the employees of this sector are women – indicating high potential for equitable and inclusive growth from this industry. This sector is extremely critical to the economic and social emancipation of this previously disadvantaged portion of the population and has been given priority through national government’s policy interventions. Therefore it is essential that focus be turned to growing employment numbers in the industry.

Local Context-eThekweni

The Fashion Sector is particularly relevant for the EtheKwini Municipality as it forms part of the value chain of the Clothing and Textiles, Leather and Footwear Sector which is the largest contributor to manufacturing sector which makes up the largest portion of the GDP in EtheKwini and is the biggest employer within the manufacturing Industries.

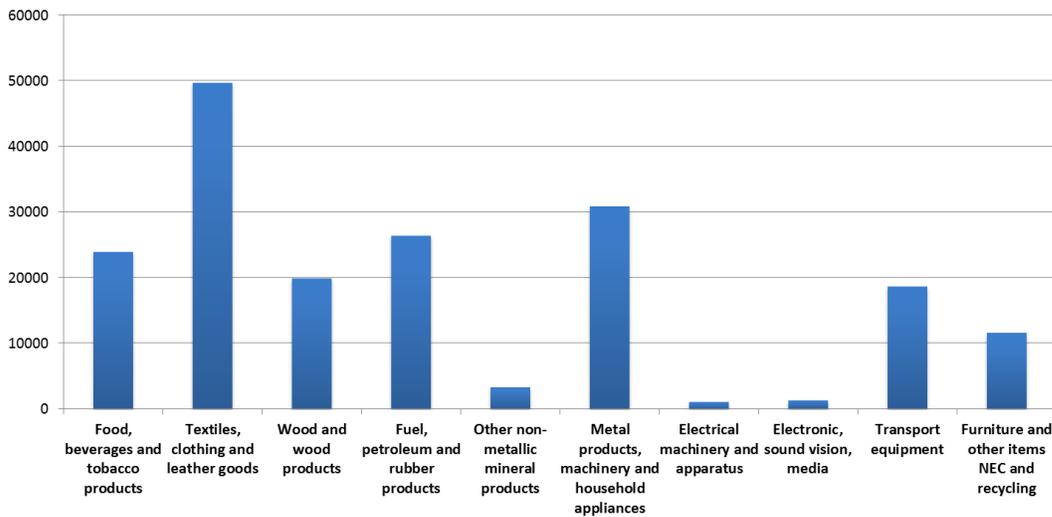


Fig 1. Textiles, Clothing and Leather goods is the highest contributor to employment in the manufacturing sector in EtheKwini

Source: PSIR, Datasets, 2015

The Economic Development Unit through the national industrial policy identified sectors and value-chains that had the most potential for labour absorption due to the low barriers of entry particularly given the low skills profile of the unemployed population within the metro region. While the fashion sector is a vital part of the Creative industries, it functions as the ‘*innovation aspect*’ (Pather 2015; ECOD Report, 2014) of the Clothing and Textiles value chain, which is key to the absorption of labour; due to its low entry level and its labour intensive nature, has the potential to employ high numbers of people. The current employment profile in the industry is predominantly black (African, Indian and Coloured) women.

Through the CSP and the work of Michael Porter’s ground breaking report on the Competitive Advantage of Nations, 1990, the city started working within the Cluster paradigm for industrial development in 2005, which was critical to the establishment of the Automotive Cluster and Clothing and Textiles Cluster. In 2009 the Department investigated the need to establish a cluster within the fashion Industry and undertook industry engagement. The KZNFC was established in 2009 and has started to develop an industry platform and network of designers across the municipality and the KZN region.

Prior to this, the industry was small and limited to a few designers with a label. Emerging young designers had no exposure at all. Numerous design schools produced graduates however support to designers into the market was limited. Input costs (materials and trims), infrastructure and lack of exposure at major retailers or boutiques made it difficult to establish a brand presence, which is a key driver in the industry. Access to other parts of the

value chain such as beadwork crafters or textile suppliers are difficult to reach for emerging designers and SMMEs without the support of an organisation like the KZNFC.

The need for an industry body was clear and established through these documents, which engaged the fashion industry at national provincial and local levels. The DTI promoted a strategic vision for the establishment of a South African National Fashion Cluster once the establishment of the 3 regional clusters (Western Cape, KZN and Gauteng) was fully functional.

Project managers were appointed to develop an industry Business Plan that took cognisance of the economic development needs of job creation and value chain alignment of government and the quality, training and data and technological needs of the industry- in various packaged programmes. While the development of this entity can be attributed to the city, the registration of the name played an important part in negotiating and leveraging a joint partnership with the KZN Provincial government which resulted in a 50/50 funding model developed since 2011. The Business plan is reviewed with Industry involvement on a 3 year basis which coincides with the medium term funding of the local ad provincial funders.

3. Interventions in Sector Development by the Ethekwini Municipality

The City's support of the KZN Clothing and Textiles Cluster since 2005 has brought about significant changes within the industry seen within the last year. Interventions of the cluster has influenced national grant funding to recapitalise the industry, and retailer lobbying based on a value proposition of the Quick Response Model as an alternative to bulk cheap imports has set the scene for increased demand in local manufacturing capabilities and therefore local design content.

To re-inject competitiveness into the industry- the opportunities and initiatives between both clusters (KZNCTC and the KZNFC) must be consolidated through increased and determined resource allocation and support (Gannon 2015). The KZNFC provides opportunities for local designers and manufacturers, which together with the assistance and the facilitation of the Council, must be synergised to achieve maxim benefit.

The KZNFC has extended support and integrated other promising players such as SMMEs, co-ops, designers as well as creating linkages between Cut, make and Trim (CMT's) and clothing and textile firms. The Council is mandated to address the challenges of SMME development, value chain linkages and transformation in the sector. The last funding cycle saw a real growth in the service delivered to the sector, a greater awareness and footprint created by the cluster, and support extended to designers across KZN.

3.1 Institutional Structure

The KZN Fashion Council structure is as a non-profit company in terms of the Company's Act of South Africa and has a Board of Directors. The board is made up of industry members, the position is voluntary. The funders sit on the Board as Ex Officio members. The Managing Director is appointed by the board and the rest of the organogram is appointed by the managing director.

A Memorandum of Agreement governs relationship between the Ethekwini Municipality and the KZNFC. This agreement sets out the deliverables and the responsibilities of the cluster in respect of the public funding it receives. The Agreement is based on the acceptance and interventions outlined in the Business Plan. The KZNFC is expected to manage the relationship with the funders who monitor and evaluate the delivery and expenditure on a monthly basis and at the Quarterly Board meetings. A separate agreement governs the relationship between the Provincial government and the cluster.

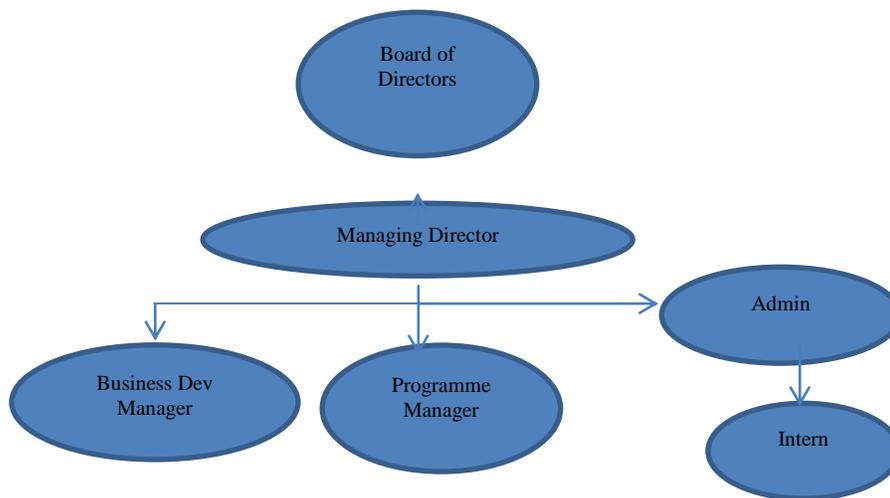


Figure 2

Source: Organogram, Strategy Report KZNFC, 2015

The Memorandum of Agreement has been signed for the next funding period 2015/16- 2017/18. The SPV has a Board of Directors with a skill related portfolio, CMT, design, Legal, Finance, Retail and Media. The funding support is on a rolling 3 year medium term budget. In year 3 the cluster undertakes sector research that engages the industry to secure the relevance of the interventions over the next period of funding. The last 3 year cycle focussed in developing a database of industry players including- labour, tertiary institutions, emerging and established designers, as well as creating value chain partnerships with the Clothing and Textiles Cluster and supporting institutions such as the national Department of Trade and Industry, provincial Trade and Investment KZN and national Department of Arts and Culture.

3.2 Programmes And Achievements

Since its inception, the KZNFC has run 3 Strategic Programmes:

- Networking & Learning;
- Market Access and
- Market Intelligence;
- *Fashion Hub*

3.2.1 Networking and Learning

The Council delivers revolving workshops in several districts around the province and the Ethekwini Municipality. The workshops achieve information sharing and brand awareness and well as recruitment for the council's database. The focus of the workshops in the outer-lying districts are on skills such as Hat-making, fabric dyeing and pattern-making- to enable sustainable businesses..

3.2.2 Market Access

In the 2013/14 Financial period, the Council increased its database of designers to 820 across the province and allied services to 492 members, popularised its website and developed a strong presence on social media- all of which allows young designers throughout KZN access to industry news and opportunities.

- facilitated the access of 28 designers to SA Fashion Week,
- Five (5) designers - chosen to stock a major retail chain store – Edgars, Sandton Johannesburg
- One young 1 designer is now exporting to Zimbabwe
- KZNFC designer won an international award- SAFW Lufthansa Young Designer Award at the national SA Fashion Week.

- Innovative pilot capacity building programme *21 Steps to Retail* (from pattern making to business)
- A quirky approach *Street Cred Competition*, which runs on social media. The competition encourages public participation through Facebook and Twitter. The project raises awareness of local designers, added a fun element to being fashionable on the street, and creates a buzz around the KZNFC brand.

3.2.3 Market Intelligence

The Council invested in the Worth Style Network (WGSN) trend software from 2012 which allows access to next season's trends, colour pallet and inspirations. This programme has been made available to districts on a rotating basis by linking with tertiary institutions and Local Economic Development offices

3.2.4 Fashion Hub

While this project is included under the KZNFC, it is externally driven through the Sector Programme's Department with national and provincial partners DAC, TIKZN and the **edeta**. Five (5) city owned green fields sites have been identified for this project and concept designs and bulk costings have been done. A service provider has been appointed to start the establishment of the entity and to begin programme development. The project was submitted to the Development Bank of South Africa (DBSA) and is awaiting a decision for packaging. The project cost is estimated at R71 million.

This project is to develop infrastructure for the Fashion Design industry by providing incubation space with access to machinery and technology at nominal costs that will enable business entrepreneurs to develop and grow their own brands. This inner city incubator and fashion hub with supplementary technical and business programmes can assist in the development and strengthening of the design part of the clothing and textiles value-chain. It will also be a point of contact for the industry for retailers and buyers and a research and development space.

4. Challenges

4.1 Competing Interests

In 2009 a sister Department of the Economic Development Department hosted a Business Fair which allows SMMES across the municipality to exhibit over a 3 days platform. The KZNFC partnered to host a Fashion Show to add to the programme content. This was done successfully and this partnership continued for 3 years.

Beyond 2011 the sister department Business Support, Markets and Tourism Units pursued this Fashion event until it has become a standalone event on the eThekweni calendar. This department has also begun an exchange project that takes young designers to Milan for 3 weeks to expose them to workshops and training. The development of these two projects has heralded challenges for the KZNFC due to the departmental decision to drive the projects without any relationship to the council. While initial discussions were held, there has been a failure to co-ordinate and develop a strong and synergistic working relationship.

Designers in eThekweni have been quick to access both opportunities. The Creative Industries from an implementing agency perspective brings together creative talent and particularly through showcases offers a glamorised environment albeit that these are generally trade platforms. This peculiarity has driven the actions on the side of vested interests given the high profile nature of a standalone event, from the implementing department. This approach has effectively divided rather than consolidated the City's interests and resources within this sector.

The result of this has been the perception of too many players in the fashion sector space in eThekweni, the disempowerment of the crucial role that the KZNFC was established to undertake and wasteful expenditure through a project and event led basis that does not develop the industry but contributes to a dilution of the quality and consistency required to develop ranges and the expertise it takes to showcase at provincial, national and international events. The industry has come out strongly to condemn the proliferation of fashion events which is a key reason South Africa does not attract international buyers. Further while providing showcases for young

and emerging designers is critical to their development, the lack of consistency, mentorship and linkages into the broader industry and value-chain and strategic sector development makes the showcase meaningless.

While it should not be the intention of the KZNFC to take ownership of every fashion event and project, the company is the mandated industry body to provide guidelines and mentorship to the industry and can and should be relied on to develop standards of quality for productions and ranges.

The establishment of a single entity was determined by the need to create a platform for the industry, a point of entry and to bring together what has been described as a fragmented industry. Ethekewini, had a major fashion event through the efforts of a private entrepreneur, the MTN Durban Fashion Week, this annual event is no longer being held. Small, stand-alone events and conflicting City supported fashion related events- that do not connect to the seasonal trends in fashion or have long term integrated sectoral benefit, have sought to further fragment and confuse the industry without having any positive impact.

The KZNFC was established through industry engagement and has a long term vision to develop the sector and contribute to the incremental growth of the industry by linking into the creative industries and the Clothing and textiles sectors. It has also directly responded to the issue of fragmentation by providing a platform through which all fashion related events can be delivered. The council is a regional body that serves as the umbrella body of support for the industry and has the functionality and industry linkages to deliver on an Annual Event that has long term impact consolidating the programmes that it already delivers and thereby positioning Ethekewini as a fashion destination internationally.

5. The Rationale For The KZNFC

Argument for the Cluster Model. “The set-up and support to industry clusters through the alignment of national, provincial and local Customised Sector Programme (CSP) initiatives is a vital intervention to creatively accelerate economic development in KwaZulu Natal. It has been particularly welcome in the fashion and design industry as a means to give recognition to the important economic and social contributions that emanate from the fashion and design sector. The establishment of the KwaZulu Natal Fashion Council is a significant milestone. It recognises the important opportunity for alignment within the sector, and specifically will seek to encourage stakeholders to adopt a more consistent and significant value aligned approach within the clothing value chain. It further recognises that a multi-sectoral commitment to value chain alignment is important for strengthening the social, economic and creative talents of emerging and established fashion designers to better contribute to sustainable economic development and enhancing the productivity and competitiveness of the industry in the short, medium and long term.” (KZNFC BP, 2011)

The KZN Fashion Council invokes an integrated strategy, and is committed to advancing the collective goals of the Clothing and Textile Cluster, the Craft Cluster and allied Provincial and Local Economic Development initiatives. It is an entity that seeks to encourage a transformational discourse within the sector, premised on principles of social inclusion, social and ethical accountability, good governance, access to opportunity and economic advancement.

VISION: KwaZulu-Natal Fashion Council is the institutional driver of innovative fashion and design in the province that creates a destination that is internationally competitive and sustainable, thereby creating a better life for all.

MISSION: The KZN Fashion Council (KZNFC) in pursuance of its vision seeks to effectively organise and coordinate development and support for the fashion and design sector that contributes to the competitiveness of the Clothing and Textile industry as a whole” (.KZNFC BP, August 2010)

The purpose of the funding is to support the competitiveness of the industry, in the broader sense, to the mutual benefit of the partners. The establishment of the (Non Profit) company KZN Fashion Council (KZNFC) is in line with national government’s sector partnership approach to industry development. This entity is the industry driver that has started to and will continue to develop and grow the sector.

The proposed 3 year business plan (Annexure B) has been developed through industry engagement at 4 targeted workshops and stakeholder interviews. The 4 core programmes 1) Market Intelligence; 2) Networking and Information Sessions; 3) Business and Skills Development and 4) Access to Markets and Industry Partnerships- aim to strengthen and consolidate the work that has been achieved to date and concentrate on bridging gaps that have been identified through constant learning and feedback.

The next 3 year phase unpacked in the Business Plan will see programmes entrenching development support and starting to realign our young entrepreneurs for the export market aiming at SADAC, BRICS, Australia- now that a national South African retailer has a significant retail space in that market as well as tested opportunities like Berlin and Switzerland- established and developed to improve the productivity and competitiveness of the industry in the short, medium and long term.

6. Conceptual Model

In key mature industry sectors, the cluster formation has driven growth, competencies and competitiveness. However with fledgling industries the approach needs to be more nurturing. The model that has been used here therefore is one of driving the industry through programmes, projects and networking to enable it to strengthen and grow its own impetus (Pather, A. ECOD report, 2011).

The KZNFC non-profit company is the entity that responds to the model of international best practise which informs us that a local special purpose vehicle in partnership with key stakeholders from the industrial sector and different tiers of government is best suited to unlock developmental opportunities (Arjunan 2010). This industry body whilst still accountable to government as a key funder has the freedom to engage directly with all stakeholders and focus all its efforts in the implementation of key interventions that will provide the best options for its membership. Furthermore while core funding comes from the governmental partners the organisational structure of the Council allows it to pursue partnerships with independent agencies, organisations and industry to leverage resources including alternate funding for its projects and programmes towards the development of the sector. In the 2013/14 financial year, **R1 092 944 million** in sponsorship was leveraged by the KZNFC through the private sector for its programmes.

The work that the KZNFC has been engaged in has made significant impact in the industry and has started to establish a pool of young talent that is getting recognised for its talent and skill through consistent exposure to training, skills development, business development and market -all of which is driven through targeted data gathering and constant feedback from the industry. This feedback loop is on-going within the cluster model and therefore relevant and directly responsive to the needs of the industry.

“The Cluster approach is the action research model in its functional form”
(Pather 2015)

The monitoring and evaluation that is also intrinsic to the manner of establishment through a governmental entity in this case the Ethekwini Municipality strengthens the veracity of the initiative. The development of the sector has a threefold agenda – growth, employment and competitiveness.

By intervening in the Fashion industry, government has the opportunity to pursue this agenda and achieve transformation in the process. The KZNFC will develop the sector by focusing on:

- i) Added Economic Value
- ii) Employment for the Marginalised
- iii) Design: A Source of Competitiveness
- iv) Developing Durban as a ‘Fashion Destination’

The KZNFC acts on the **Key Action Programme 4** of the Clothing and Textiles CSP as it relates to “innovation, design and value addition”. In order to improve operational competitiveness to world class performance levels it is necessary to develop and enhance innovation, creativity, lead time reductions and locational advantages, which will be done through the creation of a fashion design platform for the region.

The Economic Development Unit of the Ethekwini Municipality is working on developing the supporting infrastructure for the Fashion Sector the Durban Fashion Hub, which will ensure that there is an integrated sectoral approach to the development of this key sector.

Cluster model as international best practise for industrial development

- Clusters are either geographical concentrations or virtual platforms of sector specific businesses or sector value chains
- In Clusters- networks are enhanced to support co-operation through partnerships with value chain members, tertiary institutions and public bodies
- Successful Clusters can catalyse improvements in productivity, through increases in efficiencies and quality.
- Clusters provide an environment conducive to new enterprise development, and strengthens the interface between research and its application enabling rapid innovation.
- Clusters are able to make co-ordinated input into policy process, increasing the effectiveness of the outcomes and concentrate forms of government and private sector support to facilitate optimal use of incentives and services
- This model has been assessed by the DTI and National Treasury as a successful approach to industrial development and helping overcome the challenges that the manufacturing sector faces
- This model is internationally benchmarked and recognised by the World Bank, Unido, the ILO, OECD and UNCTAD
- The Cluster programmes have influenced the trajectory of the manufacturing sectors towards growing efficiencies competitiveness and productivity

(ERLN, Issue 2)

Conclusion

Within the creative industries there are driving forces beyond socio political and contextual needs. The individual aspirations and adjacent agendas of co-mandated departments/entities coupled with the personalisation of the creative talent can destabilise sectoral economic initiatives.

Practitioners need to be mindful of the glamorisation pull of the fashion industry that could override economic and industrial policy imperatives in favour of individual agendas.

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