

AFRICAN CLOTHING & FOOTWEAR RESEARCH NETWORK

Fashion and the Growth of 'African' Brands in South Africa

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FASHION AND THE GROWTH OF ‘AFRICAN’ BRANDS IN SOUTH AFRICA

ABSTRACT

This report provides a summary of the research undertaken and completed with the financial support of the African Clothing and Footwear Research Network. The objective of the research is to examine the recent growth of new fashion brands of clothing which have been established by black South African entrepreneurs and which often reflect a Pan-African style. Over the last decade the emergence of a new cluster of black individual designers and design houses has occurred primarily in and around Johannesburg, South Africa's largest, most economically vibrant city. Through an analysis of the growth of the new fashion brands within the design and fashion cluster of Johannesburg the project examines the factors that encourage the local development of creative industries, such as fashion. In addition, key challenges that face new fashion enterprises are examined.

1. Aim and Structure

This report provides a review of the research undertaken¹ and completed with the financial support of the African Clothing and Footwear Research Network. The aim in this research is twofold.

- First, is to examine Johannesburg's emergence and planning as an international fashion centre, including of important developments taking place at the fashion district.
- Second, is to examine the different trajectories of firm development and problems of fashion and design enterprises. This latter task involves analysis of the growth of new fashion brands of clothing which have been established by several black South African entrepreneurs and of the problems faced by young designers seeking to develop their own labels.

This report is organised into several sections of discussion

¹ This research report was prepared by C.M. Rogerson but reflects also the research contributions provided by Ms Nadya Bawa who was a research assistant attached to this project.

- Section 2 provides a synthesis of the background literature to this project. It reviews existing (limited) international research on the fashion industry and creative industries.
- Section 3 furnishes a review of the South African context to this project in terms of the restructuring of the clothing industry, the importance of Black Economic Empowerment as a policy issue and of the situation of creative industries nationally.
- Section 4 provides details of the research methodology of the project.
- Section 5 provides a profile of research findings which are organised into four sub-themes of discussion concerning, *inter alia*,
 1. Policy Initiatives and the Environment Concerning Creative Industries in Johannesburg
 2. Policy Initiatives concerning Fashion and the Fashion District in Johannesburg
 3. The Emergence of African Brands through the Three Case Studies
 4. The Struggle Below: Emergent Fashion Designers
- Section 6 gives a listing of References.

2. Literature Review and Context

Research on the emergent black fashion designers and design houses in South Africa can be linked to various existing sets of literature. Two sets of existing scholarship provide the context for this investigation:

- An international literature on fashion and the upgrading of fashion clusters; and
- The international literature on creative industries.

The core themes in these sets of literature which provide the context for this research investigation are highlighted below.

2.1 Fashion and Fashion Clusters

This section provides a review of existing international literature concerning (1) fashion and fashion clusters; and (2) the concept of creative industries

Within the international literature on global commodity chains it has been observed that a fruitful theoretical approach to the analysis of changes in the global clothing economy is through a focus on “the concept of power within the networked relationships” (Tokatli and Kizilgun, 2004, p. 223). Several studies underscore and confirm the importance of understanding the uneven nature of power relationship in the global clothing economy, in particular between the dominant players in terms of the world’s largest retailers and brand marketers on the one hand, and geographically dispersed manufacturers on the other (Bonacich and Appelbaum, 2000; Crew and Davenport, 1992; Crewe and Forster, 1993; Gereffi, 1999; Gereffi *et al*, 2002; Hassler, 2004; Webber and Weller, 2001). Large retailers and branded marketers and manufacturers without factories essentially have been shown to control global networks through their capacity to shape consumption via mass brand names (Dicken and Hassler, 2000; Hassler, 2003a, 2003b; Rosen, 2002; Tokatli and Kizilgun, 2004).

It has been argued that within the global economy a critical source of power derives from such factors as high value research and design. Indeed, several studies point to the critical importance of ‘brand rents’ within the structure of global clothing (Gereffi, 1999; Hassler, 2003a). It is evident that “powerful corporations constantly try to use fashion as a tool and dictate fashion trends” as a form of “planned obsolescence” to use the words of Agins (2000) as well as for “creating identities through advertising” (Tokatli and Kizilgun, 2004, p. 229). For Agins (2000, p. 7) fashion is by definition “ephemeral and elusive, a target that keeps moving”. Fashion is a critical element in the global clothing economy and a crucial source of power. Such leading firms in the international clothing economy, as Wranglers, Esprit, Calvin Klein, or Levi Strauss, “control fashion knowledge as well as brands” (Tokatli and Kizilgun, 2004, p. 229).

For clothing producers in peripheral places in the global economy, including Africa, upgrading is often inhibited by these existing power relations around fashion and branding. Nevertheless, there are certain examples of producers, based outside the major power centres in clothing which have managed to capture ‘real rents’ through the design, marketing and retailing of products. One of the best examples is, perhaps, that of Erak clothing, a Turkish company based in Istanbul which created its own brand, Mavi Jeans, in 1991 “which is now sold at more than 3,000 sales points, including Nordstrom, Macy’s and Bloomingdales department stores, and five directly owned and operated flagship stores in Vancouver, New York, Frankfurt, Berlin and Montreal” (Tokatli and Kizilgun, 2004, p. 222).

In terms of our specific understanding of ‘fashion’ there is an important global literature which examines the “fashion chains” as part of the wider growth and development of a set of ‘cultural products’, part of the wider category of ‘creative industries’ (Crewe, 2004; Leslie and Reimer, 1999). Of note, also, is the enterprise study of the Zara fashion company by Bonnen (2002). Recently, the fashion industry has been conceptualised by Alan Scott (2004) as part of a wider category of ‘cultural-products industries’ which are rooted upon the development of local creativity and design. The importance of design and of creation in the construction of “fashion” aligns the production of individualised or style garments firmly as part of the group of ‘creative industries’, which would include also the production of music, film or publishing (Leslie, 2005). In terms of fashion clusters there are a number of existing studies which deal at a global scale with the historical development of luxury fashion (Djelic and Ainamo, 1999), most importantly the works of Santagata (2002) and the EBLA Centre in Turin. At a localised level, investigations have appeared on the dynamics of designer or luxury clothing in Paris (Crane, 1997; Santagata, 2002), Hong Kong (Skov, 2002), New York (Rantisi, 2002a, 2002b) and Southern California (Scott, 1996; 2002) as well as a small stream of work specifically on fashion retailing (Crewe, 1996; Crewe and Beaverstock, 1998). In the developing world one of the few existing studies concerns clothing and fashion clusters in Colombia (Pietrobelli and Barrera, 2002).

2.2 Creative Industries

Fashion is increasingly conceptualised as part of a wider category of ‘creative industries’. As Smith (2005) reflects, creative industries are used increasingly “as tools for the regeneration and transfiguration of urban space of consumption”. The concept of ‘creative industries’ represents “a quite recent category in academic, policy and industry discourse” (Cunningham, 2003, p. 1). It has been argued that the formal origins of the concept can be found in the Blair Labour Government’s establishment of a Creative Industries Task Force (CITF) after its election in Britain in 1997 (Flew, 2002). The Creative Industries Mapping Document, which was prepared by the newly constituted Department of Culture, Media and Sport (1998), defined creative industries “as those activities which have their origin in individual creativity, skill and talent and which have the potential for wealth and job creation through generation and exploitation of intellectual property”. The boundaries of ‘creative industries’ are not always tightly defined. Wood and Taylor (2004, p. 389) go so far as to argue that defining creative industries “is a task fraught with methodological and semantic challenges”. The UK CITF identified as many as thirteen different sectors that were to be encompassed within the framework of ‘creative industries’ (Table 1).

Table 1: Creative Industries in the United Kingdom

<ul style="list-style-type: none">• Advertising• Architecture• Arts and Antique Markets• Crafts• Design• Designer Fashion• Film	<ul style="list-style-type: none">• Interactive Leisure Software• Music• Television and radio• Performing Arts• Publishing• Software
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Source: Department of Culture, Media and Sport, UK, 1998

As Flew (2002, p. 5) asserts, “such listings inherently carry an *ad hoc* and pragmatic element to them”. Likewise, Cunningham (2003, p. 1) criticises the CITF listing as

“eclectic”. In a more analytical fashion, the economist Caves (2000, p. 1) sought to define creative industries in the following terms: “Creative industries supply goods and services that we broadly associate with cultural, artistic, or simply entertainment value. They include book and magazine publishing, the visual arts (painting and sculpture), the performing arts (theatre, opera, concerts, dance), sound recordings, cinema and TV films, even fashion and toys and games”. Since 2000, several other researchers have sought to modify these definitions and offer varying sectoral listings of creative industries; most frequently, these lists include film and television, arts, crafts, music, media, and designer fashion; sometimes, they extend to include even the activity of tourism as a whole rather than just ‘creative tourism’ (Evans, 2005).

The scholarship on creative industries essentially builds upon earlier thinking on ‘cultural industries’ (Flew, 2002) and in particular of the challenges raised by Richard Florida’s (2002) book, *The Rise of the Creative Class*. The major contribution of Florida (2002) was to unsettle conventional notions of culture and creativity “as frivolous and derivative, as something that is nice to have, but not important to nuts and bolts economic development” (Leslie, 2005, p. 403). Indeed, Florida’s work (2002) demonstrates that creativity and culture can have economic benefits and that creativity and economy are inextricably woven together. In recent years, research interest concerning the development of creative industries has burgeoned and a vibrant set of debates has emerged particularly around creativity, clusters and industrial districts (Bilton and Leary, 2002; de Berranger and Meldrum, 2000; Brecknock, 2004; Caves, 2000; Caves, 2003; Flew, 2003; Florida, 2002; Hall, 2000; Landry and Bianchini, 1995; Santagata, 2002; Santagata, 2004; Turok, 2003; Scott, 1996). In particular, Scott (2004, p. 463) draws attention to the growth of the new creative economy and of rising levels of optimism surrounding ‘cultural-industrial districts’ as “drivers of local economic development at selected locations, above all in large cosmopolitan cities, but also in many other kinds of geographical contexts”. Creative industries are characterised by, *inter alia*, extensive networking, self-help and collaboration, ‘flat hierarchies’ and partnerships, and the domination of small and micro-enterprise (Evans, 2005; Meethan and Beer, 2005).

Another common feature is a locational preference among certain segments of creative industries for central or inner-city locations rather than peripheral areas (Newton, 2003).

Despite definitional controversy, over the last few years creative industries and creative districts, undoubtedly, “have become a major new consideration in urban economics and city politics” (Brecknock, 2004, p. 1). At a national level, the creative industry of designer fashion came under the spotlight in both the United Kingdom and New Zealand during the 1990s. Unprecedented attention was accorded to designer fashion by the media and national government in campaigns such as ‘Cool Britannia’. Moreover, it has been observed that fashion was assigned “the dual tasks of economic development and re-branding New Zealand as a creative talented nation” (Bill, 2005, p. 7). For some scholars, whole cities are now called upon to re-invent themselves as ‘creative cities’ (Landry, 2000). In particular, the English town of Huddersfield, a former woollen mill town, has sought to transform itself through its Creative Town Initiative (Wood and Taylor, 2004).

Policy initiatives to support or nurture the category of creative industries have been launched by several cities including Brisbane, Berlin, Barcelona, Dublin, Helsinki, Manchester, Milan, Tilburg and Toronto (Cunningham, 2003; Flew, 2002; Hall, 2000; Leslie, 2005; Scott, 2004). In addition, the Canadian city of Montreal aims to position itself as “a design metropole” (Leslie, 2005). Many cities plan strategically to enhance the growth and development within cities of ‘creative spaces’ (Dabinett, 2004; Evans, 2005; Scott, 2004). It has been pointed out, however, that some of the most well-known creative districts – such as Soho in New York City or Montmartre in Paris – were never planned; rather “they emerged spontaneously from currents of dissent, conflict and collision present in cities of disorder” (Leslie, 2005, p. 405).

A critical set of international debates are beginning to surface concerning the ‘local conditions’ which facilitate the development of ‘creative clusters’ and of ‘creative cities’ (Bell and Jayne, 2003; Brecknock, 2004; Hall, 2000; Landry, 2000; Landry and Bianchini, 1995). In an important contribution, Pratt (2004) argues that creative clusters are formally a set of business clusters. Internationally, Evans (2005) considers that

creative industries are now identified as an economic cluster. For localities that host significant concentrations of these creative industries, Wu (2005, p. 3) stresses that the “beneficial impacts are tremendous” especially in respect of local growth potential. Commonly, creative industries are added to a list of ‘leading edge’ or ‘growth sectors’ such as financial services, ICT or high-technology, which signals the strength and potential of a local economy (Evans, 2005).

Several factors are identified as important influences upon the emergence of dynamic creative clusters, including local innovation capacity, availability of venture capital, the role of institutions in mediating collaboration, an appropriate skills and knowledge base, and targeted public policies (Wu, 2005). For Meethan and Beer (2005) creative industries thrive on innovation, mobility and flexibility. The growth of ‘creative spaces’ and ‘creative industries’ is also viewed as linked critically to the factor of market demand. Sustaining the development of creative industries, Evans (2005, p. 7) argues, requires a growing local economy, affluence and investor confidence. From the international experience it is contended that “cities need to build institutional and political mechanisms that nurture creativity and channel innovation” in order to sustain creative clusters (Wu, 2005, p. 7). In addition, considerable significance is attached also to the imperative for increased collaboration between the different creative industries sectors. Nevertheless, it is recognised that the greatest scope for growth and innovation exists between creative industries and other sectors, including tourism (Evans, 2005, p. 7). It is against this background that the discussion turns to review the South African record.

3. The South African Context

At the South African level, the growth of a specialised cluster in and around Johannesburg of black designers and design houses can be understood in relation to (1) debates about black economic empowerment in South Africa, and (2) restructuring trends in the local clothing industry. In addition, the debates around ‘creative industries in South Africa’ and creative industries in Johannesburg are analysed.

3.1. Restructuring the South African Clothing Economy

Since the early 1990s the South African clothing industry has been strongly affected by the impacts of globalisation and of trade liberalisation (Gibbon, 2004; Kamaha, 2004; Kaplan, 2004; Salm, 2002; Williams and Hanival, 1999). Of greatest significance is the emergence and consolidation of new global production regimes for clothing goods in which transnational production networks are coordinated spatially to allow specialised functions to be carried out in different countries (cf Gereffi, 1994, 1999; Gibbon, 2002). Overlapping the impress of the making of these global production networks has been the consequences of the era of trade liberalisation in post-1994 South Africa which was heralded by the democratic government's offer to GATT (Dunne, 2000; House and Williams; Jafta and Jeetah, 2001; Kaplinsky and Morris, 1998; McCormick, 1999; 2001). Taken together, trade liberalisation and globalisation have precipitated a "steep learning curve" for South African clothing enterprises, traditionally protected by high tariff and non-tariff barriers from overseas competition, which are compelled now to compete with international suppliers in the domestic market as well as in neighbouring countries and abroad (Fakude, 2001, p. 5).

During the first decade of democracy it is evident that the clothing sector in South Africa has undergone a metamorphosis as a "protected domestic market dominated by domestic manufacturers has given way to a market which is increasingly exposed to international competition" (Harrison and Dunne, 1998, p. 45). Considerable and rapid changes therefore have been taking place in the size, organisation and complexion of South African clothing manufacture since 1994. These have been reviewed in considerable detail by Salm (2002), Barnes (2004), Gibbon (2004) and Rogerson (2004a) and will not be presented here. Overall, the most important change has been the rapid decline in both output indicators and levels of employment of the clothing sector at national level. As Barnes (2004, p. 11) points out in South Africa "although the clothing industry has not performed well recently it is important to reiterate its labour-intensiveness and the fact that it employs over 120,000 people". Accordingly, "it is essential that policies and interventions be put in place to secure the sector's growth and development, or that at least limit the losses that are likely to occur over the next few years. In this regard, policy

needs to be directed at first stabilising the industry and re-establishing its foundations, and then providing an enabling environment for its future growth” (Barnes, 2004, p. 11).

Notwithstanding the decline in performance, the importance of the clothing industry is underlined by the fact that the national Department of Trade and Industry has targeted it as one of its selected priority sectors which have been identified in the government’s Micro-economic Reform Strategy and the DTI’s Integrated Manufacturing Strategy (Machaka and Roberts, 2004). In terms of responses to decline there appear to be emerging certain significant regional or local responses to decline. In the Western Cape and KwaZulu-Natal provincial initiatives are supporting clusters through fostering joint action between firms to achieve economies of scale and to facilitate knowledge enhancement through the exchange of expertise (Barnes, 2004). In Gauteng province, which is the third most significant cluster for clothing production in South Africa, there has occurred a revival of the local clothing economy which in part is based upon the encouragement of new black clothing designers and fashion producers. Historically, the clothing industry in Johannesburg competed in narrow buyer-driven clothing value chains that provided the supply lines to major South African retail chains. As a result of trade liberalisation and South Africa’s re-integration into global markets, these retail chains are now no longer sourcing their requirements locally (Rogerson, 2004a). It is thus recognised that the future prosperity of the local clothing economy lies in value-added design and manufacturing around certain niche products and markets which are viewed as having a real long term potential to penetrate specialist local, regional and international markets. At the heart of this is the repositioning of the local clothing economy and the encouragement of new African design and apparel. Indeed, in the sector policy overview of clothing that was recently produced by Barnes (2004, p. 12) in order to enhance competitiveness of the industry, considerable emphasis was placed on the need to develop a South African/African clothing brand.

3.2 Black Economic Empowerment

Redressing the apartheid-inherited legacy of the domination of business activities by white business and the exclusion of black South Africans from the mainstream of economic activity was one of the key visions as articulated by the Reconstruction and Development Programme, the blueprint document for the country's democratic transformation (ANC, 1994). Indeed, it is now officially acknowledged that under apartheid there occurred a process of systematic disempowerment; "the accumulation process was one of restricted wealth creation and imposed underdevelopment on black communities to ensure that they were, in the main, suppliers of cheap labour" (DTI, 2003, p. 6).

Since the early 1990s there has occurred a gathering momentum behind a body of initiatives that support black economic empowerment, seeking to counter the systematic exclusion of the majority of South Africans from full participation in the country's economy (DTI, 2003; Thale, 2004). Black economic empowerment is an umbrella term that is applied to encompass a wide variety of measures that have been pursued by South African businesses and government bodies seeking to redress the economic inequalities that are the legacy of the apartheid past. It has been argued recently that Black Economic Empowerment "may come to constitute what has been described as South Africa's 'second revolution'" (Christianson, 2004, p. 104). This 'revolution', however, has not been sudden and violent, rather it has been characterised as "deliberately evolutionary, incremental and law-bound", features that are considered to be major achievements of the first decade of democratic government in South Africa (Christianson, 2004, p. 104).

Some observers locate the origins of Black Economic Empowerment as early as the 1970s and 1980s with the activities of the National African Federated Chamber of Commerce to nurture black business or of the emergence of black management professionals (Daniels, 2004). Most analysts, however, track the road to empowerment as beginning "roughly around the early 1990s with the sale of equity stakes in companies, such as Metropolitan Life and others to black business consortia" (Bukula, 2004, p. 16).

Christiansen (2004, p. 106) points out “What these deals had in common is that they were all a part of the longer term strategies of the white-owned corporate partners” which “intended creating allies in an environment perceived as potentially unfriendly”. In terms of the so-termed ‘long haul’ to empowerment Bukula (2004, p. 16) goes further in arguing that these efforts, driven entirely by white business, potentially “were designed merely to calm the empowerment tiger, to pre-empt efforts that would accelerate the empowerment ship so fast that it would cause discomfort in some quarters”. Certainly, it is evident that the structuring of these deals “left much to be desired” as the new black equity holders “mostly pledged to pay for their holdings out of future earnings and were secure so long as share prices were rising” (Christiansen, 2004, p. 106). With the onset of Asian market crisis of 1997 and falling stock markets the new black owners were left highly indebted (DTI, 2003, p. 10). For critical observers, this form of ‘Trojan horse’ empowerment strategy now “was in disarray and the first generation of empowerment champions were looking somewhat tarnished” (Christiansen, 2004, p. 106). Overall, this initial wave of empowerment initiatives enjoyed little success in changing the numbers of black people participating in the South African economy through ownership, control and management of productive assets. Further, considerable disquiet also surrounded white corporates driving an empowerment agenda in which black business and government played no meaningful role.

At the November 1997 conference of the Black Management Forum (BMF) these issues were the focus of debate. This was a watershed meeting in the development of Black Economic Empowerment. Bukula (2004, p. 17) records: “The sentiment at the conference was clear: black people should direct and take charge of a new vision for black economic empowerment. In addition to this concern, the discussion was triggered by concern over two other important issues. Firstly, black business was not happy that empowerment was narrowly defined to mean arms-length acquisition of equity stakes by a few blacks in a few established companies. The vision of empowerment had to be much broader. Secondly, there was lack of a commonly agreed definition or benchmarks for BEE”.

The key outcome of the BMF Conference was the conceptualisation and birth of the Black Economic Empowerment Commission (BEECom), under the chairmanship of Cyril Ramaphosa. BEECom was established in response to mounting concerns about the slow pace and poor results that had been attained by existing BEE initiatives and was formally constituted in May 1998 (Thale, 2004). The commission set about conducting research and consulting stakeholders, a process which culminated in September 2000 with the tabling of its findings, subsequently consolidated and published during 2001 (Black Economic Empowerment Commission, 2001). The recommendations of BEECom have been highly influential and served to inform the bulk of a flurry of new policy and legislative initiatives and pronouncements which were made concerning Black Economic Empowerment over the period 2002-2004.

The BEECom made several important contributions to the BEE process and debate in South Africa (see Black Economic Empowerment Commission, 2001; Bukula, 2004; Christianson, 2004). First, it crucially defined BEE in the broadest terms possible, embracing equity, human resource development and socio-economic development in both its urban and rural forms. Second, the commission was instrumental in taking the initiative to refine concepts such as a “black company”, which now refers to an enterprise that is 50.1 per cent owned and managed by black people (Thale, 2004). Third, the report was notable for presenting “in the clearest form up to that time, the argument that expanding the market by bringing in the previously excluded was the way to grow the economy” (Christianson, 2004, p. 107). Fourth, the commission recommended the establishment of a statutory BEE Council with powers to enforce BEE across the economy. Finally, the commission called for legislation designed to ensure the effective implementation of BEE in terms of requiring the private sector to agree on industry-specific targets for a number of BEE indicators which would be incorporated as Industry Empowerment Charters. Overall, the essential thrust of the BEE proposals is viewed by most observers as ‘a market-friendly approach’ with the underlying assumption that growth of the South African economy is best achieved and most sustainable if driven by the private sector and that black people need to be drawn more thoroughly and comprehensively into the economy (Bukula, 2004). Indeed, implicit in this approach is

the notion that this market-friendly approach towards empowerment is the most effective means of addressing poverty, unemployment and economic marginalisation (Christianson, 2004).

Although the BEECom interventions have been extremely influential, not all of them have been taken up by national government in terms of subsequent policy and legislation. During 2003 the Department of Trade and Industry released a “comprehensive and focused strategy for broad-based economic empowerment”. The rationale for introducing such a “transformation imperative’ in South Africa was argued as follows: “Despite the economic successes and a broad range of state policy, strategy and programme interventions aimed at overcoming economic disparities, entrenched inequalities continue to characterise the (South African) economy and act as a deterrent to growth, economic development, employment creation and poverty eradication” (Department of Trade and Industry, 2003, p. 5). In addition, it was argued that support for black economic empowerment was “more than just an economic imperative, the deracialisation and engendering of our economy is a moral requirement in keeping with the values and principles of equity enshrined in the Constitution” (Department of Trade and Industry, 2003, p. 6). In line with these policy statements, the government introduced a Broad Based Empowerment Bill in 2003 to promote economic transformation in order to increase the effective participation of black people in the economy. This was formally gazetted in January 2004 and signed into law by President Mbeki (Republic of South Africa, 2004).

The Empowerment Bill states that its aim is “to establish a legislative framework for the promotion of black economic empowerment; to empower the Minister to issue codes of good practice and to publish transformation charters; to establish the Black Economic Empowerment Advisory Council; and to provide for matters connected therewith” (Republic of South Africa, 2004, p. 2). Importantly, the Bill adopts the language and definition of ‘broad-based empowerment’ in terms of seeking a wide base of beneficiaries rather than the creation of a black elite. Implicit in the government’s acceptance of BEECom’s broader definition of empowerment was that support of small and medium-sized

enterprises would be an essential component of strategies for Black Economic Empowerment (Haffajee, 2003).

Finally, in terms of promoting empowerment, it should be noted that the national government has sought to align current and new financing support mechanisms, operated especially through the Department of Trade and Industry (2003, pp. 28-34). These changes in financing were undertaken due to recognition that existing SMME support financing systems largely had by-passed black entrepreneurs, most especially those living in rural areas (Berry *et al*, 2002). Indeed, awareness of government support policies for enterprise development was extremely poor (Berry *et al*, 2002). Beginning in 2003 the DTI has introduced a suite of new financing programmes which are targeted to support black entrepreneurship, most notably the Empowerment Scheme Credit Guarantee Scheme and the Black Business Supplier Development Programme (BBSDP). Illustratively, the BBSDP is an 80:20 percent cost-sharing cash grant incentive scheme that finances enterprises that are majority black-owned and have been in existence for at least one year of operations and designed to enhance their access to business development services (Department of Trade and Industry, no date). Further support for Black Economic Empowerment in its broad-based form is contained in the DTI's Integrated Small Business Enterprise Strategy which is scheduled for release in late 2006.

3.3. Creative Industries in South Africa

The terminology of the 'creative city' was first introduced into the lexicon of South African development scholarship by Dirisuweit (1999) in her work on culture and economic development in Johannesburg. Nevertheless, by 2005 it could be observed that the term 'creative industries' had been little utilised in national level policy debates on South African economic development. One possible reason for neglect was suggested by Minty (2005, p. 5) as a consequence of the fact that "the creative industry in South Africa – and thus to a large extent the symbolic economy – is the least transformed in the country". Moreover, at present, there exists little systematic published research on the organisation or workings of so-termed 'creative industries' in South Africa. Indeed, there

has been no real parallel in South Africa to the British Creative Industries Task Force, or to the emergence of the sorts of vibrant discussions that operate at national level in Australia, New Zealand or the UK about harnessing the developmental potential of creative industries.

That said, what has emerged in post-apartheid South Africa is a growing recognition of the significance of the parallel (and sometimes overlapping) notions of ‘cultural industries’ (Dirsuweit, 1999; Minty, 2005). The importance of promoting cultural industries in South Africa and their potential for economic development was signalled in 1998 by the appearance of a series of reports produced by the Cultural Strategy Group (1998a, 1998b) for the (former) Department of Arts, Culture, Science and Technology. The category of ‘cultural industries’ was defined broadly to incorporate music, the visual arts, the publishing sector based on creative writing of literature, the audio-visual and media sector, performing arts, the craft sector (including traditional African art, designer goods and souvenirs); cultural tourism, and, the cultural heritage sector. In addition, the Cultural Strategy Group (1998a) also included within cultural industries the sectors of design and fashion which were seen as “sectors where creative input is a secondary but critical means of enhancing the value of other products whose marketability and effectiveness would otherwise be lessened”.

The series of research reports generated by the Cultural Strategy Group are highly relevant for the creative industries. The core objective of the Cultural Industries Growth Strategy (CIGS) was of “integrating arts and culture into all aspects of socio-economic development” (Newton, 2003, p. 25) in South Africa. In particular, the Cultural Strategy Group produced detailed reports and recommendations for supporting craft (Cultural Strategy Group, 1998b), film and video (Cultural Strategy Group, 1998c), music (Cultural Strategy Group, 1998d), and publishing (Cultural Strategy Group, 1998e) industries. Taken together, this body of research identified major problems currently facing the development of the core segments of South African cultural industries. Key cross-cutting issues for enterprise growth were recognised as a lack of adequate skills, difficulty of market access, and a lack of innovative product development (Create SA,

2005). While differentiated for the various sectors under investigation, the major suggested strategic interventions included:

- Education and training to improve skill levels
- Market development and facilitation of market access
- Co-ordination of government initiatives
- The development of partnerships at all levels to implement joint projects; and,
- Advocacy for cultural industries (Newton, 2003)

Overall, the so-termed ‘Creative South Africa’ initiative sought to introduce and demarcate “cultural industries as an important sector in its own right” (Cultural Strategy Group, 1998a, p. 7) in terms of national policy debates. The results of this project were directed explicitly at National Government and sought to forge awareness within Government about the potential of cultural industries for growth, job creation and enterprise development. Since 1998 it must be observed that there has occurred little movement in terms of national support initiatives for so-termed cultural industries. In large measure this is because core responsibility has rested with the little-resourced Department of Arts and Culture (DAC). The limited available support from DAC has been channelled towards developing public-private partnerships and initiatives using culture as a tool for urban regeneration with a special poverty relief allocation which seeks at “providing access to skills and markets as a tool for urban regeneration, rural development, and job creation” (Department of Arts and Culture, 2004, p. 4).

The greatest success of the Creative South Africa initiative has been recorded in terms of strategic awareness-raising among policy-makers within national government. In 2002 the Integrated Manufacturing Strategy (IMS) was issued by South Africa’s Department of Trade and Industry (DTI). The IMS constitutes a collective government position aimed to coordinate a set of actions across government and geared primarily at improving competitiveness across the national economy. The IMS takes off from the government’s Microeconomic Reform Strategy which set forth a vision for a restructured and adaptive economy characterised by growth, employment equity, built upon the full potential of

persons, communities and geographic areas (Machaka and Roberts, 2003). Of greatest significance is that the DTI identified a cluster of nine ‘priority sectors’ for accelerated development. These nine sectors were selected on the basis of their potential contribution to the economy in terms of growth, equity and employment creation. It is significant that cultural industries was identified as a priority economic sector alongside, *inter alia*, agro-processing, business process outsourcing and information technology enabled services; chemical and allied industries; clothing, textiles, leather and footwear; information and communication technologies; electronics; tourism; and, transport industries (automotive, aerospace, marine and rail).

In December 2005 government issued a significant discussion document on developing a national shared growth initiative, titled the *Accelerated and Shared Growth-South Africa* (ASGISA) (Department of Trade and Industry, 2005). This initiative seeks to boost national growth rate for the period 2004-2014 to at least six per cent as well as to enhance “the environment and opportunities for more labour-absorbing economic activities” (Mlambo-Ngcuka, 2006). Among the several dimensions of this initiative, which designed to achieve balanced and sustainable growth for the period 2004-2014, is the identification, once again, of priority sectors. These are viewed as those sectors in which the country “has a range of comparative economic advantages which, if fully exploited, would lend themselves to higher rates of economic growth” (Department of Trade and Industry, 2005b). One of the nine sectors, seen as “medium-term priority” is that of creative industries (Mlambo-Ngcuka, 2006). Within ‘creative industries’ existing policy thinking currently is directed towards two foci: (1) supporting greater linkages of the craft industry with tourism, and (2) supporting the film and television production industry (Department of Trade and Industry, 2005).

By end-2005, however, only limited progress regarding actual policy initiatives for direct support of cultural industries (or the creative sector) could be observed. Of striking concern was the minimal progress made for direct national government support interventions for business development among cultural industry entrepreneurs through the national institutional framework for small business development (Newton, 2003).

Indeed, the most progress in terms of implementation was recorded not at national level but at certain provincial and local tiers of government in South Africa. For example, Western Cape Province and the City of Cape Town have taken certain pro-active initiatives in support of the cultural sector as a vehicle for local economic development, albeit the approach so far adopted has been criticised as so far “relatively unsophisticated and piecemeal” (Minty, 2005, p. 6). In addition, within Cape Town, South Africa’s leading centre for international tourism, few linkages seemingly have been made between the cultural and creative sector and new tourism product innovation.

4. Specific Research Context and Research Methodology

Over the last decade there emerged a number of new black-owned fashion producers in Gauteng which are based around the production of clothing for specialised markets in terms of contemporary urban African design. The most notable new brand names are Sun Goddess, Stoned Cherrie, and Loxion Kulca. In addition, an important element in the planning of the Johannesburg fashion district is support for the creativity of new black designers (Rogerson, 2004b). As part of the Johannesburg fashion industry, an important role is played by the Fashion Shack, which is located in inner-city Johannesburg, as an incubator hub for 40 young fashion designers.

This study sought to investigate the origins, growth and position within the clothing or (more correctly) fashion value chain of this new group of black-owned enterprises as a critical aspect of both wider black economic empowerment in the South African economy and the revival of the local clothing industry in Gauteng province. The research is organised into three components of work:

1. Enterprise Case Studies
2. Survey of Young Emergent Designers
3. Key Stakeholder and Context Research.

Each will be discussed in turn.

4.1 Enterprise Case Studies

Methodologically, the approach of the enterprise case studies is best described as “firm-centred” (Tokatli and Kizilgun, 2004). At the core of the study is the collection of a series of individual enterprise case histories² of the growth and operations of the new African brands.

- Sun Goddess,
- Stoned Cherrie, and
- Loxion Kulca

These case studies were undertaken through detailed structured interviews³ conducted with the entrepreneurs who were responsible for the founding and management of these enterprises. In addition to these enterprise interviews, the case studies on each of these ‘brands’ was supplemented by an extensive scan of the financial and fashion press, internet sources as well as a search of relevant local academic literature.

Each firm case history was structured to collect information on the following themes.

- The origins and growth of these new black-owned brands in the South African clothing industry.
- The nature and background of the entrepreneur
- Production sourcing networks
- Retailing channels
- Access to and use of support for business development by local and national government.
- The role of training.

² In the initial proposal, it was suggested that a case study would be included of the Craig Native brand. It was discovered that this brand was based not in Gauteng but in Durban. Another potential case study was Black Coffee but this fashion brand is owned by a white South African entrepreneur.

³ The original survey instruments in terms of the semi-structured interviews and questionnaire used for young designers are not included in this report but can be made available on request from the author at RogersonC@geoarc.wits.ac.za

- The linkages of these emerging businesses to wider Black Economic Empowerment in South Africa.

4.2. Young Designer Survey

The research on young fashion designers in Johannesburg used two research tools:

- A survey instrument which was completed with during October- December 2005 with 20 young designers in the city, the majority of whom are operating from the Fashion Shack in the inner-city fashion district
- A focussed group interview which emerged at a workshop on fashion design convened in Johannesburg during March 2006. All of this focus group (of 12 designers) are engaged in design activities outside of the Johannesburg Fashion District.

4.3 Key Stakeholder and Context Research

This component of the research involved the undertaking of a number of focussed interviews with key stakeholder regarding fashion and creative industries in Johannesburg. In addition, useful background documentary material was sourced.

The key stakeholder interviews were with:

- Dion Chang, Programme Director of SA Fashion Week
- Clive Rundle, Established Fashion Designer now based in inner-city Johannesburg
- Graeme Gotz, Economic Development Unit, City of Johannesburg
- Chantal Collet, Executive Director of the Fashion Design District Institute, Johannesburg
- Kevin Kane, Director BCG BEES, implementing agency in the Johannesburg Fashion District

- Faith Malatse, Project Manager, BCG-BEES.
- Rosemary Hopkins, Market Specialist, BCG-BEES
- Athol Margolis, Clothing Industry Bargaining Council

In addition to these interviews, other primary source material was collected from a range of different sources:

- Reports on the planning of the Fashion District from the Johannesburg Development Agency
- Reports on the make-up of the fashion district from www.commark.org.za
- The financial press
- The property press, especially www.eprop.co.za

5. Research Findings

This section describes and analyses the research findings in terms of four uneven sections of material:

- Policy Initiatives and the Environment Concerning Creative Industries in Johannesburg
- Policy Initiatives concerning Fashion and the Fashion District in Johannesburg
- The Emergence of African Brands through the Three Case Studies
- The Struggle Below: Emergent Fashion Designers

5.1. Creative Industries in Johannesburg – The Policy Environment

This section reviews material collected on creative industries in Johannesburg and in particular draws from the interviews conducted with Gotz and from documentary sources collected from the Economic Development Unit of the City of Johannesburg.

It was disclosed that the Economic Development Unit of the City of Johannesburg has recognised officially the role and potential of creative industries for contributing towards the goals of *Joburg 2030*, the city's blueprint for economic development over the next three decades (Gotz, 2005). Indeed, it is significant that the terminology of 'creative industries' is now used widely in planning documents issued by the city and its associated development agencies (see eg. City of Johannesburg, 2005a; Johannesburg Development Agency, 2005).

The recognition of creative industries is the latest chapter in the implementation of *Joburg 2030*, one important element of which includes support for targeted strategic sectors of the urban economy (Rogerson, 2005). During 2005, alongside new support programmes for business process outsourcing call centres, ICT, freight and logistics, and sport, it was announced that the Economic Development Unit of Johannesburg would support actively also the sector of 'creative industries'. A Sector Development Programme would be prepared for creative industries and focused on sector clustering and support. The Sector Development Programme is a vital component of *Joburg 2030* and is aimed at the removal of constraints and inefficiencies and the harnessing of opportunities in the targeted sectors as well as provision of relevant information to sector participants. The overall goal of the Programme is to enhance the competitiveness of the sectors and attracting and retaining investment in these sectors, thereby growing the city's economy as a whole (Rogerson, 2005).

The background to this announcement of support was the undertaking during 2003 of a series of scoping studies which linked to the key potential sectors for future development that had been identified in the *Joburg 2030* analysis. Nine sectors were looked at in detail, viz.

- Financial and business services;
- Information and Communications Technology;
- Retail and wholesale trade;
- Professional equipment manufacture;

- Other Equipment manufacture;
- Food and Beverages;
- Biotechnology;
- Automotive Parts; and
- Creative Industries

The Creative Industries Sector scoping study for Johannesburg built upon the foundations of the national cultural industry study of the Cultural Strategy Group (Newton, 2003). Essentially, the definitions used by the Cultural Strategy Group (1998a, 1998b) were applied to re-name the sector in Johannesburg as ‘creative industries’. The focus of the scoping investigation was thus primarily upon the segments of TV and film – in which (along with Cape Town) Johannesburg is the major national centre – music, performing arts, visual arts, crafts, and design. Critically, the research highlighted that the “Johannesburg creative industries sector dominates the national profile” (Newton, 2003, p. 42) and that the sub-sectors that dominate the local landscape are “craft, performing arts, visual arts, music and film” (Newton, 2003, p. 47).

In common with the emerging national picture of cultural industries, it was demonstrated that the sector of creative industries in Johannesburg is characterised by a high level of small and micro-enterprises, “the sole proprietors of which are predominantly the producers of creative products or content” (Newton, 2003, p. 33). In the majority of cases, particularly in micro-enterprise, the proprietor fulfils a set of multi-tasking roles as producer, agent, marketer and retailer. The products of the Johannesburg creative industries economy are overwhelmingly targeted at local markets. Indeed, the majority of products and services were consumed within the creative sector itself. None the less, mirroring the strategic position of creative industries in the value chains of other sectors, it was recorded that “the major private sector markets for creative industry products are the tourism, services and retail sectors” (Newton, 2003, p. 51).

The creative industries sector was found to exhibit signs of growth in terms of new business start-ups and by a profile of enterprises that was dominated by business start-ups

occurring after South Africa's 1994 democratic transition (Newton, 2003, p. 44). A significant finding across creative industries as a whole was that their estimated annual turnover figure of R50 000 indicated that the sector contains a large element of what would be described as 'survivalist' enterprises. Moreover, the survey of creative industries in Johannesburg disclosed that fifty-one per cent of enterprises reported they worked across between two to five of the different spectrum of activities that comprise the 'sector' of creative industries. In common with the earlier work of Dirsuweit (1999), it was shown that creative industries exhibited a locational tendency towards geographical clustering in parts of the city. Finally, whilst white-ownership was strong in the 'commanding heights' of the sector – in terms of the largest and dominant enterprises – it was observed that in Johannesburg, black economic empowerment was advancing in creative industries, unlike the laggard situation as recently reported in Cape Town (Minty, 2005).

The scoping study made a series of recommendations to Council for development of the sector. The most significant recommendations were as follows:

- Branding an image for Johannesburg's creative industries so that additional demand is generated;
- Addressing the chronic skills shortages in the sector;
- Enhancing networks and alliances such that the capacity of the cluster is strengthened to rapidly respond to new demands;
- Developing a strong business development infrastructure in terms of providing a business-friendly foundation of physical space, telecommunications, policy support and funding mechanisms; and,
- Dealing with the high levels of crime and urban decay in the inner city, which act as deterrents to tourists and the audiences of creative industries.

The City of Johannesburg's creative industries consolidated sector support initiative was announced by the Economic Development Unit in 2005 (City of Johannesburg, 2005a). The central goal is described as "to support both cultural workers with talent but limited

institutional support, as well as emerging companies with an entertainment industry focus” (City of Johannesburg, 2005a). There are four elements that comprise the support initiative.

- First, is the establishment of an innovative project styled the Johannesburg Art Bank, which draws upon parallel models already successfully operating in Canada and Australia (City of Johannesburg, 2005b). The objective of this project is to furnish support and supplement the income of Johannesburg-based contemporary artists by creating a market for their work over a five-year period (City of Johannesburg, 2005b). The bank functions by purchasing visual art works from local artists and then leases these to companies “who can refresh their office displays every two years at a fraction of the full cost of buying new art” (City of Johannesburg, 2005a).
- Second, the city has launched a Creative Industries Seed Fund which will “provide support to promising creative industries that could benefit both from the provision of business skills and up-front financial assistance to take a viable creative industry business-plan into implementation”. This project operates as a competition amongst learners who recently have completed “learnerships” in craft operations management, music business management or cultural entrepreneurship.⁴
- Third, the Economic Development Unit has initiated support for a facility which is targeted “to incubate start-up filmmakers” (City of Johannesburg, 2005a). More specifically, the Film and Video Incubator is aimed at support of new entrepreneurs in the film industry. The project is anchored upon a “dedicated facility where start-up filmmakers are provided with office space, office infrastructure and specialised equipment at subsidised rentals for approximately 18-24 months” (City of Johannesburg, 2005a).
- Finally, the City is funding a Johannesburg National Arts Festival Fringe Project as a basis for defining appropriate support for a performing arts incubator. This

⁴ A “learnership” is a specific type of employment contract provided for in the South African Skills Development Act of 1998.

initiative supports selected performing arts companies that have already put on productions at the annual national arts festival (held at Grahamstown) to perform these shows in Johannesburg, thus helping them gain national exposure as well as deepening local demand for quality productions (City of Johannesburg, 2005a).

Although the Sector Development Programme for creative industries represents the first co-ordinated explicit support from the city for creative industries, it must be recognised that other significant support interventions have been introduced outside of the Programme. Three developments are of especial note.

- First, is support for the Art City project which involved a joint initiative by the Council with a cellphone company to develop art murals on major inner city buildings.’ During mid-2002 the inner city of Johannesburg began to be transformed into a large art gallery with nearly 70 large murals displayed on the side of a range of buildings (Davie, 2002a). The project aimed to showcase the inner city “as the hub and cultural centre of Africa’s world class city” and to further enhance the role of tourism in the city (Davie, 2002b). The beginning of the display of art works coincided with the World Summit for Sustainable Development and ran until the Cricket World Cup held in March 2003.
- Second, the Newtown Cultural Precinct is a tourism-related project that was a joint initiative between the city and the Provincial Government and geared to promote a cluster of creative industries and more especially cultural industries that might enhance the area’s tourism potential (Dirsuweit, 1999). The planned cultural district represents a cluster of creative activities, entertainment and related industries for the promotion of tourism. Through the promotion of cultural tourism and the making of a cultural district, this historic area of Johannesburg, which contains several museums, theatres and heritage sites, is set to be transformed into “the creative capital of South Africa” (Blue IQ, 2002). In 2005 the provincial government’s involvement for the Newtown project was terminated with responsibility passed to the Johannesburg Development Agency (JDA). The JDA views the re-development of Newtown as a major regeneration initiative and

seeks to galvanise “major investment, particularly in the creative industries, culture and tourism” (Johannesburg Development Agency, 2005, p. 17).

- Finally, assistance has been provided by Council, through the activities of the Johannesburg Development Agency, for the development in the inner city of a ‘fashion district’ (Johannesburg Development Agency, 2004). This support was for establishing a hub for fashion design as part of re-invigorating the city’s clothing economy not on the basis of mass produced goods but of individual fashion items using an African design (Cachalia *et al*, 2004; Rogerson, 2004b). Central to the vision has been the notion of promoting the ‘Urban Edge of African Fashion’, capturing the spirit and vision of a fashion-oriented, trendsetting and outward looking district (Johannesburg Development Agency, 2004, p. 5). In terms of creative industries, this project, examined in further detail below, is highly significant for it goes beyond the group of activities that are the targets of support under the Creative Industries Sector Support Programme.

5.2 Policy Initiatives concerning Fashion and the Fashion District in Johannesburg

This section provides a review of the development of the Johannesburg fashion district, and of current and future developments. It draws upon both documentary material sourced from the Johannesburg Development Agency, interviews conducted with the Head of Fashion Design District Institute (Chantal Collet) as well as a number of members of BEES-BCG which is an implementing agency on behalf of the Johannesburg Development Agency for the upgrading of the Fashion District.

5.2.1 Background to District Development

Over the past decade, important geographical shifts have been observed in the locational patterns of economic enterprises in Johannesburg. The inner city of Johannesburg has experienced economic decline and physical decay as a consequence of the flight of many established formal sector retailing, manufacturing and headquarter offices to decentralised

locations (Rogerson and Rogerson, 1997). The decline of Johannesburg inner city (Fig. 1) has been viewed with growing alarm by the City Council which has sought to introduce a number of programmes for the economic regeneration and physical uplifting of the inner city.

The re-development spaces offered in Johannesburg inner-city by the exodus to decentralised areas of many white-owned manufacturing and retail enterprises created, however, new opportunities and an attractive environment for business development by newly arrived African-owned enterprises (Rogerson, 2002). Indeed, a process of the de-racialisation of business activity in South Africa's inner cities has been taking place through the relocation and growth of African-owned enterprises (Rogerson and Rogerson, 1997). Especially since 1993, a marked upturn has been recorded in the number of African owned enterprises operating within the inner-city of Johannesburg, both in terms of retailing and especially of production-related activities (Rogerson, 2002). The initial trigger for an influx of these entrepreneurs into Johannesburg inner city was violence in the township areas. Since 1994, however, this has been replaced by the pull of the economic advantages of inner city locations for the nurturing of infant small enterprises, not least in the restructured clothing economy of Johannesburg (Rogerson and Rogerson, 1997).

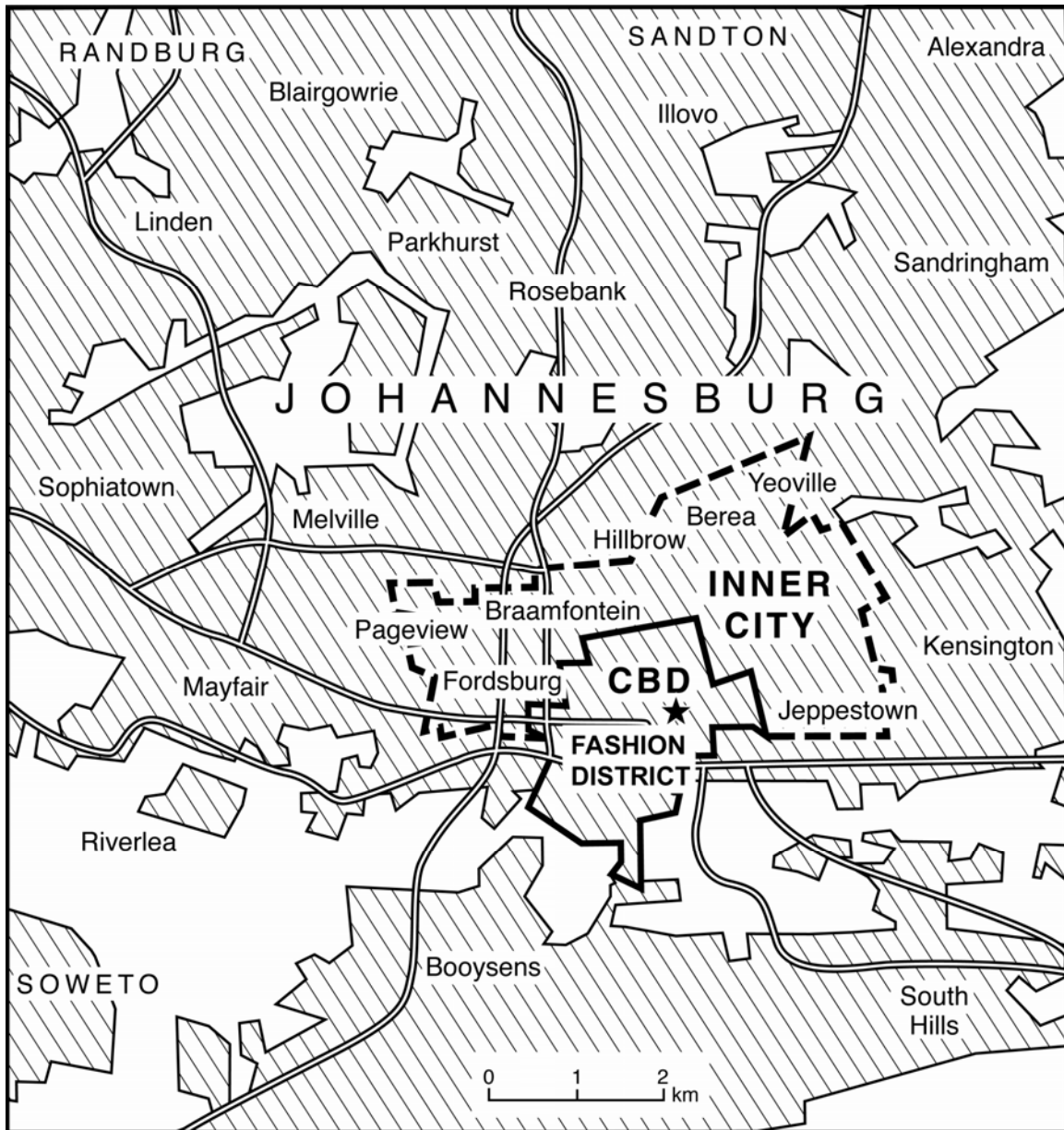


Figure 1: Johannesburg Inner City and the Location of the Fashion District

During the 1960s and 1970s the clothing industry of Johannesburg was the largest focus of national clothing production. Historically, the local industry has always been focussed upon the inner city area of Johannesburg and its surrounds. A spiral of decline began in the 1970s linked to apartheid spatial engineering and the higher labour costs of production in Johannesburg as compared to other regions of South Africa. Other factors that underpinned this downturn in local clothing were (1) low productivity, (2) a concentration of Johannesburg producers on the lower-income end of the clothing market which is particularly sensitive to competition from imports, (3) a reluctance of clothing enterprises to undertake dynamic adjustment strategies that might contribute towards enhanced competitiveness and (4) elements of a commercial flight of white capital from an inner-city environment that was experiencing rapid and radical changes in its business complexion (Kesper, 1999).

By 1980 within the inner city of Johannesburg there were an estimated 232 formal factories with nearly 15,000 employees; a decade later the factory establishments were down to 170 in total with 13,500 workers; by 1999 the numbers of factories was further reduced to 111 offering only 9,000 employment opportunities. By 1994 the Johannesburg clothing cluster was only the third most significant area of clothing production in South Africa having been overtaken by Durban and the Western Cape (Rogerson, 2004a). The remaining formal clothing production in inner-city Johannesburg was taking place in small factories owned by either white or Asian entrepreneurs. Alongside this numerically small group of formal clothing producers, however, there occurred a burst of large numbers of emerging SMMEs or informal clothing manufacturers. In 2006 the Clothing Bargaining Council of South Africa estimated that clothing employment in Johannesburg had reached a level of approximately 6,000 workers (Margolis, 2006).

Within the category of 'emerging clothing SMME' are contained two distinct and very different kinds of entrepreneur. The first group of new clothing producers in Johannesburg inner-city are immigrant entrepreneurs, establishing their businesses on the basis of capital which has been brought in from outside South Africa or from savings earned whilst working in South Africa. Immigrants from Francophone West Africa (especially Senegal, Mali and

Ivory Coast) are the best represented; other sources of immigrant clothing entrepreneurs include Botswana, Kenya, Somali Republic, Democratic Republic of Congo, Malawi and Zimbabwe (Peberdy and Rogerson, 2003). A second – and the largest group of new clothing entrepreneurs, are represented by clothing enterprises which are run by black South Africans. Many of these entrepreneurs started their operations in the home either in a township area or the inner-city flatlands of Johannesburg. Other new South African entrepreneurs emerged out of the large number of retrenchments taking place in the formal clothing economy during the 1990s.

Restructuring of the national clothing industry has been rapid since 1994 with the abandonment of South Africa's former programmes of heavy industrial protectionism and import substitution towards a new emphasis upon trade liberalisation and a more outward oriented industrial strategy. In an environment of enhanced international competition, the South African clothing industry experienced considerable realignment, more especially as those producers involved in domestic value chains experienced considerable competition from imported clothing (Rogerson, 2004a). As part of this wider restructuring taking place in national clothing production in South Africa, there is occurring a considerable revival in the Johannesburg clothing industry, which has been assisted by the emergence and planning for the local garment or fashion district situated in the inner-city (Fig. 2).

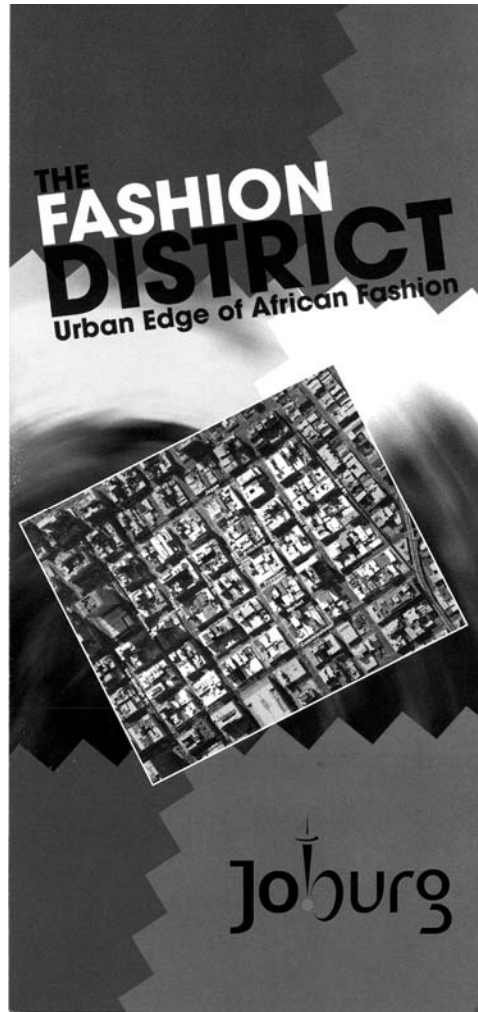


Figure 2: Official Marketing for the Johannesburg Fashion District

5.2.2. Local Planning for Johannesburg's Inner-City Fashion District⁵

As part of the wider initiatives undertaken for the planned revitalisation of the inner-city of Johannesburg, several initiatives have been taken since 1998 to support the cluster of formal and informal clothing producers and suppliers which were in operation there. Formal sanction for the planning of a garment district was given by the Johannesburg Metropolitan

⁵ This section extracts from and substantially updates material published in Cachalia *et al* 2004 and Rogerson, 2004b.

Council after the completion of a detailed investigation on the overall state of the changing inner-city economy. In 1999 a working group was constituted to formalise a process of planning for a garment district to be constituted around this spatial cluster of enterprises in the inner-city. Key players in this initiative were the Inner City Management Team of the Johannesburg Metropolitan Council, the BEES Consulting Group (a NGO consulting firm), various specialists and staff from the Ford Foundation, which provided seed funding. This working group prepared an Inner-City Garment Industry Development Project Outline document which proposed the formal development of a niche focused Garment Industry District. The project proposal was presented to the Greater Johannesburg Metropolitan Council in April 2000.

With the backing of the metropolitan council and additional support funding through the Ford Foundation a further phase of preparatory action research work was pursued by various task teams during 1999-2001 as a basis for strategic intervention. An enterprise support task team focused upon identifying the key service needs and gaps of entrepreneurs working in the inner city garment industry. The team defined support areas to encompass issues of skills upgrading, machinery supply and repairs, displays, marketing and market access, finance, supply of materials, business management and support. The most important finding of this group was of the limited support services that were available to micro-enterprises located in Johannesburg inner-city. More specifically, the deficiencies of existing support services were that few training institutions either in the formal or informal sector were available to these enterprises; no business advice or quality control centres existed to provide support; few businesses provided machinery repair services and almost no businesses in the inner city offered printing, advertising, marketing, tendering or network services. Set against this unpromising picture of limited support services were the many needs of the community of small clothing enterprises. The research disclosed that these entrepreneurs were unable to cost their goods correctly, market their garments or businesses, and keep adequate records. Amongst a host of operational problems and support needs, the following were viewed as most significant, *inter alia*, the need for advanced training (both technical and business) with an emphasis upon specialised skills such as embroidery; the need for improved premises to address the lack of storage spaces, often inadequate office spaces, poor lighting, the absence

of space for the display or exhibition of manufactured goods, and the lack of child care facilities; weak business skills; no known agencies offering information and advice; and lack of any financial institutions that were willing to offer finance.

Other task team conducted research on issues around social capital and associational activities. The social capital group sought to understand the ‘social capital’ in the form of existing business linkages between micro-enterprises in Johannesburg inner-city. The major conclusions of this investigation were five-fold. First, that certain linkages did exist between the clothing producers with many sharing common work spaces, shared machinery and information networks. Second, there was limited social capital, however, in the relationships between clothing producers and their suppliers. Third, that relatively good relationships existed between clothing producers and the landlords from whom they rented space on a monthly basis in the inner city. Four, that customer relationships were good from the perspective of the clothing producers. Finally, that there was only limited relationships and interactions between immigrant and South African owned clothing enterprises.

The associational activities group was centred upon an understanding of the role and functions of existing organisations and of formal associations. The research disclosed that ninety-five percent of clothing producers did not belong to any associations and that therefore there was “a great need” for the establishment of a manufacturers association. The report further recommended that whatever form of business association that was evolved, that it should be inclusive of immigrant entrepreneurs as well as of the larger group of South African owned clothing enterprises. Finally, additional research on enterprise support confirmed that training was a critical gap in existing support services. In particular the research highlighted that the informal training schools that existed in the inner-city were unregistered, not accredited and many were ‘fly-by-night’ operations which operated with untrained instructors (Rogerson, 2004b).

Against the backdrop of the urgent need to upgrade business and technical skills, BEES started discussions with the national and provincial Departments of Labour to secure finance support for upgrading the existing inadequate training situation for the inner-city clothing

producers. Under the Skills Development Programme set up by the national Department of Labour (DOL) to support the unemployed it was proposed that a DOL training programme be established to equip entrepreneurs through 'learnerships' with advanced sewing skills and improve the quality of their garments. At the same time as these discussions were proceeding, SEWAFRICA a private sector white-owned business with many years of experience in the Johannesburg clothing industry saw a niche in the market. In particular, the SEWAFRICA entrepreneur proposed the establishment of a training centre for clothing producers as an extension to his existing sewing accessory business which was located in the heart of the inner-city. Discussions were now set in motion for a three-way partnership to be backed by the Department of Labour for a strategic training initiative to support the strengthening of the inner-city fashion district of Johannesburg. The role of the private sector partner was to provide the equipment and premises for the training centre which was located in the fashion district. The NGO, BEES' role was to recruit trainees and manage the programme. The Clothing and Technology Department of Technikon Witwatersrand (now University of Johannesburg) was identified as the most suitable partner to provide materials and trainers. Finally, after numerous meetings with the Department of Labour, permission was granted for a pilot training programme to proceed, albeit with the provision that only South African citizens were to be trained.

Once the application was approved the partners agreed that technical training courses would be offered to individuals who could already sew and were operating a micro-enterprise in the inner-city. Recruitment of trainees began with visitations to buildings known to contain a concentration of clothing micro-enterprises with the first groups starting training in August 2001. After initial problems in recruitment and of the shift to part-time courses (which produced much better attendance levels), word-of-mouth information provided at the sewing centre and referrals by former trainees resulted in all the sewing training courses being filled, some even beyond capacity. The training classes disclosed that whilst all trainees were able to sew, their knowledge of sewing was limited. Equally important was that trainees lacked basic business skills with costing and pricing a continuous set of difficulties.

In order to ensure that training was in the best interest of the trainee, part of the course requirement was a six-month post-training regime under which each trainee was expected to bring in to the trainers a garment produced by them that month and demonstrating the skills acquired during the training. In general, the trainers have seen a marked improvement in the quality and finish of garments. Follow-up support was provided also to trainees in terms of business training to address the particular inadequacies of marketing, record keeping, costing and business planning. Once again, the assessments on this training have been favourable with many entrepreneurs after completion of the course using such alternative marketing tools as pamphlets, business cards and signage outside premises

Currently, the goal of the planners of the fashion district is to re-position the fashion industry in Johannesburg a decade after the traditional garment industry had collapsed. The pool of skilled fashion workers, displaced during the period of decline, is merging now with the new skills from immigrant entrepreneurs from sub-Saharan Africa as well as South African entrepreneurs. The resultant mix is seen as developing as an organic cluster which is shifting the direction of the industry. Historically, the clothing industry in Johannesburg competed in narrow buyer-driven clothing value chains that provided the supply lines to the major South African retail chains. As a result of trade liberalisation and South Africa's re-integration into global markets these retail chains are now no longer sourcing their requirements locally. It is thus recognised that the future prosperity of the district lies in value-added design and manufacturing around niche products and markets which are viewed as having a real long term potential to penetrate specialist local, regional and international markets (Rogerson, 2004b).

The focus is thus no longer upon 'garment production' per se but upon instead upon promoting cutting edge fashion. The vision is to make Johannesburg the urban edge of African fashion'. At the heart of the fashion district are the clusters of almost 1000 clothing micro-enterprises which constitute the anchor for the city's garment or fashion district (Cachalia *et al*, 2004). There are a series of projects which are designed to enhance the overall performance of this cluster of almost 1000 clothing micro-enterprises. Among

these are, *inter alia*, initiatives to improve the skills base of entrepreneurs, to link these emergent entrepreneurs to more established businesses outside of the cluster, to promote joint action, cooperation and ‘collective efficiency’ among South African clothing entrepreneurs and to seek to promote synergistic networks of opportunity which also begin to tap the strengths of immigrant entrepreneurs. SEWAFRICA House has been launched as a focal point or nucleus for the creation and promotion of African designers and hosts rooftop fashion shows of emerging new designers. The SEWAFRICA is a flagship and incubator that is designed to rejuvenate Johannesburg fashion in partnership with the Economic Development Unit of the City of Johannesburg and the Johannesburg Development Agency. The building incorporates “The Fashion Shack” which showcases the products of creative young designers who work in the upper floors of the building. It is planned that designers at SEWAFRICA will outsource their work to cut-make and trim seamstresses and dressmakers in the fashion district that will provide critical linkages for local economic development.

Planning for the fashion district is taking shape through ‘branding’ and a creative upgrade that links the streets of the fashion district together through a colourful mosaic that runs across the pavements in a zigzag of easily recognisable sewing stick patterns (Rogerson, 2004b). Moreover, ‘fashion’ is understood and planned as a broad cultural-industrial concept (Scott, 2004). Although clothing design and sales represent the core of the fashion district and define its predominant use and character, a range of associated aspects of fashion are encouraged to add to a wider mix of compatible uses and amenities in order to build “an exciting, vibey and productive area”. Among the other elements of the “urban Edge of African Fashion’ in Johannesburg inner city are DJ bars, restaurants, and furniture, home furnishing and décor outlets (Figure 3) Local intervention is important in terms of establishing a dedicated institution – the Fashion Design District Institute - that will take forward the long-term role of the support and development of the district. The institutional development of the Fashion Design District Institute is a key step in the council’s commitment to upgrade the area and encourage a patronage of more high-income shoppers in the district.

According to the Director of the Fashion Design District Institute, Chantal Collet (2006), the long-term vision is for the fashion district to become the “fashion capital for Africa” and to build upon Johannesburg’s primary position as the major shopping locus for Africa. The planning is to promote diversity of design and to incorporate immigrant as well as South African design. The following descriptors capture the essence of planning for the fashion district:

- “uniquely Africa”
- “Africa’s design centre”
- “cutting edge design by South African designers”
- “The Home of Innovative African fashion”
- “A place that offers products that cannot be bought elsewhere”
- “It is to be a lifestyle district”
- “Incorporate not just clothing but music, eating, jewellery and craft”
- “Be different – Only in Johannesburg”


In support of the upgrading of the area, the Johannesburg Development Agency has committed funds of R20 million for the development of “Fashion Square”, which is to be a focal point of the upgraded fashion district (Collet, 2006). Considerable activity surrounds urban management in the area in terms of cleaning the area, addressing petty crime, and dealing with derelict and deteriorated building stock. As Dawson and Davie (2004) point out, a key element in the physical renewal of the district relates to “the identification of “bad” buildings that have diminished in value because of overcrowding by squatters”. The planned development of Fashion Square is set to incorporate retail space, including for young South African designers, as well as the attraction into the inner city of retail developments by African brands such as Loxion Kulca, Sun Goddess and Stoned Cherrie (Collet, 2006). Fashion Square represents an example of public investment with a long-term goal of leveraging private sector financing.

Bongiwe Walaza, Fashion Designer at SEWAFRICA

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Down in Pritchard Street, Joburg's fledgling Fashion District is buzzing. Dozens of small and micro-enterprises are busy designing and creating countless articles from homeware to clothing to fashion accessories. SEWAFRICA's Design Incubator is fostering local talent for global markets and BCG BEES is providing small business support. Together with the Johannesburg Development Agency, we are investing in the future of these companies. This is what Joburg 2030 is all about - creating a world class business environment for world class companies. The city is booming. Come and join us.

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Figure 3: Re-Fashioning Johannesburg

5.3 New Fashion Enterprises: Growth and Challenges

In terms of analysing issues surrounding the growth of new fashion enterprises in Johannesburg, two sets of material are discussed. The initial focus in this section is upon the different trajectories of development of three significant new fashion brands which were selected as enterprise case studies. All three of these more established fashion

enterprises base their operations in the northern commercial suburban areas of Johannesburg rather than in the inner-city fashion district. The subsequent discussion in Section 5.4 reviews the issues facing young designers and of emerging fashion enterprises operating in the inner-city fashion district.

The three case studies are of Sun Goddess, Stoned Cherrie and Loxion Kulca. All three are brands owned and built-up by black South Africans. All represent businesses that have been established since the 1994 democratic transition. Indeed, the expansion of these brands has been remarkable, for all these enterprises were initiated only in 1999-2000 period and thus have been in business for less than eight years. Of significance is that each enterprise exhibits a different design emphasis (Chang, 2005). Sun Goddess concentrates on the production of what can be described as ‘ethnic’ South African clothing and incorporates traditional African designs often celebrating Xhosa heritage and culture. By contrast, Stoned Cherrie focuses more upon contemporary urban African designs with clothing that profiles variously *shebeen* queens, Sophiatown, *Drum* magazine or Steve Biko, a prominent activist murdered in the anti-apartheid struggle. Finally, Loxion Kulca offers a case study in a brand and product lines that are identified with South African or more specifically township street culture. Overall, the Director of South Africa’s Fashion Week, Dion Chang (2005) asserts that the South African fashion industry is blossoming and progressively developing “an identity that sells”

The evolution of each of these three distinctive fashion brands is explored below. Each enterprise case history was structured in order to collect a range of information, including the following themes, *inter alia*, the origins and growth of these new black-owned brands in the South African clothing industry; the nature and background of the entrepreneur; production sourcing networks and retailing channels; business development; and business linkages. The presentation of each case study, which is based upon interviews with the business entrepreneurs as well as from material in the business and industry press, is undertaken in the form of a narrative concerning the development trajectory of each particular enterprise.

5.3.1. Sun Goddess

Sun Goddess presents a prime example of the growth of 'African' fashion brands of clothing in the post-1994 era of South Africa. Created and owned by Thando and Vanya Mangaliso, a husband and wife team, Sun Goddess started its activities in 2000. The business is essentially aimed at the design and retail of South African, ethnic clothing and, amongst other designs, is commonly known for its A-line skirts and 'boob-tube' tops. In its first five years of operation this new African brand has expanded to employ 60 people.

For the Mangalisos with a marketing background but no prior fashion base, the reasons for business start-up included aspirations for financial autonomy, a desire to make a positive contribution to the reconstruction of a South African identity and, an inner need to preserve African (and particularly Xhosa) culture and heritage. Vanya described several of the problems faced during business start-up, *viz.*, financial constraints, a level of ignorance in terms of locating suppliers and forming new contacts in the fashion industry, not being able to benefit from economies of scale and, most importantly, developing the product at hand and finding a place from which customers could access this product. Initially, the business operated from the Mangaliso home in Johannesburg's northern suburbs. The growing business was relocated to a design studio in Braamfontein close to the inner city, which allowed better access to fabric suppliers in Fordsburg and the inner city, as well as improved contacts with other young designers and the local fashion network as a whole. More recently, Sun Goddess relocated again to the decentralised shopping and commercial node of Rosebank, where the enterprise operates from a new retail store at The Zone.

From its Rosebank base, expansion has occurred to other parts of Johannesburg and beyond to other South African cities. By-end 2005 Sun Goddess had four retail outlets, including the store in Rosebank. The other stores are all located in upper-income shopping areas, at the Gateway shopping centre outside of Durban, the Waterfront in Cape Town, and Mandela Square in Sandton, Johannesburg. Sun Goddess has focused

its retailing strategy upon its own outlets and has eschewed supplier relationships with the large retail chains such as Woolworths or Edgars. For Vanya, to do so would mean the creating of “watered-down”, less expensive garments, which would move away from the desire to preserve ‘pure’ ethnic African cultural designs. Although targeted at the middle to upper income brackets, Sun Goddess products are aimed at consumers who identify with (and can afford) its designer label that radiates with ethnic flair. The market for the goods of Sun Goddess includes both foreign tourists and domestic customers, particularly affluent orthodox Muslim and Jewish women, who often favour the company’s long, traditional, A-line skirts.

Branding has been paramount to the success of the Sun Goddess. Vanya explains that such branding does not simply involve coming up with new and creative clothing designs but incorporates also the manner in which service is packaged and the way the staff in each of the stores present themselves. The design process within the business remains in-house. Sun Goddess makes a concerted effort to employ only black designers. The Mangalisos believe that they have a moral responsibility to uplift South Africa’s black population, who were disadvantaged particularly under apartheid. According to Vanya, Black Economic Empowerment, which is a South African government led initiative targeted to expand the involvement and strength of black participation in the South African economy, is “about making certain business choices and decisions”.

The designs adopted by Sun Goddess stem from original designs used by African peoples (particularly of the Xhosa culture) since the seventeenth century. Each design is thoroughly researched and may involve working with paintings and actual garments that have survived, so as to reconstruct the history of the design itself. It is argued that the adoption of such designs contributes to the process of creating a South African identity, by drawing on the colour and cultural vibrancy of local ethnic heritage. The aim of Sun Goddess is not to simply blend ethnic African and Western design, nor is it to create a new ‘South African’ design. Instead, it hopes to encourage all South Africans to celebrate ethnic African culture through its beautiful designs. Sun Goddess has exhibited their designer garments internationally in China, the United States, Nigeria, Madagascar,

India, Korea and Japan. It is significant that the popular ethnic designs of Sun Goddess have been imitated by Chinese clothing producers. Accordingly, Sun Goddess has made a conscious effort to design garments in a way that makes them difficult to reproduce or copy. Such efforts include the use of expensive imported fabrics (which can cost up to R1500 a metre) and the use of various forms of embellishment (such as beadwork, embroidery and other detailed handwork) on the garments. Currently, the greatest competition faced by Sun Goddess is from other new local, African designer brands (such as Stoned Cherrie).

Production of Sun Goddess clothing is undertaken in-house as well as outsourced to manufacturers based in Johannesburg. As eighty per cent of the fabrics used by Sun Goddess are imported, the business is exposed to a degree of vulnerability brought about by vagaries in the Rand exchange rate. Silk is imported from India, linen from Ireland and India, hemp from China and beaded fabric from Europe. Fabrics sourced locally include cotton and its various blends and K-sheeting (more commonly known as kaffir-sheeting). At present, nearly all production occurs outside of the fashion district. Occasionally, some CMT production processes are outsourced to BEES, the non-government development organisation that organises networks of women sewers in the fashion district.

In 2003, the enterprise began exporting on a regular basis to a clothing retail outlet called “World Lounge” in Japan. This Japanese retailer arranges each consignment and its shipment. Smaller-size garments are manufactured to Japanese specifications with the Sun Goddess label on them. Looking to the future, Sun Goddess hopes to expand further into international markets and to provide a more diversified product that would include designer swimwear for the more ‘conservative’ consumer.

5.3.2. Stoned Cherrie

The name Stoned Cherrie represents 1950s slang for a pretty girl. The enterprise’s founder and creative director is Nkensani Manganyi, who had an extensive fashion

background and was locally well-known for her role as co-host of the M-Net television 'Face of Africa' modeling show. Stoned Cherrie is a luxury lifestyle brand for clothing, clothing accessories and home-ware. The business was created in 2000 and initially was inspired by its founder's vision to develop a new form of African expression that was both dynamic and sophisticated. Since its establishment in 2000, the Stoned Cherrie brand has experienced remarkable growth of its operations and brand (Cameron, 2004).

At business start-up Stoned Cherrie faced a number of difficulties such as financial constraints and competing with the bigger retailers. Nkensani argues that one of the key reasons why the business was received so well by the local fashion industry was the industry negotiating a new South African identity. Since 2004, Stoned Cherrie has become well-known for leading the development of an urban, African brand that is truly contemporary. Indeed, Stoned Cherrie's contemporary flair sets it apart from other ethnic African clothing brands, such as Sun Goddess. Stoned Cherrie is known for its boutique couture range, which is retailed from its Rosebank store (at The Zone) and studio (also located in Rosebank). In addition, Stoned Cherrie has produced a more 'basic' range that is retailed through selected Woolworths stores nationwide. Nkensani describes the designs supplied to Woolworths as the "basic essentials for building up a Stoned Cherrie wardrobe," and would include garments such as, a classic skirt, jeans, a denim jacket and a formal dress.

As Nkensani has taken the interpretation of traditional, African design to another level, Stoned Cherrie has moved beyond the use of the typical, A-line skirt. What has emerged is a range of designs which is inspired by urban township culture and a "cheeky definition of what it mean to be African". Stoned Cherrie blends images of boxing champions, beauty queens, and musicians from *Drum*, a magazine that was extremely popular in the 1950s, integrating them into contemporary fashion styles (Nuttall, 2004: 436) Various emblems and prints depict Steve Biko and *shebeen* queens have enabled a blend of traditional design, South African history and modern urban design, which is projected at "an expressly cosmopolitan target audience" (Nuttall, 2004: 436). For this

unique blend of design, Stoned Cherrie has been hailed as “a true South African brand” by the Programme Director of the South African Fashion Week, Dion Chang (2005).

In terms of business development, whilst Nkensani believes that black economic empowerment must be a central feature of the Stoned Cherrie business strategy, the core criteria for employment is level of skill rather than racial considerations. This approach is emphasised by Nkensani’s philosophy that ‘being African is not about being black’. Indeed, until recently, one of the major designers employed at Stoned Cherrie was a white woman (Cameron, 2004). All production of Stoned Cherrie clothing is outsourced to local manufacturers either in Johannesburg or Cape Town.

The domestic high income South African market is the core of Stoned Cherrie’s current business. Currently, Stoned Cherrie does not export its products. Nkensani has taken the strategic decision to first build the enterprise and brand with a solid foundation in the South African market. Future planning for Stoned Cherrie does include potential initiatives to market their goods, particularly in Japan and the USA. Overall, the main business goals of Stoned Cherrie, going forward, are to grow their market, both locally and internationally as well as to diversify into the home-ware market.

5.3.3 Loxion Kulca

The Loxion Kulca brand offers a case study of a radically different character to that of either Sun Goddess or Stoned Cherrie. What is distinctive about Loxion Kulca is that it is an enterprise that is centrally focused on brand construction and development rather a direct focus on design, production and distribution processes.

The Loxion Kulca label was established as recently as 1999 and presently is owned jointly by Sechaba Mogale and Wandi Nzimande, both of whom were born in 1976, the year of the Soweto uprising. Close school friends, at age 24 the two founders, with no formal education in fashion, were looking for ways to make money in the late 1990s. As representatives for a fashion business known as ‘Fashion Fever’ selling hats their

awareness developed of the importance of branding. The pair wore crocheted close-fitting skull caps and local people began asking them where these caps could be purchased. This provided the impetus for the two partners to encourage friends and family and others to produce the hand-knitted ‘beanies’ which were sold either out of plastic bags or car boot.

An important turning point in the growth of the enterprise was the taking-on of a white business partner, a former successful clothing manufacturer, who assisted the two black entrepreneurs to grow Loxion Kulca into a mass market brand. The brand collection diversified from the initial focus on hats into urban street-wear, mainly of denims, printed T-shirts, and sport shoes and later to include branded overalls and men’s suits (Nuttall, 2004). The clothing produced under the Loxion Kulca label seeks to project “street feel” and initially involved clothing with a loose fit with pockets “in the right place’ for keys or cell phones. Marketing was a critical factor for the early success of Loxion Kulca as the clothing label was surrounded by *kwaito* and hip-hop music and street culture (art and graffiti) that allowed the brand to capture and retain ‘street cred’ (Rubin, 2003).

The name Loxion Kulca was created out of the belief of its designers that urban locations or townships (Loxion) were similar in their cultural vibe (Kulca). The label was identified as a tool for the expression of township street culture at a time when many retailers were still not interested in local South African brands. Argues Nuttall (2004, p. 437) “Like *kwaito* music, Loxion Kulca claims the streets of South African townships as its cultural womb but occupies the centre of its city with its new forms”. Overall, Loxion Kulca is viewed as a “‘pride-driven line’, a ‘brand born of the Yfm era’, one that remixes African American styles to its own purposes and in ways that speak to its own cultural precursors” (Nuttall, 2004, p. 433). For Nuttall (2004) the growth of the Loxion Kulca brand is inseparable from the emergence of a new city youth culture called Y (for youth) or *loxion culture*, which was centred initially upon Rosebank in Johannesburg and now stretches beyond this trendy and affluent commercial northern suburb. The Y culture was linked to YFM, South Africa’s largest regional radio station beamed from Johannesburg, which from 1996 broadcast popular local music to black youth.

The Loxion Kulca business currently is anchored largely on brand development and its popularity has facilitated the growth of various product lines, including men's wear, formal corporate wear and cell phone covers. Clothing remains, however, a central element in the business which stimulates the talents of local designers through the prospect of carrying the name of the local designer as well as that of Loxion Kulca. The product lines that fall under the Loxion Kulca brand are manufactured through the group of distributors who purchase a license to sell the Loxion Kulca brand. The core role of the two founding entrepreneurs is thus of influencing the style of Loxion Kulca products. At present, the brand is not sold through any Loxion Kulca retail outlet. Rather it is available through its distributors to a number of key retail outlets, including the Edgars chain, Cosmos in the Oriental Plaza and at Cyberzone at the Carlton Centre in inner-city Johannesburg. Currently, a total of 150 retail outlets across South Africa retail Loxion Kulca clothing (Davie, 2003). In addition, outlets exist in Botswana, Swaziland and Namibia as well as USA, Europe and Australia. In terms of production or distribution, at present, there are no linkages to the Johannesburg fashion district; indeed most production of Loxion Kulca products is outsourced by the brand's distributors to manufacturers located in China and Brazil. Nevertheless, in terms of retail distribution, the owners of Loxion Kulca are planning to open a direct outlet in the near future and have been targeted as one of the potential tenants for the Fashion Square development in the inner-city Johannesburg fashion district.

5.4. The Struggle Below: Emergent Young Fashion Designers

This section draws together the research collected from a survey conducted with young designers operating in the Johannesburg inner-city at the SewAfrica design incubator. The group of young designers potentially represent the next generation or new wave of fashion design enterprises in Johannesburg.

Emerging designers in Johannesburg operate their businesses in areas both inside and outside the boundaries of the Johannesburg fashion district. The designers situated in the cluster of fashion businesses in the fashion district benefit from agglomeration economies

and are 'advanced' in terms of their business development than those operating outside of the cluster (Malatse, 2006). Building upon the advantages of geographical clustering, initiatives were launched by SewAfrica in the inner city for the opening of a design incubator in the format of the 'studio hub'. The concept of the studio/designer hub was developed so as "to provide potential emerging designers with a facility that would give them an opportunity to start their own businesses in a sheltered well-equipped and supportive environment" (SewAfrica, 2005). Overall, the studios are considered as "a starting point from which designers can launch their career in the fashion industry" (SewAfrica, 2005).

The young designers can choose between sharing a studio with two machines in the studio or the designer can lease a studio independently. The double studio (with two machines) can be leased at a rate of R1200 per month or a single studio for R1000 per month. Each designer is allocated a fully partitioned study including a desk, chair, rail and sewing machine for the designers' exclusive use. The designers may equip this space as they wish. In addition, each designer has access to 'common' specialised equipment such as cutting tables, production tables, work tables, industrial bottle irons, fusing press, vacuum unit and over lockers, a 'chill out' zone, and a board room with furniture to meet with clients. Finally, each designer is permitted retail space on the ground floor of the building in the Fashion Shack. Only designers in the building can retail their designs at the Fashion Shack. Each designer is entitled to 10 outfits, albeit the owner of the fashion Shack is open to negotiation. There is no payment for rail space in the Fashion Shack. None the less, a twenty percent commission is payable for each garment sold in the Fashion Shack (SewAfrica, 2005).

The key findings from the 20 interviews conducted with the designers at the design incubator disclosed that whilst the incubator incorporates a mix of tenants of different races and gender, the largest number of young designers were black women, mostly under thirty-five years of age. The design businesses are also youthful as all twenty fashion design enterprises had been established in the last five years. The majority of designers have dedicated qualifications in fashion from a range of institutions. Prior to

entering clothing design, most of the designers were students, albeit there were recorded other cases of entry into clothing design from prior work in graphic design and two cases of previous work as a Telkom engineer and as a waiter.

The survey disclosed that these fashion businesses represent the major source for household income. At start-up, most businesses operated from home prior to moving into the design incubator. Typically, at start-up finance was a critical issue with most fashion designers using own their own sources of capital. Reasons for start-up included the desire for self-employment, the goal of becoming a fashion designer or of making clothes. As one interviewee stated “Fashion is my life, it’s what I do!”. The most common responses in terms of source of design inspiration were “everywhere” or “everything in life”. Overall, design inspirations vary and were described in the following terms:

**From my cultural/traditional roots and wanting to fuse this with the present and future.*

**From everything I experience as an individual.*

**Africa, People, Spirit, Energy, Individualism, Everything.*

**The Zulu and Swazi cultures, library books, movies and magazines..*

**From Craig Native when I do street wear, But mostly from the people of Melville and Yeoville.*

**My surroundings.*

Overall, the survey revealed that design and production of garments occurs mainly at the SewAfrica incubator with some outsourcing of larger orders into the inner-city. Production is a mix of individual orders and design of ‘off the peg’ garments for sale at the Fashion Shack retail outlet. Most retailing is focussed at the Fashion Shack plus ‘word of mouth’ retailing through orders. One interviewed (white) designer reported also sales to boutique shops in the city. The major linkages into the fashion district occur through fabric suppliers in the immediate vicinity. Outside of the fashion district, the major links are with other fabric suppliers at the Oriental Plaza. Business performance in the previous 12 month period, for most designers, had improved; a small number reported a worsening business profile. Improved business performance and more clients was attributed mostly to good design/product improvement. Constraints on business development included marketing, finance, lack of advertising, need for machinery and

growing problems of the copying of designs by Chinese entrepreneurs. Despite problems, most designers were committed to fashion as a career (“it is my passion”) and most aspired to set up and own their own retail outlet in future.

6 Conclusion

This report has examined the development of the emerging fashion industry and of emerging fashion enterprises in Johannesburg, South Africa. In conclusion, it is argued that ‘fashion’ represents an important and undeveloped research frontier in terms of the African clothing industry. In particular, for South African researchers, fashion is an increasingly important theme against the backdrop of the restructuring of the national clothing industry as a consequence of globalisation and international competition.

In Johannesburg economic development programming for the city increasingly is emphasising the importance of targeted sector support for key industries with the greatest potential for growth as well as labour absorption (City of Johannesburg, 2006). Among the priority list of targeted sectors in current local development plans for sustainable and shared growth is creative industries, including fashion. Planning for the ‘creative city’ involves several initiatives, including that of developing the fashion district as an anchor for Johannesburg to be Africa’s fashion capital. Nevertheless, it is evident that the strongest development of the Johannesburg fashion industry is taking place outside of the fashion district itself. As is shown by the enterprise studies, new brands such as Stoned Cherrie, Sun Goddess and Loxion Kulca are at the leading edge of the city’s fashion economy and of forging a new identity for ‘African brands’ of fashion in national and (increasingly also) in international markets.

Looking forward, in terms of consolidating the existing disparate cluster of fashion-related businesses in Johannesburg, greater linkages necessarily must be forged between the young designers of the inner-city fashion district and the creativity and energy of the more established fashion brands operating in the city’s northern suburbs. In addition, the project of establishing Johannesburg as fashion capital of Africa requires that the

economic contribution of the fashion industry be more fully recognized by city authorities and that planning for fashion be explicitly integrated into and synergized with that of other creative industries. Finally, the fashion industry in Johannesburg, like that in other parts of the world, must confront the difficult challenge of protecting the creativity of its designers.

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