



Case study

Sierra Leone fabrics and fashion

Prospects and challenges for the sector

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Africa-Europe Mayors' Dialogue

Key messages

Sierra Leone has a rich history of fabric creation. The country is currently witnessing a rekindling of its domestic textile industry and a new crop of fashion designers are emerging; some have attracted international attention. This is a key opportunity for more investment and support to be directed at the local fashion and fabrics industry.

Businesses operate in a challenging environment, facing high production and finance costs, skills shortages and numerous supply chain challenges. A significant evolution of business and financing models is required to move beyond bespoke tailoring and scale up more standardised production.

There is a critical role for collective action to help develop the industry's competitiveness, achieve economies of scale, and to build and showcase the country's fashion brand. The emergence of a new business membership association provides an opportunity to galvanise collective action.

There are also opportunities for innovation around the domestic production of organic cotton and organic dyes, in line with global industry trends, and to improve productivity with enhanced skills and technology. The sector has high potential for inclusive job creation in the field of creative design and across the entire apparel value chain.

For opportunities to be seized, supportive stakeholders are required. Freetown City Council, under the auspices of its fashion partnership with Milan, can offer significant support to broker commercial contacts in Europe and achieve greater exposure for the 'Made in Sierra Leone' brand. The support of additional stakeholders – from national government to universities and development partners – will also be required.

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About this publication

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Acronyms/Glossary

| | |
|-----------------|--|
| ACC | Anti-Corruption Commission |
| AFAWA | Affirmative Finance Action for Women in Africa |
| AfCFTA | African Continental Free Trade Agreement |
| AfDB | African Development Bank |
| ARIA | Africa Resilience Investment Accelerator |
| CCCDI | Country Cloth Communities Development Initiative |
| DFI | development finance institution |
| DSTI | Director of Science, Technology and Innovation |
| FaTASL | Fashion and Textiles Association, Sierra Leone |
| FCC | Freetown City Council |
| GI | geographical indication |
| IP | intellectual property |
| MDB | multilateral development bank |
| MiSL | Made in Sierra Leone (brand) |
| NCTVA | National Council for Technical, Vocational and other Academic Awards |
| NGO | non-governmental organisation |
| PPD | public-private dialogue |
| R&D | research and development |
| SLAJ | Sierra Leone Association of Journalists |
| SLAJ-BEN | Sierra Leone Association of Journalists-Business and Economics Network |
| SLLCA | Sierra Leone Local Content Agency |
| SLCCIA | Sierra Leone Chamber of Commerce, Industry, and Agriculture |
| SLEDP | Sierra Leone Economic Diversification Program |
| TCE | traditional cultural expression |
| UNIMAK | University of Makeni |
| WACOMP | West Africa Competitiveness Program |
| We-Fi | Women Entrepreneurs Finance Initiative |
| WIPO | World Intellectual Property Organization |
| WSME | women-owned and led small and medium-sized enterprise |

1 Introduction

Sierra Leone has a rich history of fabric creation, though production has remained artisanal in nature. The country also has a number of newly emerging fashion designers oriented towards more modern tastes and contemporary designs. Several local businesses are successfully engaging with international buyers and markets. The domestic market is also experiencing a growing demand for clothing, home furnishings and accessories and multiple efforts are underway to rekindle the domestic textile industry. Opportunities for the sector are growing, though businesses operate in a generally challenging environment. More support is necessary to help the industry develop further.

Given its high potential for inclusive job creation and entrepreneurship, Freetown City Council (FCC) is interested in supporting the development of the fashion industry. It has developed a fashion partnership with the city of Milan, which is home to a world-renowned fashion industry and has been recently leading the transformation process of the industry toward environmental sustainability, ethical fashion and circular economy principles. A key aim of the partnership is to provide skills exchanges and broker fashion industry networks between the two cities, as well as to support the business development efforts and promote investment in Sierra Leone's fashion industry. This partnership also aims to strengthen and consolidate the 'Made in Sierra Leone' (MiSL) brand, to help position the country in global fashion markets.

This city-to-city fashion partnership has been developed under the auspices of the Africa-Europe Mayors' Dialogue platform (ODI, 2020). This platform is coordinated by ODI and brings together over 20 cities across Africa and Europe to work together on shared challenges related to sustainable urban development. It is co-led by the Mayors of Freetown and Milan, who have prioritised exchanges and learning between their two cities on a range of issues, including around their flagship fashion programme.

This case study has been produced as a core knowledge product for the fashion partnership. It aims to both inform industry stakeholders in Milan (and in Europe more generally) and to guide the direction of the fashion partnership being developed between the two cities. In addition, it provides critical information for FCC, development partners and other interested stakeholders in Sierra Leone, who can support the development of the industry.

Given the lack of published information and data on the fashion and textiles industry in Sierra Leone, this study depends heavily on primary research. A series of key informant interviews were conducted between January and April 2022. All the businesses consulted and referred to in the case study are listed in Appendix 1, with a basic description of each actor to provide further contextual information. All information presented comes directly from these interviews, unless otherwise sourced. The sector of interest covers fashion, fabrics (textiles), as well as home (soft)

furnishings and accessories, though it is referred to with various shortened terms (for example, ‘fabrics and fashion’, ‘apparel’) throughout; however, the intention is to present and discuss the industry in broad terms.

The case study starts with a consideration of the context, shaped by current trends in the global textiles and apparel market and where Sierra Leonean products (both fabrics and finished items) might fit in. Section 3 then focuses on capacity and constraints and Section 4 looks at the potential for collective action. The role that can be played by the relatively newly formed business membership association is particularly highlighted in Section 4, alongside a mapping of the allies that could contribute important support to the industry. The study ends with conclusions and discussion of the way forward for the sector.

2 The fabrics and fashion industry in Sierra Leone

History

Sierra Leone has a rich history of fabric creation and use, interwoven with culture, tradition, trade, and the movement of people around the West African subregion and beyond. In Sierra Leone, contemporary designers and entrepreneurs are reviving interest in the following three fabrics, which have a long history and tradition:

- **Gara tie-dye:** Using traditional tie and dye methods and a range of natural products, such as tree bark and kola nuts, that produce distinctive colours and designs.
- **Woven country cloth:** Using looms to weave cotton into heavy cloth used for clothing, bedding and in other household products.
- **Raffia:** Many of Sierra Leone's heritage artifacts, such as masks and skirts used by dancers in traditional rituals and rites of passage, are made of raffia (which is made from raffia palm leaves).

Production around these three fabrics has remained artisanal in nature and marginal in economic terms, especially as global trade has blossomed in recent decades and cheap, mass-manufactured, synthetic textiles and products have flooded the market. Nonetheless, Sierra Leone is seeing a renaissance and burgeoning interest in its fabrics and fashion, driven by a range of local and global forces and factors.

The appreciation for African culture, tradition, design and expression in various forms has risen over the last 40 years or so. A new crop of African artists and musicians gained global prominence when 'World Music' emerged as a category of appeal and interest in the 1980s. This helped fuel growing pride in a new generation of Africans both at home and abroad in the various old and new African diasporas. To some degree, this was the 'counterculture' to globalisation, with a growing concern about unequal, unjust and unsustainable trade relations; the apparent homogenisation of cultures and identities (revolving around mass consumption); and a search for identity and meaning rooted in diverse histories and traditions. Fair trade has helped to normalise consumer interest in the provenance of goods finding their way onto international markets. Today, anyone with access to a global social media platform can tell their own story and reach global audiences and shape consumer preferences.

In Sierra Leone specifically (but true elsewhere in Africa), a new crop of fashion designers has emerged to meet the growing demand for clothing and home accessories, informed by tradition, culture and custom, but oriented toward more modern uses, contexts and shifting tastes. These include Bivamiks, Hen Nyandei, Izelia, Madame Wokie, Pangea and Vivid Emporium (see Appendix 1 for business profiles). The huge potential of this industry across Africa is increasingly recognised (see Box 1).

Box 1 The African fashion industry

The expansion and high growth potential of Africa's fashion industry is increasingly being noted. Some countries, such as Mauritius, Madagascar and Lesotho, are focusing on the mass production of clothing in export processing zones. However, there is increasing recognition of African fashion designers and the scope to innovate with higher-value production, both for the growing middle-class population in domestic markets as well as to boost exports to regional and global markets. An important aspect is that Africa's fashion industry has high potential to stimulate inclusive growth, given its labour-intensive nature, the critical contributions of small and medium-sized enterprises (which make up the bulk of the sector), and the significant role played by women. In Ethiopia, for example, 80% of employment in the apparel sector is of women workers.

Currently, little policy attention is paid to the sector on the continent, particularly if compared to other creative industries such as film and music. Often, as in Sierra Leone, this is partly due to the lack of organisation and collective action by the industry players. However, it is increasingly recognised that governments can, and should, provide strategic support to the fashion industry. Investment in the sector opens the door for a comprehensive national strategy, combining support for smallholder farmers and local artisans, as well as for fashion designers, generating both skilled and unskilled jobs. It also offers high potential for scaling up local content and developing Africa's manufacturing base, as well as for creating new initiatives around recycling if circular economy approaches are adopted. These additional factors also make the sector very attractive for prioritisation by national and local governments.

The sector is also interesting in the context of regional trade. The African Continental Free Trade Agreement (AfCFTA), in operation since 2021, is expected to boost the creative industries across Africa via increasing intra-African trade. While the AfCFTA can provide a large market for locally produced fabrics and garments, successful participation in regional trade will require trade facilitation measures. In addition, the creation of the free trade area may result in an influx of products made elsewhere on the continent, which would impact existing artisans and small and medium-sized enterprises (SMEs). In the case of Sierra Leone, anecdotal evidence suggests that its fabric and fashion products may be less competitive than those from elsewhere in the AfCFTA markets. This is due to weak economies of scale, expensive inputs, poor infrastructure and skills deficits, among other factors. These challenges are discussed further in Section 3.

Also important to note is that the growth potential of the fabrics and fashion industry is highly relevant within the framework of the European Union (EU)–Africa partnership, given its strong focus on job creation for women and youth. Support envisaged under the framework of this partnership could particularly help with enhancing the skills, research and innovation capacities of the fashion industry in Africa.

Sources: AfDB, n.d.; Mounzar, 2018; European Commission, 2020; England et al., 2021; Obonyo, 2021

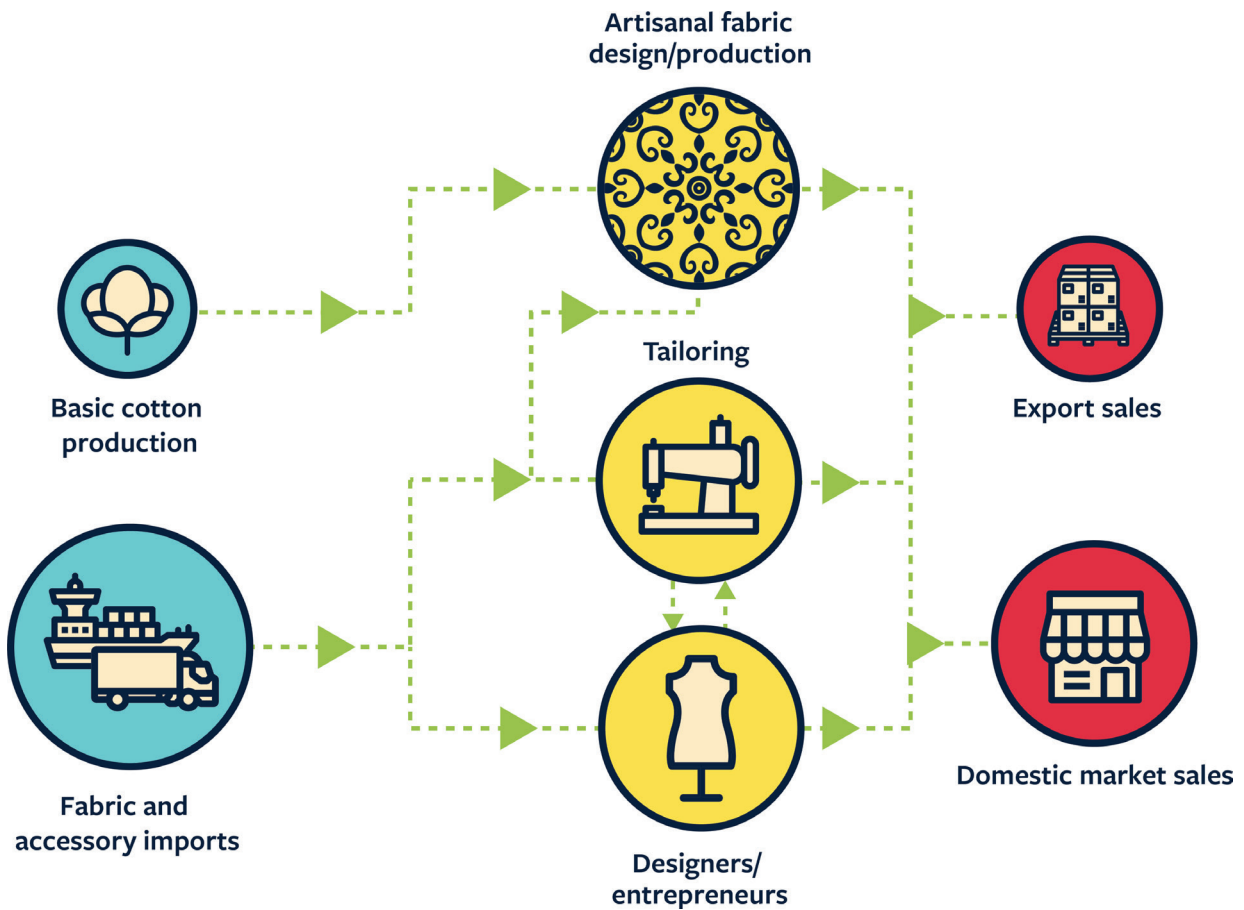
Migration is also central to this story, as many of this modern group of designers learned their skills abroad (in neighbouring African countries, as well as in high-income countries) and returned home, or are ‘homegrown’ but also serve a significant niche ‘nostalgic trade’ diaspora market.

The apparel value chain

Structure of the industry

Figure 1 presents a basic structure of Sierra Leone’s contemporary fabrics and fashion industry.

Figure 1 Structure of the fabrics and fashion industry, Sierra Leone



Source: Authors

As noted in Figure 1, Sierra Leone does have some domestic cotton production, though it is marginal and operates essentially as a cottage industry. Production is located mainly (but not exclusively) in the country’s southeast. Within this production, there are some efforts at fair trade and meeting the traceability and sustainability standards of international markets, but these are faltering and have not taken proper root. Domestic cotton is mainly used for country cloth weaving and, overall, production does not meet demand (in terms of quality, quantity and adherence to

international standards like organic). As a result, there is heavy dependence on cotton imports from neighbouring Guinea, Mali and other West African countries with better developed fabric industries, as well as China, and niche sources for specialist purposes (UK mills, for instance). Accessories and other inputs such as synthetic dyes are also imported from neighbouring Guinea.

Artisanal fabric design and production is also an important activity. This is done by weaving (using cotton country cloth and raffia) and tie-dyeing, with these activities sometimes linked to development projects, but increasingly being taken up by designers/entrepreneurs (as described below). Imported fabrics are also sometimes dyed (and even woven) locally. Artisans' skills have traditionally been passed down through the generations. While these types of skills had previously atrophied and disappeared, there is currently something of a revival of interest in these techniques in the sector. Artisanal fabric design and production is increasingly significant, with artisans having their own outlets for sales (such as in local markets), as well as under long-term arrangements to supply designers. Some artisans also manage to export directly, including with the support of non-designer intermediaries.

The revival of the tradition of country cloth weaving also includes efforts to diminish what has been exclusive male control of this practice. This is creating spaces for women to learn and practise weaving skills and, in the process, has brought new dimensions to the practice (such as a wider range of colours and designs). A similar rekindling and modernisation of *gara* tie-dye skills is underway. Women are prominent in this emerging sector. For example, in early 2022, a leading local firm known as Madam Wokie trained 180 young women in a range of skills, including *gara* tie-dyeing, culminating in pieces featuring on the catwalk of Labrum London's show during London Fashion Week in February 2022.

Tailoring in Sierra Leone is still mostly a cottage industry. There are exceptions to this, which include firms like Fashion One and Izelia, who have invested in machinery that enables them to produce at modest volumes (a few thousand pieces per month). Most designers complain about tailoring as being a major bottleneck in the development of the industry, with the challenge revolving mostly around skills. While tailors have traditionally copied designs from catalogues, or offered their own designs, design is now emerging as a separate activity from tailoring in Sierra Leone.

A handful of designers (probably no more than 20, with the top 7 or 8 being the most prominent) dominate the domestic market and service a small, but not insignificant, diaspora nostalgic trade market. Of particular interest are the designers/entrepreneurs working with authentic Sierra Leonean fabrics, as listed above. Designers use a mix of approaches. Some of them have incorporated artisans within their own supply chain to produce fabrics that they then work into finished products (mainly clothing and soft furnishings home accessories). Some fully outsource tailoring or hire in tailors, while others are essentially tailors with minimal (if any) original design. As such, the distinction between tailoring and design is currently blurred, although design is increasingly becoming its own specialised activity.

The bulk of orders for designers/entrepreneurs comes from domestic buyers (Sierra Leone's slowly growing middle class), expatriates, foreign embassies and missions. They also often service

diaspora buyers and so are involved in exporting, but to this more approachable, niche market. Only a small number of designers/entrepreneurs have managed to break into international markets.¹ As such, domestic sales far exceed exports in terms of volume; however, margins on some export orders can be very attractive.

The business environment

Businesses in Sierra Leone face a generally challenging environment and those operating in the fabric and fashion sectors are no exception. A combination of a small domestic market with limited purchasing power, low land and labour productivity, poor infrastructure, high costs of production and weak economies of scale all undermine the competitiveness of firms in the sector. In addition, businesses in Sierra Leone face limited access to finance; interest rates are high (in the upper 20s) and financing products are limited and ill-suited to the needs of manufacturers (as opposed to, say, traders).

The industry is underdeveloped, highly informal and fragmented in the sense that the different elements of the supply chain are not well integrated; this adds to transaction, coordination and opportunity costs. Skills shortages afflict all segments of the supply chain from traceable, sustainable cotton production, weaving and dyeing (including incorporating necessary innovations in techniques and the use of organic, sustainable dyes, for example), to tailoring and design. Supply chain and business management are also both challenging areas. While technology is not a panacea, more advanced technologies of production across the supply chain – from cotton and dye production, to weaving, to improving traceability – are possible and would bring benefits. Such technologies are not well developed in Sierra Leone.

The policy, regulatory and governance environment

The policy and regulatory environment for businesses is also generally challenging. There are no measures in place to support the productivity, competitiveness and growth of this emerging sector. However, there may be scope for some targeted measures, particularly in relation to exploiting opportunities to integrate into global supply chains, as well as to service growing domestic and diaspora markets. A dearth of reliable data is likely to hamper efforts to persuade policy-makers to provide such measures and incentives. In addition, industry actors are not organised in a coherent manner able to act in the common interest of the sector. The business membership organisation mentioned in Section 1 is new, underdeveloped and not yet in a position to advocate for the sector, resulting in a policy vacuum and missed opportunities where coordination could add value (see more discussion on this aspect in Section 4).

1 This includes established designers/entrepreneurs based abroad and incorporating Sierra Leonean influences into their work. For example, one designer has an outlet in the UK, where they started their design/entrepreneurial journey; one or two others have penetrated online platforms, through which international (non-diaspora) and diaspora sales are transacted; another has had a brand partnership with a high-end Milan brand for accessories.

3 Constraints facing the sector

This section follows the basic value chain structure to explore the different constraints facing Sierra Leone's fabrics and fashion industry. These constraints relate to both the expansion of exports as well as competing with import options – including cheap second-hand clothing – to expand firms' competitiveness of the domestic market.

Cotton production

Although West Africa has a long history of precolonial cotton production and associated artisanal practices (Kriger, 2005), reliable data on current cotton production in Sierra Leone is difficult to find. What is clear is that production is limited, with pockets in the east and north of the country. What little cotton is produced is used mainly for artisanal textile production, such as traditional country cloth blankets and clothing. Some interesting initiatives are seeking to revive cotton production and weaving (see Box 2).

Box 2 The Country Cloth Communities Development Initiative (CCCDI)

In Sierra Leone, the Country Cloth Communities Development Initiative (CCCDI) and its commercial arm, CountryCloth.org, have taken up the challenge of reviving and renewing the tradition of country cloth cotton weaving, starting with addressing the cotton value chain. Working with farmers in the east of Sierra Leone (Kailahun District), CCCDI has supported them to plant organic cotton. However, this effort is in its early stages. The cotton is not yet officially certified using one of a range of internationally recognised voluntary standards.

To revive the dying art of cotton weaving, CCCDI has worked with master weavers, who are practitioners and custodians of the traditions (historically dominated by men and from which women were excluded), to teach these skills to others, including women. Some 50 people have benefited from this skills training, located in Kailahun, Bonthe (to the south of Sierra Leone), and Freetown, the capital city to the west. CCCDI's commercial arm, CountryCloth.org, has recently opened a shop in the central business district of Freetown, from which it sells country cloth and raffia items.

Modernisation of country cloth weaving has come from use of yarns imported from Yorkshire mills and by using a wider range of colours (an innovation associated particularly with women weavers, who prefer brighter colours than the traditionally more muted shades from natural dyes extracted from indigo, kola nut and bark). CountryCloth.org concentrates on the fabrics, outsourcing design and tailoring, though it retains the customer relationship.

CountryCloth.org runs its own online ecommerce portal, Apará (though it was inaccessible at the time of writing, as the company is shifting to a different platform). It also partners with other outlets, such as UK-based The African Fabric Shop. However, like other firms in this emerging sector, CountryCloth.org is constrained by the high cost of exporting items from Sierra Leone to customers around the world. For now, the founder typically moves products in her suitcases when she travels.

Skills and talent constraints

A significant finding from the interviews with businesses was that industry players lamented skills shortages at every stage of the value chain. Many of the fashion business owners consulted had run their own training programmes for young tailors. Perhaps because women entrepreneurs and leaders play such a prominent role in Sierra Leone's emerging fabric and fashion sector, it is unsurprising that many of them explicitly set out to use these training schemes to equip and empower young women to play more prominent roles in their industry. The motives for these training initiatives appear to be part commercial and part social enterprise. For instance, Fashion One has trained tailors, some of whom have been hired or contracted, with others encouraged to set up on their own.

As noted above, design skills of various kinds have atrophied in Sierra Leone. Efforts are underway to revive once-thriving practices of country cloth weaving. Sierra Leone also used to be famous for its vibrant tie-dye *gara* designs, centred mostly around Makeni in northern Sierra Leone. Traditionally artisans would sketch out their intricate designs and tie the cotton cloth in ways to match the designs visualised, and then dip the cloth in different combinations of dyes to produce the desired effect. The more intricate designs might take months to tie, dye, untie and finish. Paradoxically, some of the most minimalist designs demand the most skill, patience and attention to detail, in contrast to some of the more popular conventional designs of swirls of rich colours, which are relatively easier and quicker (and thus cheaper) to produce. Examples also exist of businesses reviving these lost artisanal skills of tie-dye (see Box 3). Also popular around West Africa, including Sierra Leone, are waxed batik cloths (although this cloth, also known as 'Ankara', has its roots in Indonesia and only made its way to Africa and into different African cultures in the mid-19th century).

Box 3 The revival of artisanal tie-dye skills

Nenehgaleh Jalloh of Nenehgaleh Gara learned her tie-dye skills from her mother growing up in Makeni. Now as a graduate and professional working for an international NGO based in Freetown, she has returned to the craft of her childhood to help revive the lost artisanal skills of tie-dye *gara*. She is a passionate advocate for the lost art. Cheap Chinese imports that imitated the most popular Ankara designs helped to decimate both locally designed batik and *gara* sales. While the quality of the Chinese imports could not match that of the original homegrown offerings, they won on price.

Nenehgaleh's older sister, Mrs Jariatu Kargbo, became one of Makeni's go-to *gara* designers, whose products would fly off the shelf in the *gara* heyday. These days, she continues to produce designs either for herself or on commission from her younger sister, Nenehgaleh, but she has since had to diversify her business interests with a building supplies store, a bakery and other ventures.

At peak production, Jariatu had artisans responsible for each stage of the *gara* production process based at her compound in Makeni. Some people specialised in tying the fabric, then there was the mixing of the dyes according to the desired final design. Knowledge of how primary colours mix to produce secondary colours was key. Once the fabric had gone through the required iterations of tying and dyeing, there was the final process of pressing or hitting the fabric to give it a shiny, pressed look (which also comes from the thin layer of wax used in the pressing process).

When Jariatu operated at scale, she had her own dedicated fabric hitters with their own space in her compound. Now, with smaller volumes, this function is outsourced to artisanal specialists located in Manikala, a once-thriving part of Makeni (although these days it appears deserted, like a 'ghost town'). Nenehgaleh relies on hitters from Mali, who have their own specialist equipment in the form of hefty wooden devices shaped like large bells that weigh several kilograms, to hit the fabric. According to Nenehgaleh, this hitting/pressing process results in fabric that will retain its neat, shiny look – even after years of repeated wear and washing.

Though largely retired, Nenehgaleh's mother still produces exquisite *gara* designs. She is not formally trained or educated, but will sketch out her vision for original designs that the tiers and dyers will interpret and impose on the fabric.

Nenehgaleh's business model is to focus primarily on the sale of her original *gara* designs, which her customers convert into finished clothing items. A strong driver of sales are occasions such as weddings. Sierra Leone, like other parts of West Africa, has a tradition of wearing 'aso ebi', which according to Wikipedia translates from Yoruba as family (*ebi*) cloth (*aso*). The Krio (Sierra Leone's lingua franca) version is 'ashobi'. A large wedding might feature several groups of family and friends (mostly women, but men do participate as well) commissioning their own *ashobi*. Often the bride and groom sides will start off with their own dedicated *ashobis*, but by the final wedding party everyone is in the same *ashobi* – depicting the successful union of the two sides of the family. Sierra Leoneans have exported this tradition to the various parts of the world where they have settled. These weddings and special occasions have become a significant driver of local designers' exports.

With the flooding of the market with cheaper imports, and the drop in demand for the more traditional *gara* designs, artisans who once were kept busy meeting demand for locally made *gara* fabrics have drifted away into other occupations. Scope and opportunities exist to revive and reimagine *gara* tie-dyeing for the 21st century, taking into account shifting tastes and now with this strong emphasis on Afrocentric authenticity, sustainability, traceability, circularity and transparency, which is increasingly a hallmark of the global apparel industry.

Because of the on-demand, bespoke nature of Sierra Leone's fashion industry, tailoring has not yet embraced production of clothing to standardised sizes. This is a key skills constraint that hampers exports to markets that operate on such standardised bases. Most Sierra Leonean

diaspora fashion industry entrepreneurs, who are keen to source clothing from Sierra Leone, complain of this constraint. In Sierra Leone itself, the industry has not yet evolved to being able to sustain significant off-the-shelf sales through shopping malls or markets. Such business model evolution will require a shift in the financing model, not only on the production side because more capital will need to be tied up in stock before sales can generate returns, but also on the consumer demand side, which is largely ‘cash-and-carry’ at present.

Discussions with fabric and fashion industry actors also revealed skills gaps in procurement and supply chain management. Many actors complained of poor-quality accessories (such as zips). It is unclear the extent to which this is primarily a question of final customers being unwilling to pay the price for better quality, versus accessory importers being unaware of the widespread demand for better quality, potentially offering scale economies and thus better affordability of quality supplies. However, in today’s more globalised marketplace, it is not obvious why those in the fabric and fashion industry need to rely on local importers if they are not meeting their needs. Purchasing directly from source, whether in China, Turkey or elsewhere, is an option. Here again, industry-wide coordination and aggregation of demand is likely part of the solution.

Firms noted that tailors often lack the skills to use the newer, larger and more sophisticated machines they are bringing in to handle a wider range of fabrics. Many of the firms in the fabric, fashion and soft furnishings sector rely on second-hand machinery, purchased from more advanced markets that have migrated to more sophisticated technology. In Sierra Leone, most of the companies using machinery rely on a handful of technicians to maintain their equipment. As a result, they sometimes experience downtimes while awaiting attention from overstretched technicians. The shortage of these types of technical skills is an additional constraint facing businesses in the sector.

Limited freight options undermining competitiveness of exports

Firms and entrepreneurs with export aspirations pointed to the limited options for moving their products from Sierra Leone to target markets abroad. Some businesses have opted not to sell abroad at all. For example, Pangea has not yet taken up an e-commerce presence for this reason. Fashion One reported that it has turned down sales enquiries from abroad, but will deliver to local recipients for onward delivery to an overseas customer as long as the customer takes full responsibility for the export element. Others rely opportunistically on passenger travel and moving goods in suitcases. These ad hoc arrangements can still result in a delay in getting goods to overseas customers. Where timely delivery is essential, these arrangements do not work.

Other firms have used the limited commercial options available. At the time of this research, three firms were offering courier services: DHL, EHS and a recent start-up, dotBleu. EHS reportedly charged around £160 for a 5kg consignment delivered to the UK. Within the UK, there was a £70 delivery charge (or the consignee could arrange collection at their own cost). Movement of the consignment onward to the USA would cost another £20 (with local delivery charges to be added on). DHL costs

may be in the range of between £96 and £130 per kilogram. However, with guaranteed monthly volumes, DHL offers a commercial rate that is significantly cheaper.² dotBleu claimed to be able to compete with these costs, though for now it focuses just on the US–Sierra Leone (SL) corridor. dotBleu seemed open to the possibility of fabric and fashion firms grouping their consignments to avail themselves of deeper discounts; it was reported that other courier firms ‘frowned on’ this approach, presumably as they worried about the impact on their overall business model.

Generally, it is clear that fabrics and fashion firms have not fully explored or exploited opportunities to reduce their costs and widen their options by leveraging potential economies of scale and collective bargaining power.

Absence of intellectual property rights regime

Creativity and design lie at the heart of the fabrics and fashion industry. Yet there is no regime of intellectual property rights protection operating in Sierra Leone. The industry seems replete with unethical theft of intellectual property and presentation of designs as original when they are anything but. This constraint represents a fundamental threat to the evolution of Sierra Leone’s fabric and fashion industry. At the individual level, theft of intellectual property serves as a disincentive for creative entrepreneurs to organise ventures to exploit their creative talents. For instance, the designer referred to in Box 3 has altered the way she advertises her *gara* designs online, because she noticed unethical copying when she portrayed the whole design of a *gara* piece. Now she only shows the folded cloth – so the whole design is not visible or copyable.

Intellectual property theft by those with mass production capabilities in other countries poses a threat to the competitiveness of the industry, as has been proved over the last few years with the flood of copied Ankara designs onto the market. But a widespread culture of ‘copy and paste’ within the fabrics and fashion industry presents a reputational risk for Sierra Leone as a whole. Such a reputation would make it harder for designers to penetrate the fashion shows, which are an increasingly important way to gain international exposure.

Intellectual property rights protection is not a new policy and regulatory concern for Sierra Leonean creatives. Before now, both the film and music industries have been undermined by rampant copying and distribution of original creations, with none of the proceeds making the way back to the originators through royalties or other payments. Effective policy reform – with the promulgation of laws, regulations, policies, procedures, and rewards and sanctions that are well designed and implementable – will require considerable collective action not only on the part of the fabric and fashion industry, but in collaboration with other similarly affected creative industries. Significant policy and regulatory reform may be some way off, but the fabric and fashion industry can take steps now to shift norms and to discourage intellectual property theft.

2 EHS and DHL prices are quoted from business users of the services and were not verified directly from the companies themselves.

Limited access to finance

No analysis of business constraints in Sierra Leone would be complete without a section on limited access to finance for businesses. The lack of working capital hugely constrains industry growth, especially in the way it hampers firms from taking on larger orders, which typically require an element of pre-financing. For instance, firms like Fashion One and Izelia have the production capacity to take on industrial orders at the smaller end of the spectrum, but without working capital they are prevented from putting their capital investments to productive use. To meet a largeish order for *gara* for a wedding, NenehGaleh Gara typically sources her inputs from Guinea, where she can secure supplies in larger volume (including chemicals for the dyeing process, bales of cotton and dyes) than are typically available in Sierra Leone. A lack of adequate working capital constrains operational efficiency, because a business may be forced to make two buying trips to Guinea spread over a few weeks as it gathers funds from other sales to fund the required purchase of the large order.

Other local businesses, such as Bivamiks, also raised the issue of working capital challenges hampering business growth. Bivamiks specialises in unique designs, mainly for women, providing an end-to-end service. This includes sourcing and selecting fabrics (which many working professional women value, as they lack the time or desire to search out fabrics), as well as designing the outfit and commissioning the tailor or seamstress. Bivamiks runs its own shop and has tailors on-site using the company's machines. Limited working capital options constrain what the business can do, at what scale and within what timeframe.

Firms seeking to expand beyond the on-demand bespoke sales to off-the-shelf sales are particularly constrained by limits on availability of working capital. Vivid Emporium focuses on serving (mainly) Afrocentric consumers in the US, while production takes place in Sierra Leone. This means shifting a minimum cargo load of 100kg of goods from Sierra Leone to the US. Apart from the high freight costs, Vivid Emporium finds it has capital tied up in stock that would otherwise be used for producing more fashion and home decor items.

Access to finance was a universal theme for businesses operating in this emerging sector. Sierra Leonean banks tend to be slow to develop new products in response to emerging trends. It is quite possible banks have not taken a close enough look at the fundamentals of the emerging fabrics, fashion and furnishings sector based on Sierra Leone's unique country cloth and *gara* tie-dye. This could be another area where more joined-up, concerted action by industry players backed by their association could pay dividends. The first task would be to put together some solid numbers depicting the trends in demand in Sierra Leone and abroad, alongside production costs, sales and margin forecasts to convince bank loan officers that there is a potentially good 'win/win' proposition they could make to fabric, fashion and furnishings businesses.

Limited support for R&D and product innovation

A final constraint worth mentioning is in relation to research and development (R&D). Few businesses highlighted it directly, but the need for innovation and thus R&D in areas such as a return to or intensification of a use of organic dyes was evident. Sustainability in various guises was of concern to several businesses interviewed. For instance, Pangea placed great emphasis on managing the firm's waste footprint through the use and reuse of materials in a circular production mode. They reported successful experimentation with ways to produce beautiful wooden beads from the wood shavings from their carpentry department. CountryCloth.org sells journals wrapped in a dyed yellow cover that gets its colour from turmeric. Pangea has also experimented with avocado, onion skins and turmeric. Izelia also favours a return to natural dyes in the company's *gara* tie-dye designs.

At a time when the global fabrics industry is experimenting with, for example, cacti as alternatives to leather, this is an opportunity for producers in Sierra Leone to lead the sustainability field. This will only be possible if they can ally their efforts with science and technology labs that can test new products and combinations to ensure there are no harmful impacts for human health and to find the most durable combinations to minimise fading, running when washed, and ensure products have adequate protection against wear and tear.

Conclusion

Several constraints hamper the growth and expansion of Sierra Leone's fabrics and fashion industry. However, these constraints are not insurmountable – although there are few 'quick fixes' available. Some constraints will manifest at the level of the individual businesses. There are firm-level solutions to some of the challenges and constraints firms in the emerging fabrics, fashion and soft furnishings sector face. And there is potentially a strong public interest case in the provision of firm-level support in the form of tailored and targeted technical assistance. This would most likely be delivered on a cost-sharing basis between government and firms, with close monitoring to ensure a good alignment of incentives to ensure companies are translating the support into the desired investments in improvements in their overall performance and market penetration.

However, while these micro-level interventions are necessary, they are not sufficient to bring about lasting and meaningful change in the sector's performance, as measured by increased exports, productivity, competitiveness and growth of the sector. Complementary efforts at the meso level are required to drive coordinated changes in conditions that benefit clusters of firms that may be competing at one level but, at the same time, require concerted solutions to business environment challenges. Ideally, industry actors will drive these changes, as they are best placed to know where their greatest challenges lie. Unfortunately, 'the Catch-22' is that the sector needs to be sufficiently organised, cohesive and coherent to pursue such shared interests for mutual gain. Experience teaches that external facilitation support may be needed to help nudge industry

actors to act in their own collective self-interest. Using its considerable convening power, the FCC, in partnership with other actors, is playing a key catalytic role, and there is potentially a lot more it could do to add value.

At the macro level, again, concerted action will be required to make the public interest case to effect the policy reforms needed to improve conditions for investment in, and growth of, the sector. Lobbying for changes in policies is even more far-removed from each individual firm's immediate challenges. There may be few incentives at this stage to invest the time and effort required to effect change (which, in any case, is not guaranteed as government may have its own conflicting priorities). In this context, the potential for collective action by fabric, fashion and soft furnishings entrepreneurs and enterprises is important to catalyse and propel growth of the sector. Opportunities for this are discussed in the next section.

4 The potential for collective action

The Fashion and Textiles Association, Sierra Leone

Interactions among industry actors during earlier consultations between the cities of Freetown and Milan served as the trigger for 10 industry actors to form the Fashion and Textiles Association Sierra Leone (FaTASL) in June 2021. Founding members include Just Fabulous and Fashion One. FaTASL was not the first attempt to form an association. One or two individuals had registered organisations before, but they had never managed to capture the imagination or interest of a critical mass of actors to form the basis for a viable organisation with sustainable momentum. The emergence of this nascent business association is, therefore, already a significant step forward.

FaTASL highlights industry coordination as its first aim. Second, it sets out to change perceptions of the industry and to raise awareness of the sector's contribution to Sierra Leone's development. Objectives to achieve this aim include industry training, advocacy, radio shows, trade shows and business profiling. The third aim is to develop the capacity of fashion and textiles designers to become competitive nationally and internationally. Fourth, FaTASL aims to reinvent Sierra Leone's culture and traditions around costumes, fabrics and symbols to position them in alignment with contemporary trends and preferences. Fifth, FaTASL aims to influence government policy around trade rules, taxes and importation, to enhance competitiveness at the firm and sector levels. Finally, it also aims to showcase FaTASL through trade shows, trade fairs and exhibitions.

Given some of the constraints that actual and potential FaTASL members have highlighted, it seems clear that FaTASL's aims and objectives are well aligned with identified problems. It will also be important for FaTASL to find practical ways to help its members and the industry in Sierra Leone align with important global trends towards sustainability, traceability, circularity and transparency, given that these will significantly shape the Sierra Leone industry's ability to penetrate global value chains and find suitable export market niches in future. FaTASL could also potentially support more of a regulatory function, by nurturing shared values among the membership to support creativity and to decry and sanction the theft of intellectual property. The scope of the association remains somewhat unclear, including whether it is intended to encompass firms operating across the entire value chain. Fashion designers have their own ecosystem of seasonal unveilings, fashion shows and legitimisation. It is possible that the creatives and designers may overshadow the less recognised and celebrated elements of design and other essential businesses within the wider apparel value chain. All of these are issues that will, no doubt, be dealt with as the association grows from its present start-up phase.

What is clear is the emergence of FaTASL has the potential to galvanise much needed collective action that could support the development of Sierra Leone's fabrics, fashion and soft furnishings sector. The rest of this section surveys the opportunities for collective action by FaTASL (or any other business membership association) to positively influence Sierra Leone's business environment and investment climate in support of the fabrics, fashion and soft furnishings sector.

Improving conditions within Sierra Leone's business environment

In 2020, Sierra Leone ranked 163 out of 190 countries in the now-cancelled World Bank's Doing Business ranking. By any measure, doing business in Sierra Leone is difficult. In particular, the gulf between the public and private sectors is challenging; there is a pattern, for example, of government ministries tabling legislation in parliament with inadequate consultation with the private sector, even though the proposed changes have significant implications for their operations, costs and competitiveness. However, upcoming reforms may work in FaTASL's favour, as it seeks to improve conditions for its members and the sector. Both the Government of Sierra Leone and the private sector have begun to recognise the importance of public-private dialogue (PPD) as a basis for addressing the most pressing concerns hampering business productivity, competitiveness and growth in Sierra Leone. Indeed, draft legislation under consideration by parliamentarians in Sierra Leone would take a significant step toward institutionalising PPD.

At the same time, the private sector has a poor track record of presenting consensus and evidence-based proposals to government on the basis of their contributions to advancing the public interest. A key potential ally for FaTASL as it begins to engage in the PPD space will be the Sierra Leone Chamber of Commerce, Industry, and Agriculture (SLCCIA). Historically, SLCCIA itself has been weak and is often criticised by its private sector members (and even those who see no point in joining it). However, SLCCIA at the time of writing was in the process of developing a working relationship with the National Investment Board, a government entity at the forefront of private sector-related matters and anchor institution for PPD across government. SLCCIA also intends to modify its governance structure to provide space for sector-specific business membership organisations to have representation on SLCCIA's council. This move is intended to help the private sector present a more coherent, cohesive and coordinated interface with government. FaTASL should aim to take its place in the SLCCIA council. In addition, FaTASL can also affiliate with the Sierra Leone Association of Manufacturers, which is vocal and visible in its engagement with government. If FaTASL members focus on organising cotton production, the association may also choose to affiliate with the Sierra Leone Chamber for Agribusiness Development.

While the advent of more PPD in Sierra Leone is welcome, participants must have substance around which to talk. A major challenge FaTASL will face is gathering data upon which to build a case for governmental strategic support. For this, technical expertise and resources will be needed. It will be necessary to demonstrate to policy-makers the potential of the fabrics, fashion and soft furnishings sector to contribute to inclusive economic growth in Sierra Leone and to export earnings (in much-needed foreign currency). Furthermore, it may be possible to make a credible case that the fabrics, fashion and soft furnishings sector has the potential to 'punch above its weight' by burnishing Sierra Leone's brand and image abroad. Meeting this challenge would require a major collective emphasis on branding, storytelling and communication.

Branding, storytelling and communication

A key challenge for Sierra Leone's fabrics, fashion and soft furnishings sector is to project a confident, creative, original and authentic story about Sierra Leone. Madam Wokie, CountryCloth.org, Bivamiks, Vivid Emporium, Pangea, Izelia and NenehGaleh Gara are among the brands leading the way. The MiSL brand has the potential to be the whole that is greater than the sum of the individual parts. Momentum is building behind MiSL, giving focus to in-country design and manufacturing initiatives. FaTASL members can contribute to the MiSL brand by providing content for videography features and by collaborating to organise events that showcase the talent and products of FaTASL members. Scope exists to collaborate, particularly for those local brands with strong sustainability stories to tell, with FaTASL strategically supporting such initiatives.

The sector can also work collaboratively with media practitioners to deepen the understanding of the potential and challenges faced by the industry. For instance, the Sierra Leone Association of Journalists (SLAJ) recently established a network of affiliated journalists – the Business and Economics Network (BEN) – to help journalists better understand and report on business and economic stories. A strategic partnership between SLAJ–BEN and FaTASL could be symbiotic and mutually rewarding.

An important aspect of the fabrics, fashion and soft furnishings story should be the inspiration provided to young designers, tailors, seamstresses and artisans to join the industry. A new generation of creatives will no doubt bring their own unique visions and perspectives to build upon the foundation of culture and traditions already in place. Fabrics and fashion have important roles to play in contributing to Sierra Leone's cohesion at a time when concerns about politically inspired ethno-regional polarisation are mounting. The fabrics of Sierra Leone – with their roots in the east, south and north of the country but which come together in the west (the capital city, Freetown) – have the potential, literally and metaphorically, to weave Sierra Leone together, thread by thread..

Leveraging local content measures to boost competitiveness

The Government of Sierra Leone is one of the largest consumers of goods and services in the country. FaTASL members are well placed to bid to provide some of the goods and services the government needs, such as soft furnishings for offices and uniforms for personnel. FaTASL could align such a local content strategy with its communications and outreach efforts, to strengthen opportunities for members to bid for similar contracts from large international investors that typically rely on overseas firms to fulfil such requirements.

However, a local content strategy poses several risks for the fabrics, fashion and soft furnishings sector and thus FaTASL and members should approach with caution and sound risk-mitigation strategies. As countless Anti-Corruption Commission (ACC) regimes in Sierra Leone can attest, government procurement is a large source and cause of corruption in Sierra Leone (private

sector and international community procurement are also vulnerable). Despite efforts by the national procurement watchdog, the Audit Service Sierra Leone, and the ACC, these problems have proved intractable and persistent.

With eyes fixed firmly on international markets, FaTASL members should concentrate on competing not based on their internal connections, but on more conventional measures of productivity, competitiveness and innovation. Although FaTASL will naturally want to expand its membership base as the fabrics, fashion and soft furnishings sector grows, it should be wary of becoming a focus of interest and entryism by politically connected vested interests determined to capture contracts to the detriment of the long-term health and viability of the sector. Indeed, there is a risk of FaTASL itself being captured by political interests and turned into an arena of competition between battling political forces.

Intellectual property rights reform

Sierra Leone's non-existent regime for intellectual property (IP) rights protection represents an existential threat to the country's fabrics, fashion and soft furnishings sector. It effectively incentivises theft of intellectual property and punishes those inclined to undertake the additional cost and effort of original creation. Brand MiSL cannot thrive under such conditions. However, effecting change demands far more than a mere change of the laws on the statute books. Scholars warn that states locked in a low capability trap will often engage in, 'isomorphic mimicry... the ability of organizations to sustain legitimacy through the imitation of the forms of modern institutions but without functionality' (Pritchett et al., 2012: 14). Efforts to develop an intellectual property rights system in Sierra Leone by simply adopting the legislative and institutional approaches of high-income countries, certainly risk falling into this trap. In a similar fashion, external actors (such as international development partners) can stifle the evolution of locally adapted, 'good enough' solutions to problems in favour of international 'best-in-class' solutions that result in 'premature load-bearing', which overloads the system (ibid.: 3). It will be important for Sierra Leone to find its own locally-appropriate solutions for this challenge. As many African countries are facing similar challenges – and issues around IP protection extend beyond national borders – regional learning, exchange and cooperation will be essential in this area (see Box 4).

For complex reforms such as intellectual property rights protection, FaTASL will need to build a strong coalition for change. Such a coalition would likely include other creatives similarly harmed by imitations and theft, reform-minded policy-makers, actors within international development partners, and others. Those in favour of reform will need to devise an agile, adaptable strategy oriented around accumulating a series of small wins that build momentum over time and create more favourable facts on the ground that can sustain and support more ambitious reforms.

Box 4 Protecting intellectual property rights in the fashion sector

The registration of new and original fashion designs can help protect businesses against others who might copy the original aspects of their designs. There are a variety of uses of IP by the fashion industry. Designs can be registered under copyright law, though the scope is not always clear, while large fashion houses will often seek protection for their brands through the registration of trademarks. This tactic can also be important for small start-up businesses and emerging designers. Patents, while less relevant, can be important for technical innovations, such as if applying a process to create new types of fabric (for example, stone-washed, washable, waterproof fabrics).

Despite the significant investments made by designers in their craft, many do not register and protect their designs, one key reason being products often have a short life cycle over the fashion season. In particular, small and medium-sized businesses often pay little attention to the IP system. Some countries such as the UK and EU offer ‘unregistered design protection’. This is considered useful for the fashion sector, and for small businesses with financial constraints, because it is easier to access, with no registration procedure and no application fee; it is available for a three-year time period only.

A review conducted by the World Intellectual Property Organization (WIPO) looked at how better use could be made of the IP system in the African fashion design industry. It found a ‘severe lack of awareness of IP rights and their associated benefits’ (WIPO, 2015: 1). Reviewing policies and systems in Cameroon, Ethiopia, Ghana, Nigeria, Senegal, South Africa and Zimbabwe, it found that although all countries had adequate IP laws, all suffered from ‘under-resourced IP offices and enforcement agencies’ (WIPO, 2015: 2).

WIPO makes very broad recommendations to governments, including: working in coordination with the ministries of trade and industry to strengthen national IP offices; making available online IP filing and registration; and providing training seminars on the benefits of IP for the fashion industry and ensuring IP aspects are included on the curricula of fashion schools.

A particularly critical aspect for African fashion is the need for protection for designs that are considered ‘traditional cultural expressions’ (TCEs), which can also be protected under IP systems. In Ghana, for example, *kente* cloth has been given protection as a TCE under copyright law. However, this has not automatically translated into protection in practice and Ghana has been particularly affected by mass production and copying of *kente* (and other traditional textiles) outside the country. A designation as a TCE can also be combined with the use of trademarks, a strategy that has been used successfully by Maasai groups in Kenya and Tanzania, for example.

A more comprehensive solution may also lie in a system of geographical indications (GI) protection, which is considered appropriate as it offers protection for rights that are owned collectively by traditional producers. Negotiations under the African Continental Free Trade Agreement (AfCFTA) offer an opportunity to revisit and redesign IP systems, including GI aspects, across Africa. The collective interests of Africa’s growing fashion design industry, along with investigating the most appropriate local solutions, should be a focus of these efforts.

Sources: WIPO, 2005; WIPO, 2015; Vézina, 2019; Okyere and Denoncourt, 2021

Coalition building, allies and collaborators

Building successful coalitions will be a key strategy for FaTASL to deal with a range of issues, including those already mentioned as priorities for collective action. A key point for FaTASL members is that desired policy reforms cannot be approached as quick technical fixes. Rather, the association will need to learn to think and work politically as it seeks reforms. This will require allies and collaboration with a broad group of stakeholders. Table 1 offers a preliminary mapping of allies and collaborators, illustrating the areas of interest of each of the key actors that could offer important contributions to support the sector’s development.

Table 1 Mapping of allies and collaborators for the fashion, fabrics and soft furnishings sector

| Allies and collaborators | Areas of interest |
|--|--|
| Government of Sierra Leone ministries, departments and agencies | |
| Directorate of Science, Technology and Innovation (DSTI) | DSTI has recently led on an entrepreneurial ecosystem mapping exercise and an assessment of Sierra Leone’s science, technology and innovation (STI) landscape. The latter should be of particular interest to FaTASL and members, given the opportunities that now exist for breakthroughs in the use of natural, more sustainable inputs for the fabrics, fashion and soft furnishings industry, including organic cotton and dyes and circular products. |
| Sierra Leone Local Content Agency (SLLCA) | SLLCA’s mandate includes championing local content and enforcing the law in this arena. As noted above, FaTASL must remain mindful of potential risks and pitfalls, but seek to leverage opportunities for government to set a level playing field for competition and access to markets from which the sector can grow. |
| Ministry of Trade and Industry | This will be the key governmental stakeholder for the fabrics, fashion and soft furnishings sector, particularly at the production and export end of the value chain. |
| Ministry of Agriculture and Forestry | Support from the Ministry of Agriculture and Forestry will be key in any efforts to improve sustainable cotton production. |
| National Council for Technical, Vocational and other Academic Awards (NCTVA) | Upgrading and standardising skills across the sector will necessitate working closely with the NCTVA. |
| Universities | |
| University of Makeni (UNIMAK) | UNIMAK is one of Sierra Leone’s most entrepreneurial and innovative tertiary institutions. Because it is based in Makeni, traditional home to the <i>gara</i> tie-dye industry, the university is interested in regeneration, as well as upgrading the skills of artisans still engaged to bring practices more into the modern era. UNIMAK is renowned for its entrepreneurship courses, which could also help to boost the fabrics, fashion and soft furnishings sector. |
| Njala University | Njala is Sierra Leone’s top agricultural educational institution and will thus be a likely partner in efforts to improve cotton production and potentially to explore the use of organic dyes. |
| Fourah Bay College (FBC), University of Sierra Leone | The college was once well respected for its engineering department (among others) and could be a key ally in helping the fabrics, fashion and soft furnishings sector address skills gaps in areas such as sowing machine technicians, for example. |

Allies and collaborators **Areas of interest****International development partners and NGOs**

| | |
|---|---|
| Sierra Leone Economic Diversification Programme (SLEDP), World Bank | SLEDP focuses on economic diversification and is therefore a good fit for the fabrics, fashion and soft furnishings sector. Entry points might be through its existing grant mechanisms, to which FaTASL members can apply, but also at the more strategic level to explore modalities for bespoke interventions to boost the sector. |
| West Africa Competitiveness Programme (WACOMP) | WACOMP includes in its focus strengthening the competitiveness of Sierra Leone's textiles sector, so there is clear scope to identify synergies and areas for collaboration. |
| Invest Salone | Invest Salone already supports firms in the fabrics, fashion and soft furnishings sector. There may be scope for more ambitious interventions, given that Invest Salone also seeks to work strategically with business membership organisations. |
| Solidaridad | This NGO would be a key ally if FaTASL members decide to focus on improving cotton production in Sierra Leone. It has a wealth of experience in supporting the cotton sector across Africa. Even if scope for improvement of cotton production is limited, Solidaridad may still be able to work with FaTASL to develop an integrated subregional supply chain to strengthen the sustainability and traceability of Sierra Leone's exports. |

Source: Authors' compilation

In addition, there are development finance institutions (DFIs) that could provide important support to boost Sierra Leone's fabrics and fashion sector. Some form of concessionary finance, typically available through DFIs, will most likely to be needed. However, being a fragile state (or frontier market), Sierra Leone typically struggles to attract even DFIs despite their developmental mandate. The recently formed Africa Resilience Investment Accelerator (ARIA) 'brings together development finance institutions to unlock investment opportunities in transition states in Africa' (ARIA, n.d.). Taking a cluster approach, Sierra Leone's fabric and fashion sector may be able to attract such support, channelled through local financial institutions, whether commercial banks or some of the larger deposit-taking microfinance institutions (which are regulated as banks). Box 5 provides a further example – the Women Entrepreneurs Finance Initiative (We-Fi) – which could also potentially offer access to finance for businesses and strategic support to transform the enabling environment for the fashion and fabrics sector in the country.

Box 5 Women Entrepreneurs Finance Initiative

Founded in 2017, and funded by 14 governments, We-Fi is a collaborative partnership between governments and multilateral development banks (MDBs), with the We-Fi secretariat housed in the World Bank. It aims to support women-owned and led small and medium-sized enterprises (WSMEs) through its four pillars: access to finance; access to markets; access to training, mentoring and networks; and improving the enabling environment. A lot of We-Fi's work is not sector specific and focuses broadly on providing support and a more enabling environment for all WSMEs, particularly working with national financial institutions to identify and develop financial products that are appropriate for WSMEs. However, some sector-specific work is ongoing in Africa, including in relation to horticulture, staple foods and the technology sector. There appear to be no active We-Fi initiatives framed around fashion in Africa yet.

In Sierra Leone, there are a number of We-Fi initiatives ongoing, including a programme led by the Islamic Development Bank to support WSMEs in rice value chains. There is also a small initiative called 'WeTour', which is collecting data on WSMEs in the tourism sector in West Africa. It seeks to trace the dynamics of women's entrepreneurship in the tourism sector, with pilots currently in Ghana and Sierra Leone. This is important data gathering that can be leveraged to unleash financing and strategic support. The fashion industry would benefit greatly from a similar data-gathering exercise.

The Africa-wide Affirmative Finance Action for Women in Africa (AFAWA) programme, coordinated by the African Development Bank (AfDB), also operates in Sierra Leone. It offers technical assistance and tailored financial products to WSMEs. AFAWA is also able to support targeted, special initiatives to transform the enabling environment for WSMEs and could be a key ally to the fashion and fabrics industry in Sierra Leone.

Generally, We-Fi's experience supporting women entrepreneurs around the world and its unique role within the development finance architecture would make it a very attractive partner for fashion industry development in the country.

Sources: We-Fi, n.d.; We-Fi, 2021

In addition, the AfDB's Fashionomics Africa platform may be another relevant stakeholder. It seeks to support African entrepreneurs to grow their businesses in the textile, apparel and accessories industry. In particular, it facilitates access to markets via the development of an online platform. It can also support access to finance, and provide mentorship, networking and training opportunities (AfDB, n.d.; Mounzar, 2018). Fashionomics Africa would also be a potentially important platform to support business development in Sierra Leone in this sector.

5 The way forward

Conclusion

The development of Sierra Leone's fabrics, fashion and soft furnishings industry is accelerating, with several positive trends apparent, including the revival of the tradition of country cloth weaving and the modernisation of *gara* tie-dye skills. While promising, Sierra Leone is unlikely to emerge as a highly competitive location for global brands seeking to diversify their supply chains. However, the country still has something to offer: the growing demand for sustainably produced, ethically sourced authentic fashion (including accessories) distributed through increasingly specialised, niche platforms and channels, means there is a future for Sierra Leone's growing fabrics and fashion industry.

A snapshot of where firms are now on a spectrum would place some with an international presence and even participation in international fashion shows, some of these with products that would not look out of place in high-end international catalogues or on the shelves of stores in Milan's *quadrilatero della moda* (fashion quadrilateral) or London's West End. Others are experimenting with innovative business models and online platforms. Several have dedicated themselves to reviving, regenerating and reimagining Sierra Leone's rich history and tradition of fabrics to produce functional pieces of beauty fit for the 21st century, including paying attention to contemporary challenges of sustainability, traceability, circularity and transparency. The industry has much to offer potential partners and counterparts.

Nevertheless, there are still plenty of needs and constraints to address, as detailed throughout this case study. Some of these can be addressed at the individual firm level (through technical assistance, for instance); however, the bulk require elusive (to date) collective action. This is where the business membership organisation, FaTASL, will need to play a crucial role (almost certainly with a lot of external support).

The decision by most players in the sector to work largely in isolation (though there are pockets of collaboration and cooperation) is a rational one given the conditions that have prevailed up until a year or two ago. Now the calculus is shifting to the point where investment in collective action is likely to yield dividends for the individual and the collective. Indeed, a failure now to work collaboratively would be a strategic blunder that would undermine prospects for the ascent of Sierra Leone's fabrics, fashion and soft furnishings industry. Thus, the Freetown–Milan city-to-city fashion industry partnership comes at a fortuitous time when Sierra Leone's fabrics, fashion and soft furnishings sector seems poised for regeneration and growth. The partnership can be an integral part of the invention of a new future for the industry.

What's next for the industry

How (and how quickly) the sector develops is a question of leadership, intention and the collaborative partnerships formulated for collective impact. That leadership will have to come from actors on the ground in Sierra Leone who see the big picture, spot the opportunities and act to seize them. Existing FaTASL members should prioritise strengthening their business association; they should also pursue aggressive outreach to potential members to expand their influence and the potential for valuable collective action. FCC will also have a key role to play to support the emergence of FaTASL as an effective actor, and particularly, to promote the growth of the MiSL brand internationally.

For all those stakeholders interested in supporting the development of Sierra Leone's fabrics and fashion industry further, several broad recommendations follow:

- Strengthen supply chains (both nationally within Sierra Leone and extending to the West African subregion), starting with sustainability and sourcing of raw materials (cotton, raffia). These efforts will likely include support for compliance with the most relevant global voluntary standards (organic, fair trade and in relation to traceability).
- Improve artisanal productivity with better technology (for example, machinery for larger looms, extraction of sustainable and organic dyes), all without losing authentic traditions and updated skills.
- Support innovation around inputs, such as dyes to bring traditional materials into the modern age and ensure they are robust and resilient.
- Support the vocational education regulatory authorities, in collaboration with businesses and commercial training schools, to identify the essential core skills required of key occupations (such as tailors) and to agree standardised certification pathways and training design.
- Provide support to businesses to improve specialist skills in relation to design, tailoring, business management, entrepreneurship and supply chain management.
- Provide targeted support and technical assistance for promising firms with high-growth potential to overcome specific barriers, whether internal or within the wider sector.
- Promote greater exposure for Sierra Leonean firms offering a combination of authentic fabrics and fashion designs that burnish the MiSL brand proposition and that can meet market demand on niche platforms, and at trade fairs and fashion shows.
- Strive for sector governance improvements, supporting the association to bring together credible actors across the supply chain to advance the common interests of business stakeholders in the context of the opportunities the industry needs to exploit for export growth and domestic expansion.
- Support the new business association to address policy constraints holding back growth in the form of public-private dialogue and technical assistance, to devise workable solutions and innovative policies and regulations that can stimulate the high-productivity, competitive growth of the industry.

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Appendix 1 List of businesses interviewed

| Name of business | Description |
|---------------------------|--|
| BijouCreates | BijouCreates is a UK-based company that operates exclusively through its own e-commerce platform. It does most of its manufacturing in Sierra Leone, with some handmade design work in the UK. The company integrates West African design of accessories such as laptop sleeves with a modern, minimalist aesthetic look, capturing sales from a diverse client base including African diaspora consumers. |
| Bivamiks | Bivamiks is a full-service, high-end fashion design business that uses country cloth, batik wax prints and <i>gara</i> tie-dye fabrics (which it sources for clients) to develop bespoke pieces. |
| CountryCloth.org | CountryCloth.org promotes weaving in Sierra Leone by creating opportunities for economically disadvantaged weavers through workshops and sales. The organisation creates and supports a safe and healthy environment for weavers, by providing them with flexible and healthier working conditions with more control over their work. |
| Fashion One | Fashion One is a medium capacity, high-end tailoring firm sewing uniforms in bulk for firms (e.g. security companies, hotels), ready-to-wear fashion outfits off-the-shelf, and bespoke tailored clothing items for wedding parties as well as individual clients. |
| Fashion Industry Insiders | Fashion Industry Insiders is a fashion and lifestyle accelerator platform that aims to equip, educate and empower the next generation of fashion influencers in creative and innovative ways. |
| Hen Nyandei | Hen Nyandei produces fashion and accessories aimed at satisfying style-conscious women and men seeking African-inspired fabrics and fashion. |
| Izelia | Izelia specialises in <i>gara</i> tie-dye and has a textile and garment factory in Freetown, as well as a shop in the UK. The business has a keen interest in creating new, non-chemical textile dyes. |
| Labrum London | Labrum London is a modern-day menswear brand that fuses British tailoring with West African design. The business is based in East London, though the founder and creative director spent his formative years in Sierra Leone. Labrum offers its collections for purchase online, as well as a fully bespoke tailoring service from its studio. The firm's tagline is 'Designed by an immigrant'. |
| Madame Wokie | Madame Wokie specialises in producing African-inspired ready-to-wear and bespoke tailoring, working also with traditional artisans. The brand has expanded to fashion consultancy, bags, jewellery, footwear and fabrics and is now well established beyond Sierra Leone, featuring in various international fashion shows and magazines. |
| NenehGaleh Gara | NenehGaleh Gara focuses on fabric design and production. The company partners with a tailor to meet clients' orders for wedding outfits (called ' <i>ashobi</i> ', in which family and friends of the marrying couple will wear outfits from identical cloth but finished according to individual preferences). |
| Pangea | One part of Pangea focuses on soft furnishings, but it is also a carpentry business. The soft furnishings business uses locally designed fabrics, with a strong emphasis on circularity and minimalism of waste. |
| Vivid Emporium | Vivid Emporium specialises in off-the-shelf, ready-to-wear gowns in batik and tie-dye <i>gara</i> , sold mainly to African American customers who favour the Afrocentric look. The company also supplies bedding, window curtains, etc. in the USA, as well as batik and tie-dye fabrics to other designers. |