

Protecting Small & Medium Producers of Bangladeshi Boutique Fashion: The Need for a Leadership Role of Industry Associations

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Abstract

The story of boutique fashion industry of Bangladesh is a unique one. Carved with thousands of years of cultural heritage, craftsmanship of cottage artisans and Small and Medium Enterprises (SME), depiction of local festivals and struggle for freedom, this industry has the true potential to go global. However, the industry is yet to be declared and prioritized as a thrust sector by the government. The study utilizes the concepts of 'Leadership', 'Business Ecosystem' and 'Role of Associations' combined with Triple Triangle Framework (TTF) of SME competitiveness priorities to identify the key strategic areas that boutique fashion industry representatives need to focus on with due leadership role. The study is based on extensive literature review, experience survey and top-level depth interviews. Based on the findings of this study, the representatives of boutique fashion would be able to craft a strategic approach to address the prioritization issue and bring the industry at the forefront of development discussions for a future Bangladesh.

Keywords: SME, Boutique, Fashion, Ecosystem, Association, Leadership, Thrust Sector, Bangladesh

1. Introduction

1.1 Background of The Study

The boutique fashion Industry of Bangladesh is engraved with thousands of years of stories about our heritage, cultural festivals, art and crafts of our rural artisans like Muslin, Jamdani and Nakshikantha and our struggle as a nation for language and freedom. While the 'industry' has true potential to represent Bangladesh in the global arena, it is yet to be declared as a 'thrust sector' by the government of Bangladesh and all key institutions of the government apparatus deprioritize the industry due to resource constraints. The Bangladesh government has been in discussion with Industry leaders since as early as 2010 to declare the flourishing boutique business as a new 'thrust sector' to help expansion of the industry which employs a huge number of our women labour force (BDNews24.com 2010). However, the sector is yet to be declared as a formal 'Industry', per Mr. Azharul Haque Azad the president of Fashion Entrepreneurs Association of Bangladesh (FEAB), one of the key associations of the industry that is working closely with the Ministry of Commerce of Bangladesh in this area.

The key realization during the research process was that the associations of direct Industry participants need to play key leadership role to advance inclusive growth opportunities for Small and Medium Enterprises in the boutique fashion industry. This article mainly aims to address the key areas of strategic thrust that the leaders these associations need to focus on related to competitiveness of the industry utilizing the concepts of 'Leadership', 'Business Ecosystem' and 'Role of Associations' combined with Triple Triangle Framework (TTF) of SME competitiveness priorities as proposed by the co-author of this paper, Sheikh Morshed Jahan (2008).

1.2 Objective

1.2.1 General Objective

- To develop a detailed understanding regarding key strategic areas that boutique fashion industry representatives need to focus on and their leadership role.

1.2.2 Specific Objectives

- Understand the status of Key direct industry associations to support the inclusive growth agenda in the boutique fashion industry in key strategic areas.
- Develop a basic approach of interventions that the direct industry associations need to focus on as leaders to drive the industry as a thrust sector.

1.3 Methodology

This article is the second one in a series of two articles by the authors based on research that is exploratory in nature and has been done through extensive literature review, experience survey and depth interviews of Key industry experts. While the first article 'A Study on Preparedness of Key Institutions to Advance Inclusive Growth for Small & Medium Producers of The Boutique Fashion Industry in Bangladesh' published in The International Institute for Science, Technology and Education (IISTE) Journal of Developing Country Studies, ISSN 2224-607X (Paper), ISSN 2225-0565 (Online), Vol.7, No.1, 2017; utilized the Triple Triangle Framework (TTF) to summarize SME competitiveness priorities along nine dimensions of three TTF domains and

institutional preparedness for four relevant direct industry associations and four government organizations, this article focuses on leadership role of direct ecosystem associations to protect small & medium producers in boutique fashion industry of Bangladesh given the fact that the industry is not a thrust sector and yet to be declared as an 'industry'. As primary stakeholder, four (4) national level industry associations have a strong role to play in the process of protecting the SME producers who are the lifeblood of this industry. The research process is explained below.

1.3.1 Literature Review (Phase I)

In the first phase, researcher has undertaken exploratory research to gain better understanding of the dimensions of the boutique fashion industry, key institutions and the need for leadership. This phase also helped identify the key areas where direct industry associations need to intervene to support the industry. The research was carried out by going through secondary research materials which have been referenced and detailed in multiple sections of the report.

1.3.2 Experience Survey (Phase II)

Researcher also had preliminary discussions with experts working or ex-workers of the Industry. Experts involved in this phase were brand managers, CXOs, consumers and financial institution representatives. A good understanding of all the factors and variables and identification of possible information sources i.e. key institutions was a vital requirement to develop the base of the research.

1.3.3 Depth Interview (Phase III)

The researcher then interviewed stakeholders/ representatives of all relevant institutions i.e. Fashion Entrepreneurs Association of Bangladesh (FEAB), Fashion Designer Council of Bangladesh (FDCB), National Craft Council of Bangladesh (NCCB), Small and Medium Enterprises Foundation (SMEF), Bangladesh Small & Cottage Industries Corporation (BSCIC), Export Promotion Bureau (EPB), Bangladesh Handicrafts Manufacturers and Exporters Association (BANGLACRAFT) and Bangladesh Bank (BB). Structured Interview based on open-ended questions was tailored to the different informants and utilizing findings from previous interviews. Each interview lasted for 90 minutes or so. In-depth interviews were used because idea was to gain access to unpublished experience based information and detailed probing of the informants will be required.

1.3.4 Preparing the Approach of Intervention (Phase IV)

At the final stage of the research, a qualitative approach of strategic interventions has been developed based on qualitative method and relied on views of select Industry experts and Policymakers combined with researchers' experience and understanding developed during the entire study.

1.4 Scope of Research

The scope of this research was limited to Boutique Fashion industry namely Handcrafted apparels where definition is limited to boutique male and female ethnic wear i.e. Salwar, Kurta, Kamiz, Panjabi, Orna and wearable accessories. The geographic scope was limited to Key National Institutions only.

1.5 Limitations

Issues related to formal data availability on the sector, reliability of information from different organizations and experts due to bias and qualitative nature of the study that required the researchers to compile expert views and reach a concrete conclusion based on personal experience are some of the limitations of the study.

2. Literature Review

2.1 Leadership

Leadership is a concept which is still vague. Even though a lot has been talked about leadership but the word is not very well defined. In fact, there is a lot of debate regarding what is good leadership and this confusion arises because depending on context, leadership has been defined differently for different purpose. One common misconception is that in order to be a leader, one must be the CEO or member of the board of directors but there are lot of evidence which shows that leadership can be influenced or exercised at any level in an organization (Bennis, 2007). However, leadership and management are not synonymous, there is a distinctive difference between the two and there is a lot of confusion regarding these two concept in the society. Leadership is all about envisioning the goal and strategy whereas management is more about executing the strategy (Kirkpatrick & Locke, 1991). The 5 common traits in leadership are: Providing direction, Inspiring others, Team building, Leading by example and Embrace acceptability (Thomas, 2004). Even though the first two coincide with both management as well as leadership but the next three depends a lot on the personal characteristics of an individual and thus cannot be mimicked by anyone. In broad strokes, leadership can be categorized in two primary form: Enabling and Inspirational (Leigh & Meinard, 2003). Enabling leadership is primarily practiced by management for example motivating team, being the mentor and facilitating day to day business operation. The latter category of leadership depends heavily on the personality of the leader and this sort of leaders are the ones who exercise radical initiatives, generate likeability and integrity among followers. According to Khema, et al. 2007, A good

leader should: Know the organization in detail, including the needs and opinions of members; Understand the political, social and legal environment that affects the members; Identify and access external support that the organization needs; Be one step ahead of events by good planning, but also act quickly in emergencies; Build a consensus within the organization by articulating a clear vision of its future; Be good at solving problems and taking decisions; Communicate well and motivate members and staff; Take criticism and learn from it; and Be easily accessible to the members.

2.2 *Business Ecosystem*

The concept of Business ecosystem is derived from the concept of Biological ecosystem. According to The New Shorter Oxford English Dictionary (1993) biological ecosystem is “a system of organisms occupying a habitat, together with those aspects of the physical environment with which they interact” (Peltoniemi & Vuori 2004). In the same article, Industrial Ecosystem is discussed where it is identified that the concept was originally presented in Scientific American by Frosch and Gallopoulos (1989). The basic idea is environmental protection by the means of nature. Industrial ecosystem is an analogue of biological ecosystem, where all material is recycled infinitely and efficiently. According to Rothschild (1990, xi) and Mitleton-Kelly (2003, 23), organizations are always co-evolving within a social ecosystem. In Mitleton-Kelly’s social ecosystem “each organisation is a fully participating agent which both influences and is influenced by the social ecosystem made up of all related businesses, consumers, and suppliers, as well as economic, cultural, and legal institutions.” (Mitleton-Kelly 2003, 30). Moore defines business ecosystem as “an economic community supported by a foundation of interacting organizations and individuals – the organisms of the business world.” According to Moore, a business ecosystem includes customers, lead producers, competitors, and other stakeholders. The key to a business ecosystem are leadership companies, “the keystone species”, who have a strong influence over the co-evolutionary processes. Moore states that these are just metaphors which can clarify certain issues and help understanding them. (Moore 1996, 9, 25, 26). According to Iansiti and Levien (2004, 46) there are three critical success factors of a business ecosystem. First, productivity is a very basic factor which, at some point, will define the success of any kind of business. Second, any business ecosystem should be robust. Robustness in natural ecosystems means capabilities of surviving when shocks from inside or outside the ecosystem threaten to destroy it. In business life, this means drawing competitive advantage from many sources and having the ability to transform when the environment changes. Third, a business ecosystem should have the ability to create niches and opportunities for new firms. This requires a change in attitudes from protectionist to cooperative. According to Power and Jerjian’s thinking, there are four stakeholders to any enterprise, which should be considered: communities of shareholders, employees, businesses and customers (2001, 18). Power and Jerjian produce one example about this phenomenon, namely a coral reef, where the structure for the whole community is created by coral polyps. In the same way business ecosystem is often built on one single company, who is highly connected. (Power & Jerjian 2001, 289). Lewin and Regine (1999, 207) for their part state that a business ecosystem is a network of companies each occupying a place on its own landscape of possibilities, and each landscape being coupled to many others: those of competitors, collaborators, and complementors. Due to interconnectedness, changes in the landscape of one company cause changes in the landscapes of other members of the business ecosystem. They also recommend for companies in complex environments, where co-opetition is present, to base their strategy on co-evolution (Lewin & Regine 1999, 208).

2.3 *Association*

An association of people or companies in a business or trade, organized to promote their common interests. Every industry works together to develop policies so that the industry can get benefitted. A thoughtful examination of trade associations and business societies and their profound influence upon contemporary American society. The author analyses the influence upon government and public of industry, trade, business, and professional associations as well as chambers of commerce. He emphasizes the value of research performed for the national organizations, points to areas in which special contributions have been made, and explores the fields in which more remains to be done (Bradley, 1965).

Critical roles of Trade Bodies and their Associations are:

- **Public & Private Sector partnership & engagement:** These bodies give clear direction regarding what should be the role of Public sector and Private sector for growth of the industry.
- **Market Coordination:** Trade bodies coordinate activities of their members to keep track of input and output of resources within the industry to understand trend and to control the overall transaction value. Collective control over output markets is enhanced when business associations collect and disseminate information on changing market trends and/or help market their members’ products.
- **Skill Upgrading:** These associations work with industry actors to train the industry participants: suppliers, employee, workers, and buyers etc. to develop their individual capacity so that the industry gets benefitted.
- **Research & Development:** Collective effort in research & development enhances knowledge of every

member within an association and this embraces more informed choices and product innovation.

- Strategic planning: The trade bodies anticipate future trends and take necessary or corrective steps to reach a future goal for overall benefit of trade bodies.

The experience of small business associations in several countries shows that: Leaders that are too close to the government may not safeguard the autonomy of the association. Where the expertise of Government staff is needed, it is better that they act as advisers either on a committee or temporarily seconded to the association. Some leaders become too powerful and the association becomes too dependent on them. It is necessary that responsibilities are shared and leadership potential of others is encouraged. Influential people such as local traditional leaders do not necessarily have to be the leaders of the association. They can be asked to play a moral or a dignified role and may only be involved in major events or ceremonies. (Khema, *et al.*, 2007).

2.4 Success Cases of Few Relevant Associations

The Bangladesh Garment Manufacturers and Exporters Association (BGMEA) is one of the largest trade associations in the country representing the readymade garment industry, particularly the woven garments, knitwear and sweater sub-sectors with equal importance. Starting its journey in 1983 today BGMEA takes care of an industry that is at the backbone of Bangladesh's economy. Since the inception, BGMEA is dedicated to promote and facilitate the apparel industry through policy advocacy to the government, services to members, ensuring workers' rights and social compliance at factories. (BGMEA, Website).

Starting its journey in 1996, Bangladesh Knitwear Manufacturers and Exporters Association (BKMEA) is the apex trade body to represent solely the Knitwear Sector of Bangladesh. BKMEA adheres to innovation and creativity so that the sector based policy-making process becomes realistically and strategically perfect and gives off the result that expedites its developmental phase. Nowadays, BKMEA is playing crucial role in policy-making process like formulation and fixation of National Export Policy, Import Policy, Import Policy Acts, Textile Policy, Industrial Policy, Fifth Year Policy, Labour Law etc. also framing sector-support rules, market expansion program, research initiatives, productivity campaign, making green and environmentally-friendly industrial belt.

There are other trade organization across the world which are working to uplift the overall benefit of the industry. The American Apparel & Footwear Association (AAFA) is the national trade association representing apparel, footwear and other sewn products companies, and their suppliers, which compete in the global market. Representing more than 1,000 world famous name brands, AAFA is the trusted public policy and political voice of the apparel and footwear industry, its management and shareholders, its four million U.S. workers, and its contribution of \$361 billion in annual U.S. retail sales.

California Fashion Association is an association of all business houses operating in California to provide a platform for networking dialogue among industry stakeholders to address critical policy issues. They also work together to work on issues like efficient sourcing, setting industry standards.

2.5 The Triple Triangle Framework of Competitiveness

As highlighted in the first article related to this research, The Triple Triangle Framework developed by Sheikh Morshed Jahan (2008), consists of three triangles that summarize the factors that affect business competitiveness at different levels. The inner triangle – with each of the three sides symbolizing either capacity, or capital or culture – explains the internal, largely controllable dynamics of firms. The middle triangle – with each of its three sides symbolizing either a customer, or a competitor or a collaborator – describes the immediate, industry-level context in which firms work. The outer triangle – with each of the three sides symbolizing either technology, or state or society and global forces – presents the macro environment, a largely non-controllable setting in which firms must operate (Jahan, 2008). Following is the visual representation of the TTF Competitiveness Model.



Figure 1: The Triple Triangle Framework

3. Triple Triangle Framework and Key Institutions of Boutique Fashion

3.1 The TTF Factors that Need to be Addressed

During the author's experience survey and depth-interview all the experts highlighted importance of different issues for the Boutique Fashion Industry. Based on their feedback, the key issues that we can see for the industry related to the three dimensions were detailed out in the first article (Siddique and Jahan, 2016). Here is a summary of those issue. The list is not sequenced by any form of prioritization of the experts and is just a compilation.

Table 2: TTF Dimensions and Status of Boutique Fashion Industry for SMEs

TTF Dimension	Factors	Status for SME Producers
Capacity	1. Production Capacity & Skill	The MSME producers do not have sufficient capacity and production skill to meet seasonal demands let alone even attempt for any export or global opportunities. Also, due to high employee turnover, industry producers are not very keen to take up skill development activities since they think of it as cost rather than investment.
	2. Entrepreneurial Skill	MSME producers lack proper Business mindset, planning and future orientation. Most producers themselves do not look at the business as something they feel proud to pass on to their future generations. Due to profitability issues, rising cost and manual nature of the industry, they themselves want their children to try something different.
	3. Understanding of Fashion Trends	Most MSME Producers do not focus on understanding trends. They are entirely/ mostly dependent on big retailers to provide them understanding of Bangladeshi Heritage, Fusion Trends, Motif etc. While the big retailers/ large producers recruit from reputed Fashion Institutes, the MSME producers rely on their own self-learned expertise.
	4. Marketing and Market Linkage Skills	MSME producers lack the initiative to engage in Market linkage as more than two-thirds of the producers are dedicated to large and medium retailers and they rely on the retailers for financing in the form of advance payment. The few producers that are generally open to Marketing move towards becoming a retailer themselves by trying to learn from experience rather than formal training or mentorship.
	5. Capability to manage financiers	MSME producers are reluctant to learn the process of official financial and have a general tendency to blaming the process as troublesome. Since, most of these producers start home-based operation, they rely on retailers for advance and the convenience of Loan Shark due to personal relations despite high interest rate.
Culture	6. Individualistic vs. Entrepreneurial approach	Issues related to entrepreneurial skill also lead to an individualistic approach to running the business among MSME producers. With focus on cost minimization, producers are reluctant to hire indirect support system people and even proper fashion designers or even expert artisans. Due to lack of trust and win-lose approach to run the business, they tend to rely on family relatives rather than expert employees.

TTF Dimension	Factors	Status for SME Producers
	7. Acceptability towards change	The producers tend to be in inertia against ever changing fashion trends. While, some of the big and medium retailers try to motivate them to work on new style, trends to create fusion of heritage and modern design using different motifs, the need for re-learning and re-training unskilled artisans, lead to negativity towards change.
	8. Group Collaboration & Collective Bargaining	The issue of trust is seen among MSME competitors. issues related to copy products, design pilfer and price war among producers lead to low group collaboration Among producers themselves. While dedicated producers of large/ medium retailers maintain good relations with each other, the competitive nature of producers themselves are clearly existent to acquire new retailer as clients.
Capital	9. Sources of Fund & Awareness	Like the issue of capability to manage financiers, another issue is the understanding of different source of funds and awareness regarding them. Most MSMSE producers are not aware of readily available collateral-free SME Loan facilities from Banks and MFIs as mandated by Bangladesh Bank.
	10. Cost Model for Financing	The cost model of financing is not known in detail by most producers. Even though taking advance from retailers puts them at a profit disadvantage and loan sharks usually charge very high interest rate, formal process of EMI, diligent documentation requirement, and other requirements make producers shy away from MFIs and Banks. This is simply due to the natural convenience that they get when they do not generally need to meet specific time schedule and can adjust with the lender due to personal relationship.
	11. Process of Funding & Difficulties	In most cases, producers do not try to gather knowledge regarding the process of formal banking or MFI Loan. According to industry experts, there are issues on both sides. While a producer needs to have easy process, banks also need to do their due diligence and in many cases, the entrepreneurs do not have the right business plan, entrepreneurial approach and the convincing skills to get the loan.
Competition	12. Machine-based Textile/ Knit/ Woven Products	The producers for the Boutique fashion industry face huge competition from other forms of textile and knit and woven products. This does not only entail the demand in the market, but also competition for investments. Growth opportunities in the export of home textiles and local demand for textile products are firmly shaping the future of investment in the textile sector of Bangladesh and the MSME producers for boutique fashion industry must compete for this investment as well.
	13. Foreign Imported Products / Raw Materials	In import of key raw materials had increased by about 5-10 per cent last year despite a comparatively slow growth rate in RMG export which saw a 4.08 per cent export growth in the last fiscal year, 2014-15. Thus, MSME producers are losing out due to the availability of imported raw materials, which are marked at a higher rank because of perceived quality value.
	14. Scale and Skill of Operation for Big Boutiques	The big boutiques are regularly being exposed to training and workshops, not only at a local level, but also at a global level as opposed to the MSME products to the boutique industry. This also led to the big boutiques replacing the producers with their own resources to reduce the cost.
Customer Market Linkage	15. Access to Market	The MSME producers have very limited access to market as the lack of knowledge of the market holds them back. There's no standardized platform where the producers can learn about the interested buyers or even showcase their products to them. There is also a lack of initiative and most of them have a heavy reliance on specific retailers.

TTF Dimension	Factors	Status for SME Producers
	16. Forward Integration	There's a lack of initiatives for forward integration as the MSME producers lack necessary funding or capacity to collaborate. There's a general lack of trust within the different partners in the industry, and the producers will always want to find the best deals than sticking to a permanent solution.
	17. Demand Pattern	The seasonality factor place a big role in changes in the demand pattern. The lack of industry-wide planning during seasonal events like Pahela Boishakh, Bijoy Dibosh, etc. has only led to continuous shortage and lack of quality designs.
	18. Potential of Global Opportunity	Due to the increased globalization, more and more global trade shows are happening in consideration of the multi-cultural approach. There is a potential of global opportunity for MSME producers, however the lack of knowledge about these opportunities and capability to produce for global markets are holding them back.
Collaborator	19. Interaction with and among Big Boutiques	There is no proper flow of information within the producers and the Big Boutiques. For most of the cases, the Big Boutiques exercise more power on these producers and do not consider them as important partners in the value chain.
	20. Interaction with and among MFI & Development Programs	Long-term relationships with MFI are hardly ever built by the MSME producers. The handful no. of projects that are being undertaken are usually by bigger players like BRAC. However, there is a reluctance from MSME producers as well to take funding for capacity building as most lack the entrepreneurial spirit.
	21. Interaction with and among Government Institutions	The trainings and workshops held by BSCIC and EPB are usually one-off and since the MSME producers face a huge turn-over rate, the long-term impact from these projects can hardly be measured. There's also a lack of effort for these producers from SME Foundation as this is not a thrust sector.
	22. Interaction with and among Training Institutes etc.	There is almost no interaction among the training institutes and MSME producers as the producers are reluctant to train their employees because of the high turnover rate.
Cross-Border (Globalization and International Forces)	23. Access of consumers to global trends	With increase of consumer laws that exercise the consumers' right to information, there has been a shift in consumer behaviour globally. Also, a digital world means the consumers are being more aware of fashion trends in other countries, which are giving unexpected shifts in demand.
	24. Global brands' interest in Bangladesh Market	The top tier Global fashion giants have recently started to collaborate with the RMG industry for production. This has brought in more exposure to global fashion within the industry, and with building the right capacity, the industry can handle this in a well-rounded manner.
	25. Big companies have better access	The big companies have the capacity to employ global technology as they can get necessary investments. On the other hand, the MSME producers do not have the funding or the exposure to the global trends.
	26. Potential for Global Footprint	The global fashion industry is looking for varieties in design and product materials to satisfy the growing demand of consumers. There is an increase in the number of global trade shows and workshops and it is becoming vitally important to proactively seek for such opportunities.
Creativity (Technology)	27. Innovation	The rate of innovation nowadays has been the highest than ever before across all industries, and the fashion industry is no different. There have been innovations in business models, production processes, etc. that can sufficiently bring up the efficiency level and consumer satisfaction.
	28. Technology Incorporation	The big players in the market are bringing in machineries from abroad to meet the requirements of the buyers. Global B2B platforms have made the communication easier among the partners.

TTF Dimension	Factors	Status for SME Producers
	29. Trend-setting Designs	The consumers are now seeking more and more value from the products they are buying, and this has kept the fashion industry on the edge for coming up with new designs every single day. They are now looking for inspirations from other cultures and mixing designs to produce high breed of designs for products.
Country (State Society) &	30. Sector Recognition	The potential; contribution of the industry in the GDP is undeniable and more and more efforts need to be taken by the government to help the firms operating in the industry but the industry is yet to be declared as a thrust sector and thus is not prioritized by key government institutions.
	31. SME Protection	In recent times, there have been policies by the Bangladesh Bank where they have introduced several schemes and programmes to flourish and expand SME Enterprises. Refinance scheme funded by Bangladesh Bank, IDA and ADB has been facilitated for the development of SME Sector. Even with all these, still there are no laws/ acts in place for SME Protection.
	32. Fair Competition	The power in the market lies with the big players while de-benefitting the MSME players who cannot compete with them in terms of capacity and output. Policies need to be reformed to enable fair competition so that MSME firms are encouraged to come forward and maximize their growth potential.
	33. Export Promotion	There should be an industry-wide effort to promote export in the global market to compete with the other players like China, Vietnam, and India. All the players from the value-chain should be facilitated to contribute in the industry strategies for promotion of the sector.
	34. Promoting Unique Features of The Industry	It is increasingly becoming vitally important to identify the elements that make up the USP for the industry. Features that are culturally unique to us like Nakshikantha motifs should be highlighted in our proposition when we are approaching the global market.

Source: Authors

3.2 The Four Key Direct Industry Associations

There are four nationally present Direct industry associations that are mandated to work towards developing the boutique industry. While, the activities and leadership are yet to have the right scale, Fashion Entrepreneurs Association of Bangladesh (FEAB) is a nascent organization that started its journey on 22 March, 2014 as the main representative body of the fashion industry in bargaining various industry-related issues with the government. The objective of FEAB is to establish fashion industry as a priority sector and the support of the government through friendly policy that can help the industry in contributing to the economy in an organized manner (BD Chronicle 2014). Launched on February 19, 2014, The Fashion Design Council of Bangladesh seeks to promote Bangladeshi culture and fashion internationally, creating a market for our "Desi" products. It also aims to set up a research and resource centre that will archive old fashion cultures and traditions of Bangladesh and act as a guideline for up and coming designers (FDCB Official Facebook Page 2016). According to top leaders of FDCB, the council intends to work as a think-tank for the Boutique Fashion industry and promote the uniqueness of Bangladeshi Fashion to the world. Headed by one of the pioneering experts of the Fashion Industry, Chandra Shekhar Saha, the National Crafts Council of Bangladesh (NCCB) since 1985 has been involved in craft development and promotion through research, documentation and a range of support services for craftspeople. The Crafts Council's objectives have been to discover the lost craftsmanship of Bangladesh, to revive traditional crafts, to ensure the purity of craft forms and to recognize the lifetime contribution of artisans who have not only kept traditional crafts alive but have transferred them successfully to the next generation. The Handicrafts manufacturers & exporters had formed a national association in 1979 as Bangladesh Handicrafts Manufacturers and Exporters Association, in short "BANGLACRAFT". The Association was mainly formed with the Manufacturers, Exporters Traders, Producers, Designers, Promoters and Suppliers of handicrafts items throughout the country. The association works to promote and protect the interest of all persons engaged in the manufacture, export, production, supply, designing and trade in handicraft (Banglacraft 2010).

4. Role of Industry Associations and Intervention Approach

4.1 The Complimentary Role of Four Key Players

The research findings from experience survey and depth interview shows a complimentary presence of all four national institutions that are working for this industry. We can clearly see that key mandates of these institutions can be summarized in a way that can future-proof the industry. FEAB is working towards addressing key industry issues. FDCB is present to promote heritage of boutique fashion both locally and globally. NCCB's endeavour is to preserve the industry through research and recognition and BANGLACRAFT can facilitate the export process. All they need is proper collaboration and a combined vision based intervention approach to address the 34 factors across 9 dimensions gradually.

4.2 The Grouping of Factors under Intervention Areas

Based on the views of relevant industry experts and policymakers combined with experience gathered during the research process, the 34 (thirty-four) factors can be combined under 6 (six) broad areas of interventions. The grouping is as follows:

Table 3: Grouping of TTF Factors under Intervention Areas

Broad Intervention Area	TTF Factors
Value Chain & Industry Facelift	4. Marketing and Market Linkage Skills
	8. Group Collaboration & Collective Bargaining
	12. Machine-based Textile/ Knit/ Woven Products
	13. Foreign Imported Products / Raw Materials
	15. Access to Market
	16. Forward Integration
	19. Interaction with and among Big Boutiques
SME Protection & Policy Challenges	20. Interaction with and among MFI & Development Programs
	21. Interaction with and among Government Institutions
	30. Sector Recognition
	31. SME Protection
	32. Fair Competition
Functional Skills and Entrepreneurial Approach	1. Production Capacity & Skill
	2. Entrepreneurial Skill
	6. Individualistic vs. Entrepreneurial approach
	7. Acceptability towards change
	22. Interaction with and among Training Institutes etc.
Access & Capability to Manage Finance	5. Capability to manage financiers
	9. Sources of Fund & Awareness
	10. Cost Model for Financing
	11. Process of Funding & Difficulties
Innovation and Consumer Trends	3. Understanding of Fashion Trends
	14. Scale and Skill of Operation for Big Boutiques
	17. Demand Pattern
	23. Access of consumers to global trends
	24. Global brands' interest in Bangladesh Market
	27. Innovation
	28. Technology Incorporation
	29. Trend-setting Designs
Globalization and Industry Promotion	18. Potential of Global Opportunity
	25. Big companies have better access
	26. Potential for Global Footprint
	33. Export Promotion
	34. Promoting Unique Features of The Industry

Source: Authors

4.3 The Intervention Approach

Based on the findings of the research and basic understanding of the factors identified following table summarizes the six intervention areas, their related objectives and identifies the key institution(s) that needs to play primary and support roles. The six key intervention areas i.e. Value Chain & Industry Facelift, SME

Protection & Policy Challenges, Functional Skills and Entrepreneurial Approach, Access & Capability to Manage Finance, Innovation and Consumer Trends and Globalization and Industry Promotion have associated multiple objectives that the industry needs to achieve in order to protect the MSME producers and future-proof the industry.

Table 4: Intervention Areas and Key Institutions

Intervention Area	Intervention Objectives	Primary Institution(s)	Support Institution(s)
1. Value Chain & Industry Facelift	1.a A win-win mindset among competitors i.e. both producers and retailers to generate both financial and emotional profitability for all actors so that MSME producers do not feel exploited and see future for generations in this industry.	FEAB	NCCB
	1.b Collaborative forward and backward integration among industry operators to generate pride about the industry through promoting high-value products using heritage motifs and fusions.	FEAB	FDCB
2. SME Protection & Policy Challenges	2.a Research and Collaboration with key policy making and collaborative government institutions to ensure fast declaration of the industry as ‘thrust sector’ to be on the priority list of government development agenda.	FEAB	NCCB
	2.b Develop necessary MSME protection acts/ laws or temporary initiatives to support MSMEs against large scale players of the immediate industry and competing industries from a heritage perspective.	FEAB	NCCB FDCB
	2.c Deploy development programmes in key clusters of the Boutique fashion MSME producers with support of Government and NGOs.	FEAB	FDCB
3. Functional Skills and Entrepreneurial Approach	3.a Develop and deploy platform for reviving heritage motifs and materials along with capacity and skill development training curriculum for both producers (entrepreneurs) and artisans based on systematic research and heritage revival so that value-addition can be ensured in the industry.	NCCB	FEAB
	3.b Deploy large scale entrepreneurial approach training for MSME producers so that acceptability to change, corporate culture can be cultivated.	FEAB	FDCB
	3.c Create a national platform for recognizing artisans, producers and retailer to promote industry both nationally and globally.	NCCB	FEAB FDCB
4. Access & Capability to Manage Finance	4.a Create national awareness regarding already available formal source of Financing for MSMEs and deploy training programmes to create capability to convince financiers.	FEAB	FDCB

Intervention Area	Intervention Objectives	Primary Institution(s)	Support Institution(s)
	4.b Create an amicable environment and smoothness for loans and facilities liaising with Banks and Non-Bank Financial Institutions to promote positive vibe towards Boutique Fashion compared to other industries.	FEAB	NCCB
5. Innovation and Consumer Trends	5.a Deploy continuous research related to consumer trends, demand patterns, global competition, heritage styles, Fusion Trends, Motifs etc.	NCCB	FEAB BANGLACRAFT
	5.b Create platforms/ publications/ training programmes and national exposure for MSME producers to be updated with the research outcomes and trends.	FDCB	FEAB
	5.c Promote and deploy new technologies associated with the industry i.e. power-loom, IT incorporation and Digital facilities for production, promotion and p	FEAB	NCCB
6. Globalization and Industry Promotion	6.a Explore potential global opportunities beyond just ethnic markets and understand specific requirements of other cultures and countries to develop products for those markets specifically.	BANGLACRAFT	FEAB
	6.b Organize and participate in local and cross-border fashion shows/ fairs and other relevant initiatives to promote Bangladeshi Boutique fashion's present and past to create USP based on our own heritage.	FDCB	BANGLACRAFT FEAB

Source: Authors

5. Conclusion

The four key national industry associations of the Boutique Fashion ecosystem of Bangladesh must play strong leadership roles to future-proof the industry. Based on the findings of this study, the representatives of Boutique Fashion need to craft a strategic approach to address the prioritization issue and bring the industry at the forefront of development discussions for a future Bangladesh. The six identified intervention areas with fifteen intervention objectives should be of top priority for the associations. Given the fact that survival of the entire industry ecosystem is dependent on the small and medium producers being protected and passing the torch of entrepreneurship to their future generations, the associations need to collaborate and work together strongly. The fact that all four associations are mandated to serve four focus areas of the industry, their combined effort at a larger scale can truly benefit the industry.

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