

STAKEHOLDER ECOSYSTEM  
MAPPING –  
Update January 17th 2020.


# 1.1 THE ECOSYSTEM APPROACH


The garment and footwear sector is global and complex. Developing a successful traceability standard requires **engagement, buy-in, and cooperation** from many relevant actors and stakeholders within the system, both at **global and national level**. We have mapped and identified a) the **macrosystem** (the types of organisations and what they do, what part in the ecosystem they play); and the **countries of most-importance** (where the majority of goods are produced), to support the identification of key partners.


## Phase 1: Map the macro ecosystem

We have mapped the overall macro ecosystem of the garment and footwear sector. The chart shows stakeholder groups, organised into quadrants:

- Those **producing garment and footwear** across all tiers  
Those providing **services for the administration of goods** within the value chain, such as freight forwarders
- **Societal organisations** including campaign groups, academia, donors
- **Government**, regulators, intergovernmental bodies

 Agree the quadrant diagram and nomenclature of stakeholder groups.


 Agree which of the stakeholder groups are critical to engage with in relation to traceability and production of garments and footwear versus those which we can inform and keep updated on the project.


 Rank stakeholders according to influence within each of the quadrants.

## Phase 2: Map countries of most-importance

We mapped the upper tranche of countries within the garment and footwear value chain, using 2019 World Trade Organisation figures on exporting and importing textiles; and exporting clothing.

We included additional countries that are not in the upper tranche but are emerging economies and / or those countries that have stated traceability aims within their textile industry visions, national action plans etc.


 Agree which countries are vital to engage with for the success of the project.


 Pending further information from the Leather experts on critical leather importing and exporting countries outside EU region.

## Phase 3: Drill down

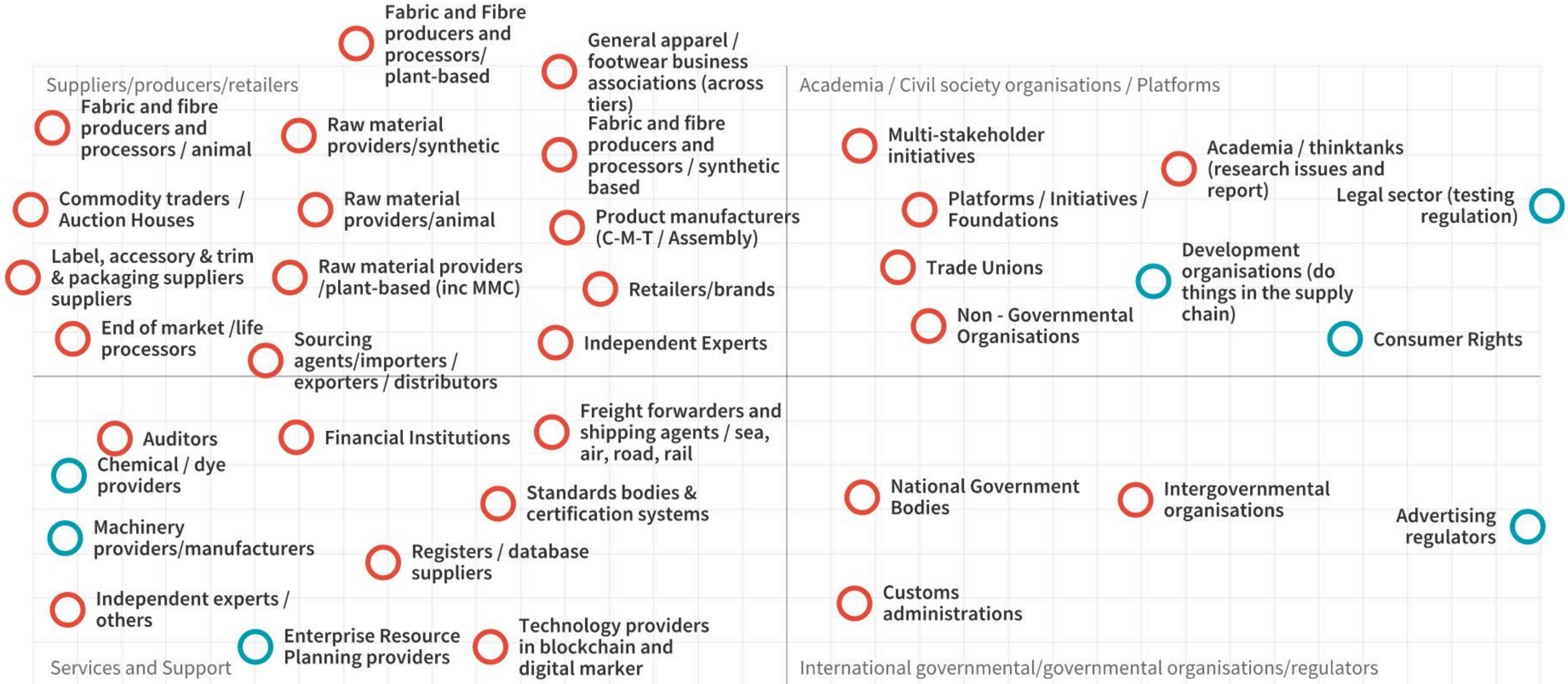
Using the recommendations from Phase 1 and 2 we have mapped out the individual organisations from each stakeholder group for the countries of most-importance, *keeping in mind that the type of material / textile will also be an important consideration*. Our objective is that we are inclusive as possible and attain parity across the project.

This is a very systematic approach. We are looking at around 40 different stakeholder groups, across 12 regions and countries. Where we can, we want to identify national associations that in turn have good levels of representation across their membership while ensuring we also consult with people on the ground that are doing jobs in the industry i.e.. growing, spinning, logistics etc.

 Identify gaps within the current project stakeholder platform.

 Consult with the working group and experts to identify which regional & national stakeholders to engage with.

# Global garment & footwear industry ecosystem



## 2.2 MAP COUNTRIES OF MOST IMPORTANCE

### Phase 2: Map countries of most-importance

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**EU Region**

**China**

**USA**

**Viet Nam**

**Bangladesh**

**India**

**Turkey**

**Indonesia**

**Republic of Korea**

**Ethiopia**

**Mongolia**

Exporters of clothing and textiles and importers of textiles, 2018 by % world share

	Exports clothing	Exports textiles	Imports textiles	Sum total
<b>European Union</b>	28.4	23.5	23.1	74.9
<b>China</b>	31.3	37.6	5.3	74.2
<b>Extra-EU Exports</b>	6.8	7.2	9.7	23.8
<b>United States of America</b>	1.2	4.4	9.1	14.7
<b>Viet Nam</b>	6.2	2.6	5.3	14.2
<b>Bangladesh</b>	6.4		3.3	9.7
<b>India</b>	3.3	5.8		9.0
<b>Turkey</b>	3.1	3.8	1.8	8.7
<b>Indonesia</b>	1.8		2.1	3.8
<b>Korea, Republic of</b>		3.1		3.1
<b>Chinese Taipei</b>		2.9		2.93
<b>Japan</b>			2.7	2.7
<b>Pakistan</b>		2.5		2.5
<b>Mexico</b>			2.0	2.0
<b>Cambodia</b>	1.6			1.6


Using [World Trade Organisation 2019 data](#), the table above shows the top ranked countries in the world clothing and textile market.


## 2.3 DRILL DOWN

### Phase 3: Drill down

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Next steps	
Actions	Timeframe
UNECE review	Complete
<b>1st round consultation</b>	<b>20 January - 29 January 2020</b>
Synthesise feedback & recommendations	29 January – 02 February 2020
2 <sup>nd</sup> round consultation, including face to face meetings at OECD Forum	03 February – 13 February 2020
Synthesise feedback and recommendations.	20 February 2020
Produce final draft report including conclusion of recommendations of stakeholders to engage with.	
Prepare engagement plan (UNECE) and supporting experts	TBC