The Caribbean Fashion and Glamour Industry: Exploring 'New' Ideas for Export and Investment-The Case of Trinidad and Tobago

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ABSTRACT

The Caribbean has long been recognised as a region replete with great creativity, fuelled in grand measure, by its ethnic and cultural diversity. While representation of Caribbean popular culture has entered the North American mainstream (carnival, music, cuisine, art, etc), other lesser-known cultural elements remain relatively neglected or underdeveloped. The fashion industry in the Caribbean is one example.

Despite the sector's tremendous investment capability and export potential, it has traditionally been overlooked in favour of other sectors including tourism, agriculture, bauxite/alumina, natural gas and petroleum. However, the industry lacks structure in addition to being plagued by a number of problems such as the lack of training for would-be designers, a lack of data on the performance of the sector, obsolete machinery and equipment, lack of financing and business support, lack of access to technology and intellectual property challenges. The sector also remains grossly under-researched, thereby constraining an evaluation of the performance of the industry, most notably in terms of its overall contribution to individual countries' GDP, annual export earnings as well as the total number of persons employed.

While Caribbean fashion is not new, increasing attention is now being paid to its export capabilities and the possibility of additional employment generation by regional governments and trade promotion agencies alike. Previously the focus on fashion in the region was in terms of its aesthetic and entertainment value. Within the ambit of cultural industries, fashion and glamour represent a potentially viable non-traditional sector for the region. This paper will discuss opportunities for the development of the Caribbean fashion industry in a novel manner, utilising foresighting to

explore future-focussed strategies for the economic exploitation of the sector. The article will largely draw from the specific experiences of Trinidad and Tobago. It will briefly review the obstacles to the development of the industry, as well as discuss initiatives and incentives that can propel the Caribbean forward in order to capture a more significant portion of the billion-dollar global fashion industry, using the example of Trinidad and Tobago.

For the purpose of this paper, fashion refers to high-end garments or designer wear (*haute couture*); trendy wear or ready-to-wear clothing (*prêt-à-porter*); while accessories include jewellery, footwear, handbags, belts, luggage, scarves, ties, etc. Glamour refers to the cosmetic and modelling industries.

The analysis of the sector in this paper is based on interviews conducted with industry professionals from the Caribbean (T&T, Barbados and Jamaica), drawing from three recent studies, the first commissioned for the European Union and the latter two for the National Institute for Higher Education Research Science and Technology (NIHERST) of Trinidad and Tobago by the same author of this paper.

INTRODUCTION

Over the last few decades, there has been growing interest worldwide in cultural industries, as they represent an avenue for phenomenal economic growth, job creation, for enhancing or reviving cultural practices that can generate income for entrepreneurs, in addition to stimulating cultural tourism. The proliferation of studies and scholarly literature on the topic points to its importance in both the economies of the developing and the developed world (EU CARICOM Study:Jan 2007; UNESCO: 2000, 2007; Tull: 2005, The Courier:2002). Not surprisingly, due to high turnover and growth figures the creative industries garnered a place on the international political agenda, as evidenced in the Lisbon process for the strengthening of economic growth throughout Europe as well as in the UNESCO Convention on Cultural Diversity.

Even small vulnerable Caribbean states are looking to the creative industries as a means of diversifying their economies heavily dependent on tourism, agriculture, oil and gas, bauxite, etc. While this paper makes a case for the development of the fashion industry as a new avenue of growth, investment opportunity and export capability, the approach taken to the discussion of its development departs from the traditional manner in which fashion has been defined in the Caribbean.

A number of initiatives have been undertaken in the region to develop the creative industries as a whole. These include the creation of a National Task Force on Cultural Industries in Barbados with a focus on arts and culture, design and media to provide the government with an effective development strategy to take the Barbadian cultural industries forward. Similarly, the government of Trinidad and Tobago has embarked on an ambitious diversification exercise away from the energy sector. This will be explored in further detail later in the paper.

Other developments in the cultural industries arena in the Caribbean include a series of WIPO/CARICOM meetings addressing IP issues and data collection challenges facing the region. The Caribbean Regional Negotiating Machinery (CRNM) has also played a major role in stressing the salience of cultural industries in the regional context through various workshops which have highlighted the impact of trade and technology on Caribbean creative industries in 2004 and the more recent study commissioned for the EU on trade and development challenges in the creative sector in CARICOM countries (Jan: 2007).

Other notable developments, in terms of previous research, include the foresighting study on the creative sector by a government agency in Trinidad and Tobago with a specific focus on carnival costuming and design and the fashion industry (NIHERST: 2006). NIHERST is in the final stages of completing an advanced fashion study which looks at global trends, uncertainties and discontinuities shaping the fashion industry worldwide and its potential impact on T&T's future opportunities in the sector.

REVIEW OF REGIONAL INSTITUTIONAL FRAMEWORK

THREATS (EXTERNAL)	OPPORTUNITIES (EXTERNAL)
▪ Increasing competition from the large-scale importation of cheaper clothing from China and the Far East (The China Effect or The China Factor). ▪ Increasing competition in the form of human capital, as China and Taiwan not only have a large labour force, but a significant pool of skilled labour and people who possess a good work ethic.	▪ Regional fashion market in the Caribbean ▪ Untapped diasporic market overseas ▪ Exploring the possibility of showing collections at 'non-traditional" fashion weeks which have a growing visibility, e.g. throughout Latin America, in other parts of the United States other than New York, Hong Kong, South Africa, Asia, India
WEAKNESSES (INTERNAL) Areas of relative disadvantage	**STRENGTHS (INTERNAL) Areas of relative and distinctive competence**
▪ Lack of government support ▪ Insufficient institutional support ▪ Weak business sponsorship ▪ Difficulty in sourcing quality fabric consistently ▪ High cost of sourcing inputs ▪ Lack of protection for designs ▪ Lack of recognition of the fashion industry as a viable sector ▪ Lack of quantitative data on the sector ▪ Lack of skilled labour ▪ Poor work ethic of employees ▪ Lack of cohesion among designers in the region (great deal of mistrust and	▪ Natural artistic capability and talent ▪ Fairly large domestic market ▪ Untapped diasporic market ▪ Diversity of design talent ▪ Linking of fashion industry to pageantry in the Caribbean and abroad ▪ Linking of fashion industry to carnival industry (Trinidad and Tobago) ▪ Linking of fashion industry to interior design and home furnishings, as well as sport

unwillingness to share ideas, etc)	

The EU/CARICOM (Jan. 2007) study summarised the competitiveness and weaknesses/strengths of the industry throughout the Caribbean region using a PEST and TOWS analysis. The TOWS analysis is illustrated above.

CONTEXT FOR PROMOTING THE FASHION AND GLAMOUR INDUSTRY IN TRINIDAD AND TOBAGO

One of the objectives of the Ministry of Trade and Industry (MTI) in Trinidad and Tobago is to achieve sustainable growth of the economy through the development and expansion of the country's non-energy sector. The government has therefore embarked on a planned approach to the diversification of the economy, building competitiveness and generating sustainable export-led economic growth. In this sense, the Trinidad and Tobago government has earmarked seven (7) key industries for vigorous development and expansion.[1] These are:

1) Yachting
2) Fishing and Fish Processing
3) Merchant Marine
4) Music and Entertainment
5) Film
6) Food and Beverage and
7) Printing and Packaging

Recent discussion between industry professionals and the MTI has led to the decision to include fashion as the 8th new sector for development. The fashion industry has benefited from a series of recent positive developments which complement the MTI's initiatives. The first, is a foresighting study of the creative industries in Trinidad and Tobago

[1] Information available on Ministry of Trade and Industry's website: http://www.tradeind.govt.tt

conducted by the National Institute for Higher Education, Research, Science and Technology (NIHERST),[2] identifying best-bet options for the **fashion sector**, carnival costuming and design, steelband performances and production, music and internet and music and video production. The foresight study is the first of its kind in the region, and is both an important and useful tool for developing more relevant and effective strategies as well as implementation plans based on realistic future scenarios.

Secondly, the National Entrepreneurship Development Company (NEDCO) through the Ministry of Labour and Small and Micro Enterprise Development, has been involved in the development of a fashion cluster of 35 small operators called the Fashion Entrepreneurs of Trinidad and Tobago (FETT). The more established fashion designers in the country have formed an association called the Fashion Association of Trinidad and Tobago (FATT).

However, the most significant development has been the proposal to create a Caribbean Institute of Fashion and Design (CIFD) under the aegis of the University of Trinidad and Tobago (UTT). The CIFD, which will be officially launched in October 2007, will undoubtedly play a huge role in addressing the training and education needs of the Caribbean's future designers. The CIFD curriculum is being designed with the input of some of Trinidad and Tobago's most successful designers, Meiling Esau and Claudia Pegus in addition to an overseas consultant from the London College of Fashion, Professor Colin Renfrew.

The CIFD must be commended for adopting an approach to establish itself that is currently lacking in developmental strategies at the governmental level, that of incorporating the diaspora. The CIFD has

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[2] Foresighting and Innovation Strategy for the Creative Industries Sector in Trinidad and Tobago, NIHERST, 2006/.

established an advisory council comprising ten members from the local fashion industry, in conjunction with members of the diaspora who have gained a reputation in the international fashion industry as well as members of two government ministries (Trade and Industry and Education).

In addition, three overseas consultants (nationals of Trinidad and Tobago) who occupy prestigious positions at both the London College of Fashion and Parson's The New School for Design in New York serve on the CIFD's Advisory Council. Professor Andrew Ramroop is Master Tailor on Savile Row, one of London city's best tailors of world renown with a clientele base in 53 countries. He is also Professor of tailoring at the London College of Fashion. Leslie Eric Francis. Professor of Pattern Design at New York's Parson's The New School for Design and Professor Phyllis Vashti de Verteuil, International Fashion Consultant and Adjunct Professor of the Fashion Department at Parson's, are currently part of the consultative process on the CIFD.

POTENTIAL OF THE TNT FASHION INDUSTRY

Fashion management consultant, Christopher Nathan, claims "since the launch of Caribbean Fashionweek in 2001, international fashion leaders have consistently showered praise on T&T fashion labels for innovative style and superb craftsmanship." In terms of the development of fashion as a lucrative and 'new' area for export and investment, various potential niche markets have been identified. These include but are not limited to: "textiles design; hand-crafted tailoring for men and women; high-end boutique-type fashion design houses; accessories design and manufacture; particularly handbags, swimsuits, belts and jewellery" (Nathan:2007). In addition, the NIHERST foresighting study highlighted 4 'best-bet' options for the fashion sector.

There are enormous economic benefits of developing the fashion industry to the economy. Trinidad and Tobago's robust manufacturing sector can lend support to many of the ancillary services and products that are required for the overall development of the industry. Particular attention will be paid to beauty culture, cosmetic manufacture, model management, fashion and image consulting. Trinidad and Tobago has the leading cosmetics company in the Caribbean-Sacha Cosmetics Ltd. The products are currently available in Walmart in Puerto Rico and the U.S. in addition to being available online. While its huge success can be measured by the fact that it was the official cosmetics of the 1999 Miss Universe Pageant and the official cosmetics of the 2000 and 2001 Miss USA Pageant (Reis, NIHERST: 2006) there is considerable potential for further expansion of the cosmetics industry in T&T and the Caribbean.

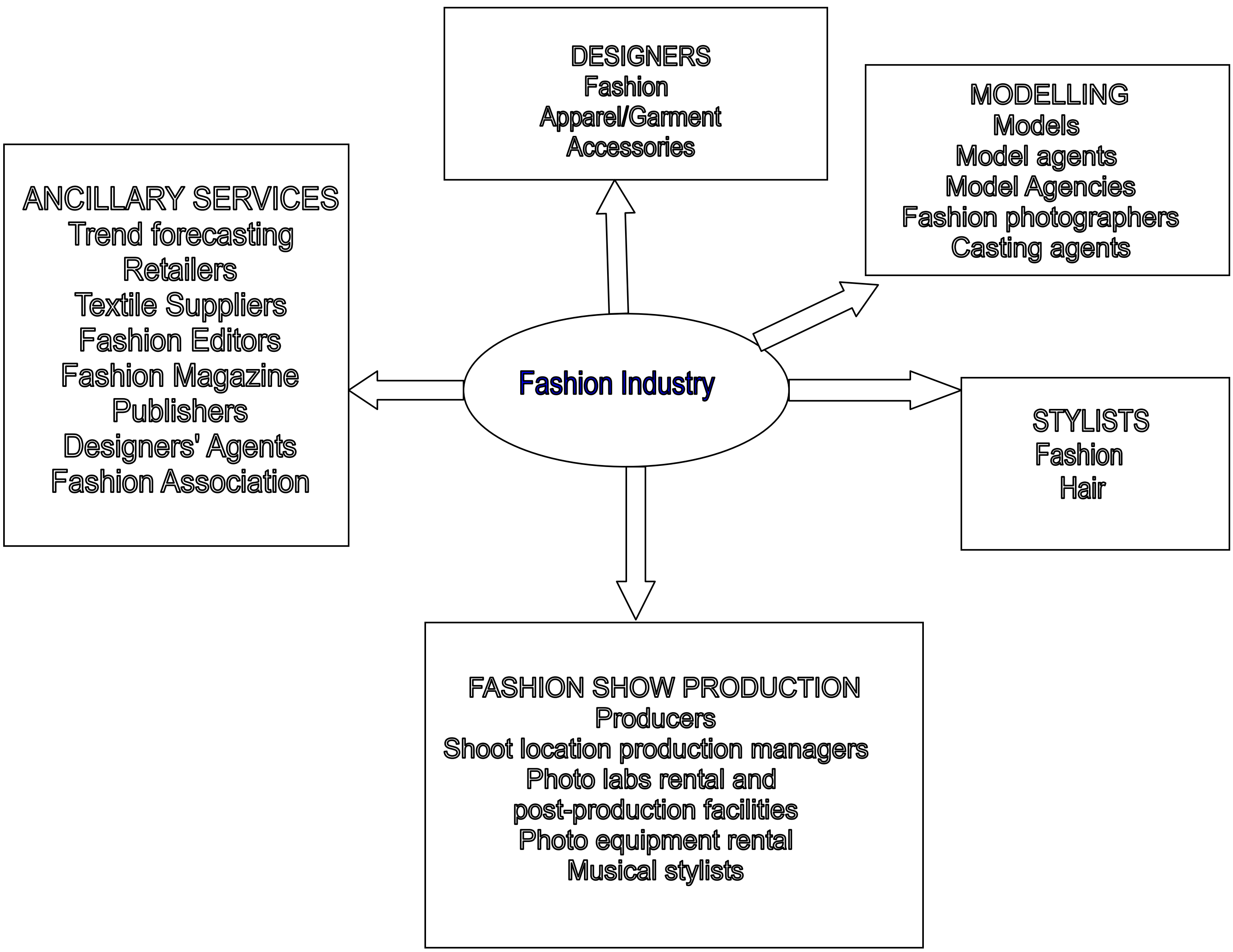
The allied industries are an integral part of the overarching fashion industry. In fact, a fashion industry cannot flourish in the absence of models, modelling agencies, quality fashion photography, cosmetics, hair stylists, etc.

Prolific T&T hair stylist, Ashvin Bally, gained international fame when the Miss Universe Pageant was held in Trinidad and Tobago in 1999. "Since then, Bally was privileged to have been chosen as an official hair stylist for the Miss Universe pageants: Thailand in 2005, Los Angeles 2006 and Mexico 2007" (Newsday:June 24 2007). There is considerable potential to export or contract T&T talent abroad in these ancillary industries, including stylists, fashion consultants, accessories designers and models.

Cheryl Bowles, owner of The Herbarium, is an innovator. Her entrepreneurial spirit is most evident in the creation of a new line of local organic and herbal ingredients, including, coconut water, sorrel, passion fruit, bois bande, seamoss, etc.

The following organigram simplifies the structure of the fashion and glamour industry:

FIGURE 1-SUPPORT SERVICES AND ANCILLARY SECTORS



BENEFITS TO INVESTING IN THE T&T FASHION INDUSTRY

Previous studies (NIHERST:2006; EU/CARICOM :Jan. 2007) lamented the lack of public and private sector buy-in and support necessary for the growth of the sector regionally. There are numerous benefits to expanding the T&T economy base through fashion. These advantages are of a socio-cultural as well as economic nature.

- A flourishing fashion industry can lift self-esteem and build confidence of practitioners. The Ministry of Labour and Small and Micro Enterprise Development through NEDCO has been providing technical and financial support to a group of upcoming designers – the Fashion Entrepreneurs of Trinidad and Tobago (FETT). One of its members had a successful showing of her collection in Winnipeg in 2006. FETT is also being assisted in attending the fashion and trade show in Curacao in October 2007.
- The promotion of the fashion industry as an alternative sector will further encourage innovation and spur creativity.
- It is hoped that the next generation of fashion designers could flow from the CIFD.
- A vibrant fashion industry has significant potential in terms of attracting positive media attention, destination branding and marketing. Trinidad and Tobago has been recognised for its design talent. It could also be marketed as the Fashion Capital of the Caribbean.
- The establishment of a lucrative fashion industry widens the range of career options for secondary school students, particularly those who are not academically inclined.
- It can encourage and foster natural creative talent and diversity of design that is critical for the long-term sustainability of the industry.

- In terms of its contribution to the economy, fashion and glamour can widen T&T's economic base, as an alternative form of industrial development.
- It can assist in achieving some of the long-term goals in the Vision 2020 plan as well as achieve objectives for diversification of the economy in the non-energy sector.
- The industry can provide an alternative source of foreign exchange revenue via the export of fashion and cosmetics 'Made in T&T'.
- It can benefit other areas of the economy directly and indirectly, e.g. through cultural tourism during the annual Makin' Style Fashion Week in September.
- The fashion industry can help develop adjunct industries in glamour-beauty culture, pageantry, modelling, etc.
- Finally, it can create a demand-pull for potential investors in T&T.

ECONOMIC INDICATORS

The lack of primary data on the fashion sector throughout the Caribbean compounds the ability to evaluate the sector's performance over the years. The industry has traditionally been researched from an historical, cultural and sociological perspective (NEDCO:2005; Reddock:1984) and considerably less from a business perspective. Hence, much of the economic data pertinent to the industry is not available. Another reason for the lack of availability of data is due to underreporting of revenue and because of the informality of the industry (suitcase trading, etc), as well as gross discrepancies in the case of data relevant to textiles, small medium and large garment manufacturers.

However, in terms of filling some key gaps the NIHERST study (2006) is a valuable starting point and offered some interesting data on employment, composition of clientele and exports based on interviews conducted with some high-end fashion or haute couturiers/quality garment manufacturers.

Table 1 illustrates that high-end fashion designers/clothing retailers employ approximately 368-593 people.

TABLE 1 NO OF PERSONS EMPLOYED IN HIGH-END / HIGH QUALITY FASHION INDUSTRY IN TRINIDAD AND TOBAGO

NAME	COMPANY/LABEL	No. of EMPLOYEES
Claudia Pegus	Claudia Pegus Designs Ltd.	7
Meiling	Meiling Inc. Ltd.	16-20
Heather Jones	Heather Jones Designs Ltd.	18-25
Robert Young	The Cloth Caribbean Ltd.	3-21
Diane/Gary Hunt	Radical Designs Ltd.	120
George/Joseph Janoura	Janouras Custom Design	160
Ecliff Elie	Ecliff Elie	22
Coline/Gregory Mills	Millhouse Clothing Co. Ltd.	4-10
Dexter Jennings	Concept Studio	8
Sean Gabriel	Westport	200

Adapted from NIHERST study:2006, updated 2007

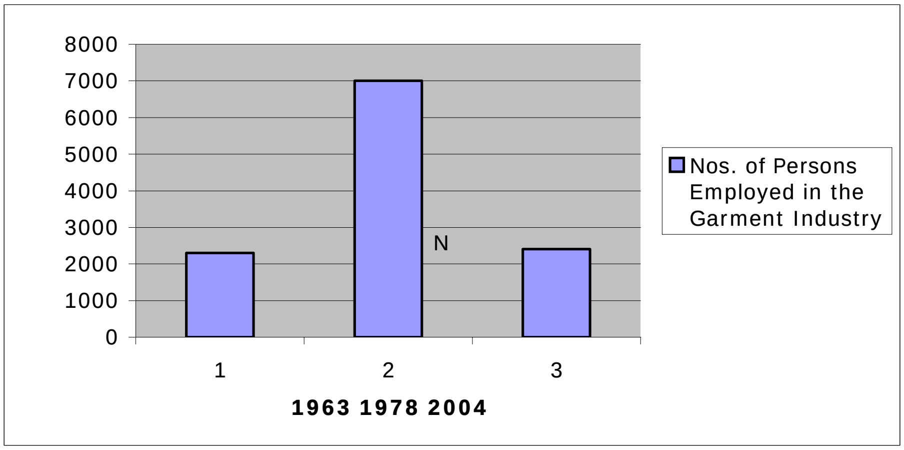
TABLE 2-LOCAL/INTERNATIONAL CLIENTELE OF HIGH-END FASHION DESIGNERS/GARMENT MANUFACTURERS IN % TERMS

NAME	LOCAL %	REGIONAL/FOREIGN %
Claudia Pegus	50	50
Meiling	80	20
Heather Jones *	20	80
Robert Young	65	35
Radical Designs Ltd.	90	10
Janouras	50	50
Ecliff Elie **	90	10
Coline/Gregory Mills	80	20
Dexter Jennings ***	75	25
Westport	100	0

Adapted from NIHERST study:2006, updated 2007

*In the case of Heather Jones, 40% of her foreign clientele comes from the Caribbean region and the other 40% the U.S. and Europe.
**Ecliff Elie’s clientele base includes the Caribbean, Europe and North America, listed as ‘foreign.’
***Dexter Jennings (Concept Studio) has a 20% regional clientele base. The other 5% is international.

FIGURE 2-NO OF PEOPLE EMPLOYED IN THE GARMENT AND TEXTILE INDUSTRY (1963-2004)



Source: Report by the Commission of Enquiry on All Aspects of the Garment Industry in Trinidad and Tobago, NEDCO Fashion Report, 2005.

TABLE 3-NO OF PEOPLE EMPLOYED IN COSMETIC MANUFACTURE

NAME OF COMPANY	CEO/MAN. DIRECT.	NO. OF EMPLOYEES
The Herbarium	Cheryl Bowles	37
Sacha Cosmetics Ltd.	Kama Maharaj	150

TABLE 4-LOCAL/INTERNATIONAL CLIENTELE OF COSMETIC MANUFACTURERS IN % TERMS

NAME OF CO.	LOCAL %	REGIONAL/FOREIGN %
The Herbarium *	n/a	n/a
Sacha Cosmetics Ltd. **	70	30

Data compiled by author

* The Cher mere line of cosmetic and hair products is currently sold in North America, Europe and a number of Caribbean countries, which will soon include Curacao. Cher Mere also has a few spa outlets in Trinidad, Tobago and one in Barbados.
**Their foreign-based operations include a sales office in the U.S.-Sacha Inc. USA, retail outlets in Canadian malls, Walmart in Puerto Rico and over 60 distributors throughout the world, including the Caribbean, South Africa, Cuba, Chile, Canada and Australia.

In terms of the industry's impact on national employment, industry development will help in the reduction of poverty in Trinidad and Tobago and provide entrepreneurial opportunities for nationals in small, medium and large-scale fashion businesses thereby increasing employment in the sector. According to the NIHERST study (2006), "CSO data for 2002 showed a total of 178 firms in the textile, garments, footwear and headwear category. By 2003 the number of firms had declined to 150. In 2004 there was a further decline to 147. These statistics are greatly at variance with figures provided by the Trinidad and Tobago Bureau of Standards (TTBS), which in 2006 had a total of 2,405 small garment manufacturing firms." The exact number of total employees is unknown and further research needs to be conducted in this area. "Many of these firms only employ less than 5 people. The monthly increase of 4-5 firms registering with the TTBS is worthy of note. The local garment and fashion industry has the potential to be an even more important component of the non-energy manufacturing sector" (NIHERST:2006).

OPPORTUNITIES FOR INVESTMENT

As stated in the previous section, there are some key indicators that are not available. These include the total number employed, the value of export earnings, contribution to GDP, local sales, total revenue generation and the countries to which the industry professional export. However, 'Made in TnT' textiles and apparel will increase foreign exchange, as well as make substantial contributions to the nation's GDP.

Nonetheless, there are many opportunities for local and foreign investment. Previous studies highlighted the following areas for public, private and foreign investment:

-Human resource development (training)

-Production capacity

-Marketing

-Distribution

-Fashion production (presentation of collections)

-Modelling Industry

-Glamour: cosmetics manufacture, beauty culture, etc

-Research and Development (R&D)

-Technological Innovation

-Establishing a database of designers and related industry professionals

-Funding/financing designers for trade shows, fairs, workshops, or presenting their collections regionally and further afield.

A great deal of emphasis was already placed on educational and training opportunities. It is intended that the future upcoming designers will largely be trained at the UTT. Currently, there are limited training opportunities offered under the multi-million dollar skills training programme (MUST) under the Ministry of Community Development to meet industry capability needs.

In terms of technological innovation, this requires considerable capital and the private sector has not assisted in contributing to improving the materials, equipment and plant machinery available to local designers. In an industry such as the fashion sector, which is predominantly design-driven, R&D are extremely important competitive factors which influence global competitiveness. Investment in technological upgrading is necessary to increase local designers' competitive edge and will impact upon their ability to move into niche marketing. An ongoing study by NIERST (2007) identifies key drivers which are reshaping design markets at the local and global levels, such as designers' access to and competence with ICT for virtual fashion, consumer trends in relation to demographic change, particularly ageing populations, and how this will impact upon changing needs and attitudes in design, future essential accessories, the impact of environment adjusting materials, electronic and

ICT-based smart materials, as well as other material science developments.

OPPORTUNITIES FOR EXPORT

Because of myriad problems that plague the industry, local designers are not globally competitive. The identification of niche markets can increase their export capability:

-Textiles design

-Hand-crafted tailoring for men and women

-High-end boutique-type fashion design houses

-Accessories design and manufacture; particularly handbags, swimsuits, belts and jewellery

-Development of a Sea Island Cotton Clothing line

-Export of models for international catwalks, magazine shoots and commercials

-Export of cosmetics, particularly natural components, using organics and indigenous herbs.

Despite the availability of data to evaluate past performance of the sector and the country's small size, there are future fashion opportunities for Trinidad and Tobago that can be leveraged on the "Small Country, Big Passion" theme that was utilised during the national football team's campaign at the 2006 Soccer World Cup in Germany. There are 5 major fashion sub-sectors which represent viable options for TnT:

1) Creative Fashion
2) Convergence Fashion
3) 'Old Gold" Fashion
4) 'Virtual' Fashion
5) Creative Design

The first sub-sector is a high-value global niche area that constantly evolves through innovation of ideas, materials, themes and 'fascination' (NIHERST:2007). A number of young designers whose work constitutes 'wearable art' can play a role in this sub-sector. These include Ecliff Elie, Kevin Ayoung-Julien of KAJ Designs and Rodney Alexander, both based in Tobago and Deron Attzs.

'Convergence' Fashion is an emerging field which combines various sectors, such as ICT, biomechanics, fashion design and even human biology. The NIHERST study (2007) posits that "there are some huge opportunities emerging that will be built around 'solutions for one'-individually customised packages-which are perfect for a small country like T&T to become a player in." There is room for collaboration between the Department of Bio-engineering and the Caribbean Institute of Fashion and Design (CIFD) at the UTT.

"Old Gold' Fashion or the notion that 'grey is gold' places emphasis on a rapidly ageing T&T, which will alter the manner in which people design, as issues of limited mobility, gerontological diseases like Alzheimer's, incontinence, etc, will undoubtedly influence the way in which designers create to accommodate their older customers.

'Virtual' Fashion offers fast-growing opportunities for any designer to sell virtual fashion in virtual marketplaces on sites like 'Second Life.' (NIHERST:2007).

The final sub-sector, Creative Design refers to a global trend of collaborative design work done by various teams across the world through a virtual interface.

CONCLUSION

A considerable amount of work has been conducted on the fashion sector but is rather limited in terms of export capability because of the focus on the garment and textile industries. High-end fashion or haute couture has only been studied in the period 2006-7. Prior to 2006, these studies had limited relevance to how markets would be in the year 2020 in keeping with the country's plan of attaining developed country status. Future evolution of global value chains offer the greatest potential for connecting the fashion industry in TnT with global niche stakeholders and end-consumers. The three aforementioned flagship studies of the industry (NIHERST:2006/2007) and EU/CARICOM (Jan.2007) reviewed the local institutional framework as well as that of the English-speaking Caribbean. A new strategic direction is required and the following areas need to be addressed: marketing, production, finance, infrastructure and various policy issues.

Strengthening the viability of the fashion industry in Trinidad and Tobago could position the country in a competitive and global environment to take advantage of the billion-dollar annual industry. Trinidad and Tobago has the potential to harness its existing natural creativity to spur job creation, boost exports and contribute to the diversification of the non-energy sector through the development of the fashion and glamour industry. This will only become a reality once a concerted effort is made at every level to move towards the goal or vision of TnT attaining a certain standard as a key player in the global fashion industry.

This would require that "every initiative and action in the political, environmental, R&D, social and economic spheres can be aligned so that they are focussed in the same direction" (NIHERST:2007)-moving the country towards that target. The decisions made and the strategies implemented in the present will determine whether or not the targets set for the industry can actually be achieved. The aforementioned opportunities for export and investment will only be feasible depending on the resources, capabilities, technology, financial support, infrastructure and regulatory support available in the local T&T context.

The options available to TnT include either being a global niche player, global niche linked player or a global lead player. In order for TnT to be a global niche player in creative design and fashion, as well as virtual fashion, highly developed niche opportunities based on local resource capability will have to be leveraged. There are opportunities for investment in future T&T owned-businesses with largely web-based marketing. As a global niche linked player, T&T can pursue being “a niche player within a larger global alliance or partnership that will develop and market relatively technically complex high-value niche-focussed products and services” (NIHERST:2007). As a global leader T&T is likely to develop successfully through “being a significantly highly networked global player with major collaborative or outsourcing arrangements with other key stakeholders in other parts of the world” (NIHERST:2007), allowing T&T stakeholders to deliver internationally competitive outcomes for major clients.

The opportunities previously identified must be better understood so that can “be converted into operational business entities within the next 5 years, so that T&T is able to progress towards its goal of achieving fully developed nation status in 2020” (NIHERST:2007). This is a critical success factor if higher quality employment opportunities are to provided.

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