

inventory by computer).

b) To study commissions for joint purchase and storage fees and so on.

c) To pursue the possibility of purchasing fabrics and yarn made from fine, high count wool from member companies of the Asociacion de Industrias Textiles del Uruguay.

d) to study any other items as needed.

6) Business of transport subcommittee

a) To study which methods of transport can be operated jointly and which methods are most effective on the basis of the report prepared by the project team.

b) To study the feasibility of joint use of packaging materials.

c) To study any other items as needed.

7) Business of information and sales subcommittee

a) To study how world fashion information and technological information can be utilized jointly, and what actions should be taken.

b) To study the feasibility of joint participation in foreign merchandising and foreign fairs, the cost of which cannot be absorbed by individual companies.

c) to study any other items as needed.

(3) Corporation in charge of operating cooperative undertaking

1) The corporation should be operated by associations and individual companies with the assistance and support of the relevant government agencies.

- 2) The necessary capital should be financed through low interest rate borrowing and capital participation by individual companies.
- 3) Operating costs should be financed by annual membership fee revenue and plant and equipment usage fees.
- (4) Course of events prior to the joint use phase of the cooperative undertaking

The course of events beginning with the inauguration of the cooperative undertaking and ending with the commencement of joint usage should be as follows.

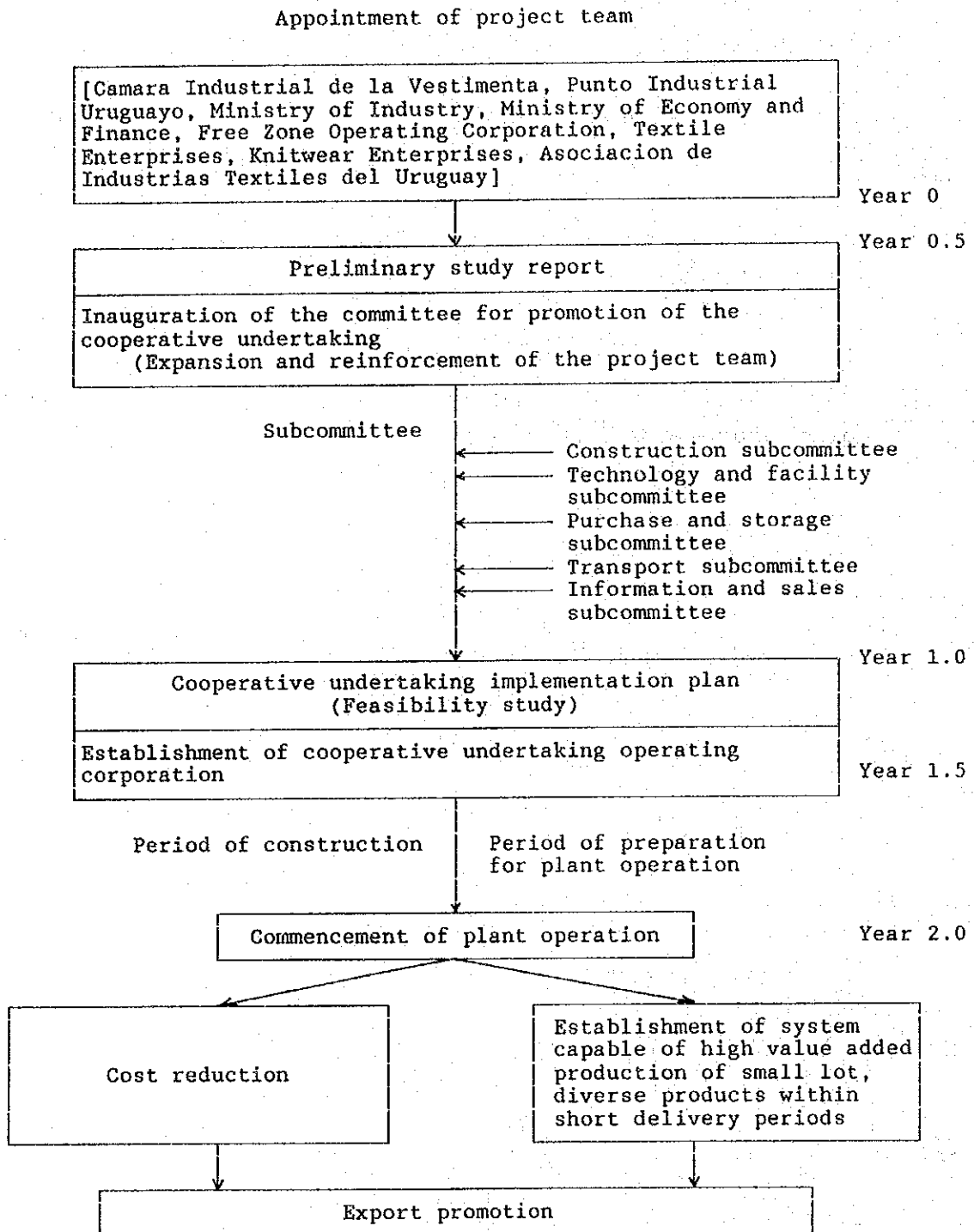


Fig. III-4-2 Procedure for promotion of cooperative undertaking

4-2-4 Finishing plant (Jointly operated corporation)

(1) Reasons for selecting the finishing plant

- 1) The finishing process is indispensable for garment and knit garments.
- 2) The existing presses currently owned by Uruguayan garment enterprises in general are more outdated than other equipment and will have to be renovated sooner or later.
- 3) By upgrading the shape retention and beauty of products, their perceived quality level can be elevated.
- 4) The sponging process is critical in raising non-price competitiveness, though not currently carried out by Uruguayan garment sewing enterprises. Renovation of the existing finishing press process is considered more critical than the inclusion of sponging. Likewise, a washing plant may be critical for denim garments but is not needed for woolen or knit garments. Although joint use of CAD/CAM may be critical, when various related factors are taken into consideration, such as that development of competent operators would be time consuming, on-line communication is required between company offices and plants, and enterprises can operate without the help of CAD/CAM, it was decided to give priority to the finishing plant which would serve to elevate the level of Uruguayan garments as they are. While the capacity of a finishing plant to be managed by one enterprise for processing the products of others at a fee should be no greater than twice its own demand in view of future risks (decrease in the number of client enterprises etc.), the number of enterprises which are prepared to commission products for finishing to the plant would rather be limited. Consequently, it was considered more feasible to establish a finishing plant through joint investment to be jointly managed by those enterprises which recognize the need for cooperation in order to ensure implementation of the

project.

Because of the reasons mentioned above, inter-enterprise cooperation is exemplified by a finishing plant, to be jointly managed by participating enterprises, whose business covers collection from participating enterprises -> receiving -> sorting -> pressing -> ironing -> inspection and labeling -> warehousing -> packaging -> crating -> consignment -> transport; the fundamental operation of the plant being pressing.

(2) Finishing plant (managed by a joint cooperative business corporation)

1) Assumptions

(a) Finishing capacity shall be 1,000 garments per day.

(b) Garments to be finished shall be men's suits, women's dresses, coats, casual wear, knitwear as outer wear.

(c) Lease fee of plant building site is excluded because no details are known.

2) Building construction in cost

(a) Finishing plant : 3,300m², (b) Distribution center : 6,600m², Total : 9,900m².

Building construction in Uruguay costs 100 - 150 US\$ per sq. meter, depending on the amount of foundation work involved. If costs of electrical cabling and city water and sewage work are added, building construction costs would be US\$125 - 175 per sq. meter, averaging US\$ 150. Thus, the total building construction cost would be US\$ 1,490,000.

3) Number of facilities, equipment and approximate cost

Facilities and equipment, their number are shown in Table III-4-3. The total amount of facilities and equipments is approximately US\$ 1,420,000 on the basis of ex-work in Japan.

Table III-4-3 Facilities and equipment of finishing plant

Facilities and equipment	Quantity
Press	66
Iron and iron stand	15
Body	15
Vacuum pump 10HP	8
Boiler 200kg/h	8
Hanger rack	300m
Roller conveyor	50m
Air conditioner	1
Cart	50
Miscellaneous (Packing machine, labeling machine etc.)	
Truck	3

4) Personnel requirement

The number of finishing plant personnel required for collection, pressing, packing, shipment and transport is 100.

The breakdown of personnel is as follows.

- Plant manager : One (1)
- Administrators : Six (6)
- Clerks : Three (3)
- Receiving and sorting : Five (5)
- Pressing/ironing : Seventy (70)
- Inspection : Five (5)
- Packaging/crating : Four (4)
- Consignment/transport : Six (6)
- Total : One hundred (100)

5) Approximate cost of finishing plant

The approximate monthly cost is calculated based on the following assumptions.

- Finishing capacity	: 1,000/day
- Number of personnel required	: 100
- Average personnel cost	: US\$ 200/month/ capita
- Electricity charge	: US\$ 0.06/kWh
- Boiler fuel oil charge	: US\$ 290/kl
- Boiler (1,200kg/h) fuel oil consumption	: 90 l/h
- Diesel oil charge	: US\$ 430/kl
- City water charge	: US\$ 0.64/kl
- Monthly truck mileage (3 trucks)	: 2,000km
- Fuel consumption	: 3km/l (0.33 l/km)
- Exchange rate	: Yen 125/US\$

[Unit : US\$/month]

1) Personnel cost (100 X US\$ 200 /month/capita, including social security charge)	20,000
2) Electricity charge (800kW X 8h/day X 25 days/month X US\$ 0.06/kWh)	9,600
3) Fuel oil charge or steam generation (90 l/h X 8h/day X 25 days/month X US\$ 0.64/kl)	5,520
4) City water charge (30 kl/h X 8h/day X 25 days/month X US\$0.64/kl)	3,840
5) Consumables	1,600

6) Office supplies	800
7) Truck fuel cost (2,000km X 0.33 l/km X US\$ 0.43/l)	290
8) Building amortization (amortized over 20 years, US\$ 1,485,000 X 0.109/12)	13,490
9) Machinery amortization (amortized over 7 years, US\$ 1,418,000 X 0.28/12)	11,350
10) Miscellaneous expenses (10% of 1) - 7) above)	4,170
Total	70,660

Monthly expenses including amortization divided by monthly capacity of 25,000 pieces gives a per piece cost of about US\$ 3.

No costs for the dispatch of guidance personnel or taxes are included in the above.

4-3 Expansion and Reinforcement of Professional Training School (UTU)

4-3-1 Need to reinforce UTU

To extricate itself from the subcontracted processing trade and establish sales development based on its own independent merchandising, the Uruguayan garment industry would definitely need competent merchandisers and competent operators of high technology equipment. Because there are currently very few of these people available, a system for their training must be developed in Uruguay.

Though the Industrial Design Center (CDI) in Uruguay has a garment course, its curriculum is primarily focused on the education and training of designers. Establishment of a new institution dedicated to the education and training of merchandisers and operators would be time consuming and require substantial funds, while making use of the existing school buildings, teachers and curriculum of the Universidad de Trabajo del Uruguay (UTU) would be more expedient. While UTU currently operates courses on sewing and knitting technique, quality control, design and so on, (1) the quality of teachers must be improved, (2) the curriculum must be reinforced, and (3) the practice facilities must be reinforced. Subsequently, UTU must be reinforced in order to solve those pending problems. A committee in charge of reinforcement of UTU would have to be appointed to begin with in order to thoroughly study and implement the project.

4-3-2 Method and contents of reinforcement

(1) Appointment of a committee for the expansion and reinforcement of UTU

1) Construction and organization

The committee should consist of members representing the

Ministry of Education and Culture, UTU, CDI, and Ministry of Industry. Representatives of PIU and CIV should also participate as observers.

- (2) Business of the committee for the expansion and reinforcement of UTU

- 1) Overseas study and training of teachers

PIU bore part of the expenses for dispatching teachers to Germany in 1990 to study knitting technique. Likewise, teachers are being sent to SENAI (Brazilian educational institution including garment faculty) for study and training.

Under any circumstance, improving the quality of teachers is imperative in order to establish a system capable of coping with the need for high value added production of diverse varieties in small quantities.

The master course offered by the Fashion Institute of Technology (FIT) in New York, the Ecole Nationale Superieure d'Art Decoratif in Paris, the advanced course at ESMOD which is the largest private specialized educational institution in France, and the Domus Academy in Milan are all recommended for training teachers and trainee teachers.

- 2) Establishment of new curriculums in product planning and market research

No curriculum exists for the education of merchandisers in the current advanced course offerings of UTU. As mentioned earlier, without improving product planning power to help realize high value added production, the Uruguayan garment industry will have no future in the international market. Establishment of these new curriculums would be significant in this regard.

Expatriate lecturers should be invited until Uruguayan teachers have been fully educated and trained as described above. Establishment of a curriculum for the education and training of CAD/CAM operators must be studied.

3) Training facilities

- a) The existing training facilities of UTU consist of nothing more than several sewing machines and hand flat knitting machines. The clothing and knitting industries are assisting UTU in the training of sewing technique, and most actual training is conducted in the plants of manufacturers.

Another alternative to supplement the short supply of training facilities would be to investigate the feasibility of joint use of garment related plant and equipment, including any facilities, currently owned by CDI, and CAD owned by LATU and any other institutions or colleges.

- b) Several Uruguayan businesses own computer integrated knitting machines and state-of-the-art automatic sewing machines and pressing machines. The feasibility of requesting permission to use these for training students should be studied as well.

4) UTU/CDI joint lecture and practice

Amalgamation of UTU and CDI, or at least of their garment courses, may not be easy from an organizational point of view. Yet it is worthwhile to consider the possibility of joint lectures and practice sessions in view of the limited number of teachers and limited facilities available for practice.

- (3) Curriculum required for UTU and facilities and equipment required for education and practice

The curriculum of UTU needs to be extended as follows in order to improve the quality of its students. Reinforcement

and renewal of facilities and equipment for education and practice are needed.

1) Curriculum

As described earlier, if the Uruguayan garment industry can extricate itself from the subcontracted processing trade, exercise originality and produce trendy products, that would lead to increased exports. Development of competent merchandisers is therefore absolutely necessary.

Compulsory subjects of merchandising courses at representative garment education institutes in Japan are as follows. (Although the merchandising course is a 3 year course, basic subjects in the first year are excluded.)

Adoption of a similar curriculum by UTU is recommended.

Second year subjects : (1) Marketing science, (2) Fashion business science, (3) garment modeling (design, theory, practical technique, plane and 3 dimensional cutting), (4) design management, (5) fashion design drawing, (6) color modeling science, (7) textiles (dyeing, control), (8) outline of production control.

Third year subjects : (1) Merchandising science, (2) merchandising performance, (3) textiles (planning), (4) visual merchandising, (5) fashion marketing, (6) 3 dimensional cutting, (7) computer system, (8) computer graphics, (9) apparel CAD design science, practice.

2) Facilities and equipment for practice

The types, number required of facilities and equipment which are considered necessary for the reinforcement of UTU are shown in Table III-4-4 Facilities and equipment (A) for garment, (B) for knit related practice on the basis of following assumptions.

- (1) The existing school buildings of UTU shall be used.
- (2) Twenty students shall be admitted per year.
- (3) Although it is desirable for UTU to own CAD and computer graphics systems, those owned by LATU and CDI shall be used by UTU.

Prices of these facilities and equipment would be (A) about US\$ 410,000 for garment related facilities and equipment, and (B) about US\$ 190,000 for knit related facilities and equipment on the basis of ex-work in Japan.

3) Approximate expenses

Monthly expenses are calculated on the basis of the following assumptions.

- Number of school days (20 days/month)	: 240 days/year
- Electricity charge	: US\$ 0.075/kWh
- Boiler fuel oil charge	: US\$ 0.29/l
- Boiler (30kg/h) fuel oil consumption	: 4.5 l/h
- Exchange rate	: Yen 125/US\$

It is also assumed that cost of materials, lining, interlining and other accessories needed for instruction shall either be borne by students or reimbursed by concerned enterprises.

[Unit : US\$/month]

1) Electricity charge (200kW X 8h/day X 20 days/month X US\$ 0.075/kWh)	2,400
2) Fuel oil charge for steam generation (4.5l/h x 8h/day x 20 days/month x US\$ 0.29/l)	210

3) Consumables (needles and oil for machines etc.)	240
4) Literature (fashion magazines etc.)	80
5) Amortization (Amortized over 7 years, (410,800 + 184,900) X 0.28/12)	13,900
6) Miscellaneous expenses (10% of 1) - 4) above)	300
Total	17,130

Monthly expenses excluding amortization are about US\$3,200

No costs for the dispatch of guidance personnel or taxes are included in the above.

Table III-4-4 (A) Facilities and equipment for garment related practice

Classification	Q'ty
Name of facility or equipment	
Pattern	
Stand for the preparation of paper patterns	10
Rule	10
Scissors	10
Cutting	
Inspection machine	1
Spreading stand (6m)	1
Spreading machine	1
Cutting machine	
Band	1
Longitudinal blade	2
Circular blade	1
Numbering	1
Bonding	
Bonding machine	
Roller	1
Flat	1
Sewing	
Final sewing	
w/o thread cutter	5
w/ thread cutter	1
Vertical differential feed	1
Needle feed	1
Scalpel cutter	1
For jeans	1
For heavy cloth	1
Double needles	1
Double needles corner sewing	1
Ring sewing	
Single needle	2
Double needles	1
Cylindrical double needles	1
Bar tacking	
Large	1
Hole hem stitch	1
Eyelet	
Hole hem stitch	1
Overlock	
Single needle	2
Interlock	1
Button sewing	1

(to be continued)

(continued)

Classification	Q'ty
Name of facility or equipment	
Sewing	
Tacking	
Flat	2
Post	1
Cylindrical	1
Scooping	
Blind stitching (hazashi)	1
(maturi)	1
Zigzag	1
Trouser loop	1
For knitting	
Lock	1
Linking	1
Double needles, one side	1
Iron	
Iron	10
Ironing stand	
Flat	5
Horse	1
Round	1
Press	
Intermediate press	
Left	1
Right	1
Finish press	
Front body Left	1
Right	1
Finish press	
Sleeve Left	1
Right	1
Finish press	
Shoulder	1
Finish press	
Side	1
Finish press	
Back	1
Finish press	
Lapel	1
Universal press	1
Trouser	
Inside leg	1
Trouser	
Waist	1
Inspection	
Inspection supplies	5
Body	5
Accessories	
Maintenance parts	1 set
Attachment	1 set
Gauge set	1 set
Maintenance tool	1 set

(to be continued)

(continued)

Classification	Q'ty
Name of facility or equipment	
Heat source	
Boiler 200kg/Hr	1
Vacuum pump	1
Water softener	1
Plumbing	1 set
Plumbing	1 set
Total	
Drawing table	10
Body	10

Table III-4-4 (B) Facilities and equipment for knit related practice

Name of equipment	Type	Q'ty
Winder (Bobbin winder)	4 spindle, 3 strings	1
Hand flat knitting machine	7G	5
Hand flat knitting machine	12G	5
Computerized flat knitting machine	7-12G	1
Computerized pattern preparation machine		1
Dial linking machine		2
Flat linking machine		2
Overlock machine		2
Flat lock machine		2
Double chainstich machine		2
Lockstitch machine		2
Vertical blade cutting machine (Hand operated)		2
Finishing press (Steam)		1
Steam iron		1
Ironing board		1
Body		5

(the end)

(4) Significance of expansion and reinforcement

The term "expansion and reinforcement" as used herein is to be understood to mean upgrading the quality of teachers and students as well as renovation of facilities. Carrying out expansion and reinforcement would encourage the development of successive generations of talented personnel that could continue to contribute to the development of the Uruguayan garment industry long into the future.

It is highly desirable that the Ministry of Education and Culture fully recognize the difficulties confronting the Uruguayan garment industry--i.e. imports are increasing while exports are stagnant--and take action to budget for the expansion and reinforcement of UTU facilities.

4-4 Implementation of Fashion Week

4-4-1 Effects of Fashion Week

A nationwide Fashion Week would contribute to the expansion of exports in addition to the effects listed hereunder.

(1) Effects of investment not stated in figures

The opinions of those in charge of organizing Fashion Weeks throughout the world could be summarized by saying that they definitely believe that a nationwide Fashion Week has more far-reaching tangible and intangible effects than similar events organized by garment enterprises alone or by garment industry associations. While the importance of an order accepting meeting is not denied, it is certain that an event of this kind would have intangible investment effects which cannot be stated in figures.

For example, up-to-date live information would be made readily available by buyers, those involved in garment related industries and mass media representatives visiting the Fashion Week from other countries. Also, various advice would be made available with respect to Uruguayan garments. Furthermore, the image of the Uruguayan garment industry in overseas markets would be enhanced significantly.

(2) Expansion of domestic demand

The strong impression created by a nationwide Fashion Week would trigger strong interest in the Uruguayan people, which in turn would serve as the vital energy supporting the Uruguayan garment industry in its efforts to expand domestic demand.

(3) Concentrated short term effects

A Fashion Week drawing the participation of many textile, garment and subsidiary material enterprises would collect many visitors within a short period of time, with concentrated short term effects on textile, garment and fashion industries.

4-4-2 Steps to be taken for the organization of a Fashion Week

A nationwide Fashion Week in Uruguay would have to be organized in accordance with a well established program in order to avoid undue strain on the Uruguayan garment industry.

- (1) Fashion shows and exhibitions in Uruguay are being organized by renowned designers, high class garment stores and the garment industry by themselves. It is recommended to let government agencies and industrial associations promote the unification of these fashion shows and exhibitions in order to organize a nationwide Fashion Week event at least twice a year targeted to the domestic market.
- (2) The second step would be to invite the participation of the Asociacion Industrias Textiles del Uruguay, and textile, garment and subsidiary material manufacturers in order to enlarge the scale of the Fashion Week events. Simultaneously, operating methods and advertising of overseas Fashion Week events must be studied and examined in order to find methods compatible with Uruguay.
- (3) As the third step, a state-level Fashion Week targeted to the expansion of exports should be planned.

By taking the steps mentioned above, the risks associated with the organization of a Fashion Week event could be managed and an effective Fashion Week would become possible.

4-4-3 Uruguayan Fashion Week

(1) Sponsors and co-sponsor

It is suggested that the relevant government agencies be the sponsors of Fashion Week events, together with various textile and garment related associations belonging to the Camara Industrial, while the city of Montevideo be the co-sponsor.

Sponsors: CIV, PIU and Asociacion Industrias Textiles del Uruguay, textile and garment related associations belonging to other industrial chambers, Ministry of Industry, Ministry of Economy and Finance, Ministry of Foreign Affairs, Ministry of Tourism.

Co-sponsor: City of Montevideo

(2) Management of Fashion Week events

The organization and budget needed beforehand to implement Fashion Week events are discussed in this part.

1) Fashion planning executive committee

a) Planning executive committee chairman

The first step in implementing Fashion Week is to organize a planning executive committee. Election of the committee chairman, the key person, is very important. The committee chairman must be knowledgeable in the culture and traditions of Uruguay, and have good personal connections with internal and external political and business circles and the mass media. The first job of the planning executive committee chairman, once elected, will be to elect a committee secretariat director who will assist the committee chairman. It will be one of splendid ideas that the first lady may be elected as an honorable committee chairwoman in

order to emphasize the state level of the event both domestically and abroad.

b) Planning executive committee members

The planning executive committee should consist of ten committee members including independent and active Uruguayan designers, representatives of textile and garment related sponsoring associations, staff of concerned government agencies as well as one committee member in charge of public relations.

c) Business of planning executive committee

The planning executive committee should have the full authority needed to manage Fashion Week events. The committee should appoint three subcommittees respectively in charge of order acceptance fairs, fashion shows and other related events to be held during Fashion Week, and public relations in order to manage Fashion Week as a whole.

The committee should study the objective, content, budget, timing and site of events to be held during Fashion Week, as well as the acquisition of appropriate sites, reception of buyers, list of invitees including guests from the mass media, method of admittance, public relations activities and so on.

d) Financing

The planning executive committee shall be responsible for securing the needed financing. Sources of funds may include the government, concerned government agencies, subsidies offered by quasi-governmental public institutions, participating textile and garment related association members, participation fees charged for fashion shows or order acceptance fairs, financial aid offered by related industrial associations and various business institutions,

and financial aid offered by garment related enterprises including garment accessory manufacturers, textile manufacturers, sewing machine manufacturers, trading houses, computer companies and so on.

e) Secretariat

The secretariat shall assist the committee chairman. Executive staff to be in charge of various events held during Fashion Week and office space for them will be needed. The executive staff must include specialists in charge of public relations, arrangement of fashion shows and convention halls.

2) Schedule for holding Fashion Week (Draft)

a) The casino in the city of Montevideo, the club house of golf field located in high class residential area, or the premises of the Montevideo railway station, which are barely used, should be utilized as the first place of implementation of Fashion Week and the second candidate is Punta del Este.

b) In principle, Fashion Week should be held once in March (Spring/summer) and once in September (Autumn/winter).

(1) The first Fashion Week should be organized for to feature autumn/winter garments.

The second Fashion Week should be organized for to feature spring/summer garments.

(2) To be held twice a year, once in March (spring-summer season) and once in September (autumn-winter season).

1st Fashion Week : In September, targeted to the coming autumn-winter season

2nd Fashion Week : In March, targeted to the coming spring-summer season.

(3) Schedule of 1st Fashion Week

- September : Members of the committee in charge of planning and implementation shall be appointed and the chairman of the committee shall be elected.
- End March of next year : Orientation meeting for the enterprises participating in fashion show and order acceptance meeting.
- End May of next year : Closing of application period for participation by enterprises.
Drawing of lots for allocation of convention booths to participants and dispatch of invitations to invitees and visitors.
- Early September of next year : Exhibition and decoration of the booths of exhibitors.
- Mid September of next year : Opening of the Fashion Week.

(4) Fashion Week

Fashion Week has two aspects, fesival and business, centering around the order acceptance fair. No fashion event can be successful without both of these aspects. It must be remembered, however, that the festive aspect is more important. One has to recognize that fashion is more than just a business activity: it is an economic activity to be sure, but one deeply related to culture, social trends, history, tradition and regional characteristics. A fashion fair collectively represents all these factors.

* Fashion exhibits and business negotiations

Participant's booths should be arranged in a large convention hall in order to offer visiting buyers the opportunity to see exhibits of product samples and talk business. A press release including photographs and pamphlets should be prepared and distributed.

* Miss/Mister Uruguay Fashion Festa Contest

Beautiful women and handsome young men are indispensable for fashion. Attractive young models who can represent Uruguayan fashion through their smart and stylish presentation of garments must be selected. Those selected should be given contracts as campaign models for the subsequent Fashion Week, and as advertising models for Uruguayan apparel enterprises.

* Fashion show

A fashion show should be held to introduce the products of the Uruguayan garment industry and Uruguayan designers. Participants should offer original products that agree with the unifying theme in the numbers they are allocated. It is important that the unifying theme be based on the culture, history and industry of Uruguay. The fashion show will offer an opportunity to uncover unknown talented Uruguayan designers and a chance for Uruguayan brands to gain recognition.

* Entertainment

In conjunction with the fashion show, entertainment should be provided featuring invited internationally famous entertainment stars. If superstars can be invited, the mass media including TV, radio, newspaper and magazine reporters will rush to the show for

coverage, allowing the message of Uruguay Fashion Week to circulate widely throughout the world. If Uruguayan garments on exhibition in the fashion show are also used as stage dress, the effect will be doubled.

- * A symposium of world famous designers and Uruguayan designers

A symposium of a group of designers representing Uruguay fashion, together with world famous designers should be organized.

- * Raffle prizes

Entrance tickets can be numbered to offer raffle prizes during a session on the last day of Fashion Week. Prizes such as an automobile presented by a automaker (to be imported tax-free through the cooperation of the Uruguayan government), round-trip air tickets for two to Spain presented by an airline company, or a camera presented by a camera manufacturer should be arranged.

- * Closing reception party

A closing reception may be arranged in a gorgeous mansion, a locale suitable to glorify the closing of Fashion Week. Local and foreign celebrities, representatives of participating enterprises, buyers and mass media reporters should be invited so they may casually mingle and commit with each other to rendezvous at the next Fashion Week. The winners of the Miss/Mister Uruguay Festa contest should be present, dressed in prize winning garments, as the highlight of the event.

3) Points to be kept in mind for the holding of Fashion Week

The following points should be kept in mind at all times for the holding of Fashion Week.

- a) Whether the schedules of those concerned can be coordinated within the proposed schedule for Fashion Week must be confirmed.
- b) Whom to elect as the chairman of the planning executive committee is the key to success of Fashion Week.
- c) The selection of a unifying theme is another task that must be given adequate attention if Fashion Week is to be a success. Various factors such as the location (Montevideo, the capital city of Uruguay), social trends and popular fashion should be collectively studied for incorporation in the unifying theme.

At the same time it is important that the concept be rich in originality and reflect the traditions and culture of Uruguay.

- d) Fashion Week is likely to become more or less routine after it has been held twice. By three years after the first Fashion Week, that is, by the sixth Fashion Week, the event will face a real danger of sliding into complacency and becoming stale. The mass media may be excited at the beginning but are likely to gradually lose interest in Fashion Week. It is important to constantly review how fresh events and information can be generated and transmitted to renew the interest of the mass media.
- e) Sufficient funds must be raised in order to make Fashion Week successful. Attention must be paid at all times to coordination of efforts to raise funds from all quarters concerned.

4-4-4 An example fashion fair

Details of the fashion fair held every year at Gifu Prefecture, one of the centers of the garment industry in Japan, are as follows :

- 1) Sponsored by : Gifu Fashion Industry Federation Corporation
- 2) Cooperation by : Gifu Prefectural government, Gifu City, Gifu Chamber of Commerce and Industry, unions of the woolen textile, cotton textile and synthetic fiber textile industries, accessory merchants
- 3) Events : Fashion Exhibit Business Meeting (Order taking meeting), fashion show
- 4) Period : 2 days (June 4, 1991 - June 5, 1991)
- 5) Total budget : Yen 100,000,000 (US\$ 800,000)
A breakdown of contributions is shown in Table III-4-5.

Table III-4-5 Breakdown of fashion fair contributions

[Unit : %]

Contribution by		Contribution by	
- Corporations exhibiting at order taking meeting, fashion show	45	- Federation of Gifu fashion industries	20
- Gifu Prefecture	9	- Related industries	8
- Gifu City	11	- Others	7
		Total	100

6) Principal : Principal expenditures of the fashion expenditure items fair are shown in Table III-4-6.

Table III-4-6 Principal expenditure items

[Unit : %]

Items		Items	
- Cost of site decoration	30	- Posters	6
- Fashion show	23	- Personnel costs	3
- Site rental fee	8	- Miscellaneous (gifts etc.)	7
- Pamphlets	8	Total	100

7) Theme : "Depth of creativity" : Consumers in an affluent and mature information society establish their own life styles and new values. Products of high quality and high sensitivity must be proposed. A new point of view focused on the transition from genuineness to essence is critical. The message to be conveyed by products shall be "From superficialities to innerness".

8) Order taking meeting

(1) Participation qualification :

Member corporations of federation and cooperating unions. Manufacturers and trading companies solicited by Fair Executive Committee for exhibition.

(2) Participation fee :

Yen 170,000 (US\$ 1,360) per booth

(3) Booth: W 3.6m X D 3m X H 2.27m

Maximum 2 booth per each company. Location of booth allocated to each company is decided by drawing.

(4) Contract amount :

Target : Yen 20 billion (US\$ 160,000,000)

9) Fashion show :

(1) Participation qualification :

Same as for order entry meeting

(2) Participation fee :

Yen 200,000 (US\$ 1,600) for showing of 4 outfits

(3) Number of fashion shows :

1st day : 3 times, 11am, 2.30pm and 7pm
7pm show is open to the public with entertainment represented.

2nd day : 2 times, 11am, 2.30pm

(4) Exhibit :

Creative items fully demonstrating the personality of exhibiting manufacturers

(5) Fashion models :

4 males and 15 females

10) Pamphlets :

(1) Number issued :

4,000 (all pages in full color)

(2) Composition:

Commentary on fashion trends and marketing viewpoint.
Presentation of exhibitors and exhibiting manufacturers' guide book.

11) Gifts for visitors: For 15 lottery winners - Overseas trip
(Australia - 5 days, 4 stops)
For all visitors- Pre-paid telephone card

4-5 Invitation of Fashion Resource Center

A fashion resource center is evaluated to be a pivotal facility for upgrading the garment industry and promoting its virtues in the U.S.A., Europe and Japan.

Although it would be ideal for a fashion resource center to be established by Uruguay alone, it is more realistic to assume that the fashion resource center is one serving MERCOSUR as a whole and attracted to Uruguay in consideration of the following.

- (1) Utilization of the fashion resource center would very likely be disproportionately small compared to the cost of establishment in view of the small population and small market in Uruguay.
- (2) The degree of international recognition would be enhanced if the fashion resource center served all of MERCOSUR.
- (3) The cost of establishment could be shared by MERCOSUR member countries.
- (4) If overall level of MERCOSUR as a whole can be upgraded, world-wide appreciation for intra-MERCOSUR products can be secured to contribute to the promotion of export. (Simultaneously, competition between four MERCOSUR member countries may aggravate, while such a competition would be beneficial for MERCOSUR as a whole)

However, a precondition for attracting a MERCOSUR fashion center is the consensus of MERCOSUR member countries and hence it must be addressed as part of the medium to long term action program.

4-5-1 Need for and benefits of inviting a MERCOSUR fashion resource center

- (1) Export of garments from not only Asiatic countries but also Eastern European countries, Mid East countries, Mexico and Caribbean countries are increasing rapidly because of their low production costs, resulting in deterioration of the exports of MERCOSUR member countries (hereinafter called "member countries").

At the same time, garment imports are increasing significantly, particularly in Uruguay and Argentina. Member countries must recognize these facts.

- (2) It is imperative for member countries to increase the added value of their garments in order to gain an advantage with respect to non-price competitiveness. Establishment of a fashion resource center as part of the infrastructure for upgrading the textile and garment industries is critical. The fashion resource center should be established at the state level in view of its nature and scale. It would be more advantageous, in view of the cost of construction and operation, to establish a joint MERCOSUR fashion resource center rather than separate fashion resource centers for individual member countries.

- (3) The following are additional benefits to be gained when the fashion resource center is established jointly by member countries.

- 1) Advantages of scale may be secured by integrating information related activities, planning and development of merchandise, and development of human resources, compared to carrying out such activities by member countries or enterprises alone.
- 2) Various functions can be enriched substantially as the scope of activities is broadened.

- 3) Common intra-MERCOSUR problems (export/import, quality, human resources etc.) would surface to strengthen the awareness of solidarity, if the fashion resource center is operated by MERCOSUR.
- 4) Export oriented sample shows would have stronger impact if they are organized by MERCOSUR as a unit.

4-5-2 Details of MERCOSUR fashion resource center

- (1) The establishment of a MERCOSUR fashion resource center and its relation with related institutions and users

Fig. III-4-3 shows the establishment of a MERCOSUR fashion resource center and its relation with related institutions and users.

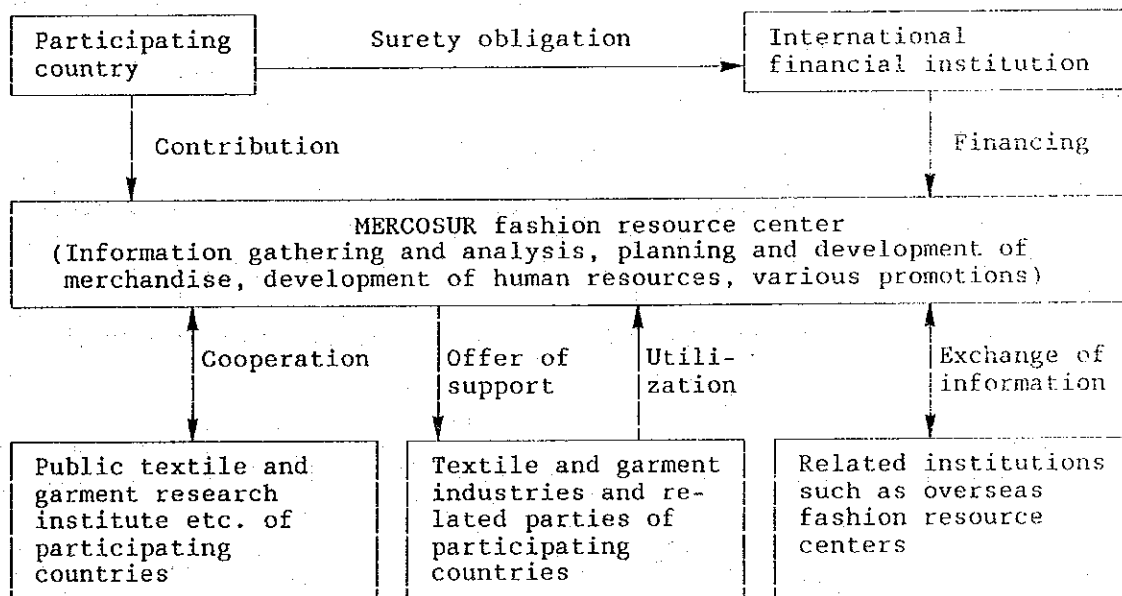


Fig. III-4-3 The establishment of a MERCOSUR fashion resource center and its relation with related institutions and users

(2) Details of activities and principal facilities of the MERCOSUR fashion resource center

Fashion resource centers in other countries are undertaking activities and own facilities as shown in Table III-4-7, Details of activities and principal facilities. The MERCOSUR fashion resource center should develop similar activities and facilities.

Table III-4-7 Details of activities and principal facilities

Function	Details of activities	Principal facilities
Information	<ul style="list-style-type: none"> . Information gathering, analysis and retrieval services . Operation of library . Operation of museum 	<ul style="list-style-type: none"> . Gallery . Library . Museum
Planning and development of merchandise	<ul style="list-style-type: none"> . Provision of the results of development including design software . Installation of high technology equipment 	<ul style="list-style-type: none"> . CAD, high technology sewing machine etc.
Development of human resources	<ul style="list-style-type: none"> . Organization of seminars 	<ul style="list-style-type: none"> . School room
Promotion	<ul style="list-style-type: none"> . Organization of exhibitions . Invitation of overseas exhibitions . Room rental business 	<ul style="list-style-type: none"> . Exhibition hall (large, medium) . Rental conference room

4-5-3 Reasons for inviting MERCOSUR fashion resource center to Uruguay

Establishment and invitation of MERCOSUR fashion resource center supporting information analysis, planning and development of merchandise, development of human resources and various promotions would definitely serve to strengthen merchandise planning capacity and to expand exports. However, should it turn out that quality improvement and cost reduction are not achieved despite the efforts of garment enterprises, CIV, PIU and concerned government agencies, Uruguayan garment enterprises may find it possible to survive by opting for a path leading to becoming converters as a part of their diversification programs. Under such circumstances,

invitation of a fashion resource center having the above mentioned functions to Uruguay would have extremely high significance. Therefore, Uruguay should take the lead and exercise its initiative in attracting the fashion resource center.

4-5-4 Establishment of the committee in charge of preparation for the invitation of a MERCOSUR fashion resource center

Invitation of a MERCOSUR fashion resource center is an effective means for export promotion in the future, as well as a valuable resource should enterprises exercise the option of becoming converters. Accordingly, the concerned government agencies (Ministry of Industry, Ministry of Economy and Finance), PIU and CIV should organize a committee in charge of preparing for attraction of such a center in order to take the lead in planning concepts for its establishment and invitation.

4-5-5 Business of the preparation committee for invitation

In order to become recognized throughout the international market as the Latin American fashion resource center in the 21st century, the fashion resource center must ultimately be equipped with a data base structured to collect, arrange and process an enormous volume of data, and supporting development of a thesaurus. The fashion resource center must also be equipped to support product planning and development, development of human resources and various promotional activities. The establishment preparation committee should be the following in order to bring a fashion resource center of such enormous scale to Uruguay.

- 1) European and American fashion resource centers should be thoroughly surveyed and studied in order to formulate a concrete conception of the MERCOSUR fashion resource center of the future.

- 2) The structure of the system for collecting garment industry related information in a data base, and methods for developing a thesaurus must be designed and implemented. The cooperation of the Universidad de la Republica should be solicited for assistance in building the information system, which will serve as the hub of the fashion resource center. To begin with, the information system and data base must handle the collection of information about materials, technology and markets for fabrics and garments including knits on a relatively small scale. However, if the information system and data base are to handle information covering the garment industry as a whole, including auxiliary materials or woolen textiles or leather goods as well, the scale of the system would have to be enormous even for Uruguay only.
- 3) At a certain intermediate stage, for example when the data base has been built and data input is ready to begin, the concept of a MERCOSUR fashion resource center should be made known to the other three MERCOSUR member countries for study by all member countries. If Uruguay has succeeded at that time in preceding the other member countries in steps 1) and 2) above, Uruguay should be able to exercise sole leadership in promotion of the concept.
- 4) The preparation committee should represent Uruguay on the MERCOSUR fashion resource center establishment committee, and should continue to conduct business as summarized in item 2) above.
- 5) MERCOSUR fashion resource center establishment committee
 - . The committee should consist of the respective preparation committees from the four MERCOSUR member countries.
 - . Principal business of the MERCOSUR fashion resource center establishment committee

The committee should study not only facility construction and financing as needed, but also, more importantly, how to educate and secure the necessary human resources to ensure that the fashion resource center fulfills its functions fully and operates smoothly.

a) Fashion data base

An enormous volume of data would have to be arranged and processed for easy access in order to provide information to the MERCOSUR garment industry in a convenient and useful way. The fashion related data base must be structured as promptly as possible. An urgent need exists to develop a thesaurus which is easy to use by the garment industry in order to build a data base out of fashion related information left unarranged. If structuring of the data base and development of the needed thesaurus are ignored, the simultaneous use of information within MERCOSUR will not be possible. The necessary personnel must be educated and secured beforehand.

b) Arrangement of available information

A massive injection of human resources will be required for the information system along dimensions other than just setting up computer systems. The survey to locate information sources will depend vitally upon the available manpower; considerable human resources will be needed until the system can be put into its planned orbit. If collection and arrangement of information, including this survey, is neglected, the data base will be of inferior quality. Among other tasks, the collection and analysis of swatches (sample pieces of fabric) will depend greatly upon how many qualified specialists can be secured.

c) Education and training of merchandisers

The fashion resource center must be equipped for product planning and development. The education and training of

competent merchandisers will be necessary.

- 3) Study of fashion resource center steering policy
 - 4) Study of fund raising needed for establishment (including borrowing from international financing institutions, contribution of member countries, etc.)
- (6) Example fashion resource centers

The Musee des Decoratifs and Musee des Arts de la Mode of Paris, France, the Victoria & Albert Museum of London, U.K., and F.I.T. (Fashion Institute of Technology) of New York, U.S.A are all well known fashion resource centers that are extensively utilized. Because all of these fashion resource centers are of long standing, the relatively new Ichinomiya Fashion Design Center (referred to as IFDC hereinafter) located in Ichinomiya city, Aichi Prefecture of Japan is presented below as an example of a new fashion resource center.

1) Objective of IFDC

How to transcend conventional values and tackle esthetic and information issues within a new social system characterized by changing economic structures, development of an information oriented society and maturing consumers has surfaced as a new challenge to the textile industry. A new resource to serve as a strong point was thought necessary to respond to these changes, so consequently, IFDC was established on the site of Aichi Prefecture Owari Textile Technology Center located in Ichinomiya City, one of the centers of the traditional textile industry.

2) Outline of IFDC building

- (1) Opened February, 1984

(2) Building construction Reinforced concrete, 4 stories

(3) 3,099.13 m²

(4) Principal facilities

1F : Permanent display hall, exhibition hall, office,
guest room, canteen

2F : Conference room No. 1, conference room No. 2,
consultation room

3F : Commodity development room, library, information
processing room, archives

(5) Construction cost Yen 1,050 million (US\$ 5.25 million
converted at Yen 200/US\$ which is an exchange rate in
1984)

(6) Source of construction

Subsidies of national fund government and Prefectural
government, financing by Small Business Promotion
Corporation and Prefectural government, contributions by
24 cities, townships and villages as well as industrial
associations.

3) Functions and objectives of IFDC

(1) Collection and proffering of fashion and marketing
related information

(2) Development of new commodities and exploitation of
markets

(3) Development of human resources

4) Management of IFDC

(1) Promotional undertaking

. Collection and proffering of information :

Publication of "Textile & Fashion" magazine.
Publication of "Seasonal textile Planning" news letter.

. Promotion of exhibitions :

Organization of textile collection (twice per year in September and March).

. Development of new commodities :

Development of new commodities based on marketing information and new technology.

. Development of human resources :

Merchandising seminar (8 times per year)
Fashion management seminar (twice per year)
Textile trend seminar (twice per year) and so on.

. Regional exchange undertaking :

Kettle dyeing class, hand weaving class.

(2) Promotion of commissioned undertakings

. Implementation of undertakings commissioned by related industries and by cities/townships/villages ;

Association with overseas designers.
Participation in Japan Wool Fair etc..

(3) Promotion of facility rental undertakings

Rental of display hall, conference rooms, audio-visual facilities and study and training rooms is promoted in order to encourage exhibitions and conferences pertinent to the promotion of local industries.

(4) Membership fee

As of now, approximately 700 corporations (including individuals and groups) are registered as IFDC members. Annual membership fee is Yen 15,000 (US\$ 120 at Yen 125/US\$ exchange rate)

(5) Income and expenditures of IFDC

The proportions of income and expenditures represented by IFDC's five major sources of income and expenditure are as shown in Table III-4-8. On the income side, costs shared by member enterprises, subsidy income and service fee income rank high, while the cost of collecting information and publishing a specialty magazine ("Textile & Fashion") and the cost of commissioned undertakings are high on the expenditure side. Total annual expenditure is about US\$ 1,472,000.

Table III-4-8 IFDC's five major income and expenditure items

Income items		Expenditure items	
Subsidy income	11%	Personnel	10%
Cost sharing, aid income	44%	Building maintenance	14%
Income from commissioned undertakings	19%	Collecting and circulating information	27%
Facility lease fee	6%	Exhibitions and promotional undertakings	12%
Seminar participation fees	7%	Commissioned undertakings	19%
Other income	12%	Other expenditures	18%
Total	100%	Total	100%

IFDC is contributing to the development of not only regional but also nationwide textile and garment industries through gathering and analysis of information, development of merchandise, development of human resources and promotion of exhibitions.

Problems were extracted to be addressed and the reasons therefore, and presented reform measures in PART III.

PART IV CONCLUSIONS AND RECOMMENDATIONS

The reform measures are recommended in order to promote Uruguayan garment industry after grasping the problems identified. It is a purpose to draft a master plan for realizing the reform measures which enterprises, associations and government agencies carry out in cooperation with one another. Three field studies involving visits to Uruguayan enterprises, hearings for concerned institutions, and collection of relevant materials were implemented.

The results of the study, as well as problems identified in promoting the Uruguayan garment industry and recommendations based thereon, are presented hereunder.

1. Results of the study

- (1) Although exports of Uruguayan garments continued to increase up until 1989, they have been stagnant, in particular exports to the U.S.A., due to the emergence of rapidly developing garment industries in Asian and Caribbean countries. Based on the results of the study, the problems are identified and the following reform measures are recommended.
- (2) One problem identified is that there are limits to the effectiveness of independent efforts by the garment industry, but there is no system to encourage the cooperation of industrial associations and concerned government agencies. Nevertheless, cooperation among enterprises, associations and concerned government agencies is indispensable for the promotion of the Uruguayan garment industry. The following reform measures are recommended to promote cooperation among these parties. Out of 19 items, 12 reform measures were summarized. They were narrowed down to the 5 items for considered most realistic, and those measures were finally selected for the action program to be implemented.

2. Recommendations

Based on the current status of the Uruguayan garment industry and its problems that need to be addressed, the following recommendations are presented for consideration.

- (1) Executives must extricate themselves from the subcontracted processing trade and recognize that what is most needed now is to establish a system capable of producing high value added products in small lots of wide variety within the shortest possible delivery period. They must seriously concern themselves with global garment and fashion trends and must have independent product planning capacity. They have to actively participate in overseas fashion fairs and engage in sales promotion activities. Enterprises must implement production control thoroughly and must be rationalized while the will to work of employees must be elevated. Executives themselves must participate in various seminars for study and training.
- (2) The cooperation within the industry needed to produce high value added products and reduce costs must be actively promoted by enlisting the cooperation of the associations and government. Promotion of cooperation within the industry is critical with regard to the need for expensive high technology equipment to produce high value added products in small lots of wide variety within the shortest possible delivery period. Also, joint procurement, storage and distribution of raw materials and subsidiary materials is needed to reduce costs.

In addition, efforts must be made to reduce costs of raw materials and to improve quality by means of establishing and maintaining close contact with the Asociacion de Industrias Textiles del Uruguay, and Uruguayan designers and Uruguayan tailors through the arrangement of the associations and government agencies.

- (3) The associations need to intensify cooperation with concerned government agencies and circulate information they have collected to business enterprises in order to support the sales activities of those enterprises. In particular, joint participation in overseas fashion fairs should be arranged in case individual enterprises are unable to participate.

It is also necessary that seminars on management concepts and the elevation of productivity be organized, and that a cooperative approach is taken to improving labor relations, including provision of incentives for the acquisition of public qualifications, in order to develop human resources for the garment industry as a whole.

Furthermore, the associations must exercise their leadership in order to play a central role in the preparation of a collection of commonly used techniques in the public domain by enlisting the cooperation of enterprises and concerned government agencies.

- (4) The government must prepare and immediately institute a quality labeling system, by nominating LATU as the institution in charge of implementation.

Merchandisers are key staff who will be indispensable to garment enterprises in the near future. It is, therefore, of an urgent necessity to foster merchandisers. Merchandising related courses must be included in the curriculum of UTU by studying overseas examples, and UTU's equipment facilities must be expanded immediately.

Implementation of state level fashion events in Uruguay would allow Uruguayan garment enterprises to make contacts with overseas buyers. This is particularly significant for Uruguayan garment enterprises who are not able to participate in overseas Fashion Week by themselves. Preparation and organization of such Fashion Week must include cooperation of the associations and enterprises.

Although the Uruguayan government takes the stance of not supporting any specific industry, it should be remembered that many countries where the garment industry is newly emerging are implementing substantial export promotion policies in order to protect their garment industries. The industrial policy of the Uruguayan government must progress hand in hand with Uruguayan industries. It would be highly important for Uruguayan industry to establish an institution to be organized jointly by the public and private sectors for the promotion of foreign trade (for example, an institution similar to Japan External Trade Organization (JETRO)). The institution would promote quick and appropriate expansion of export trade by carrying out overseas market studies and organizing sample fairs. It is believed that such an institution would contribute to the promotion of the garment industry, thus early implementation is desirable. It must be kept in mind however, that to establish such an institution is time consuming and would require prudent preparations. Efforts are also needed to review and reduce tax to a level comparable with other MERCOSUR member countries.

- (5) When viewed from the medium and long term points of view, to invite a fashion resource center serving the entire textile industry, including the garment segment, and jointly organized with other MERCOSUR countries, to locate in Uruguay would be most significant in terms of elevating the level of enterprises within MERCOSUR, including those of Uruguay.

In view of the time and enormous cost involved however, the Uruguayan government should initiate as soon as reasonably possible the preparations required for establishment and invitation of MERCOSUR fashion resource center.

**DATA AND INFORMATION
AND
APPENDICES**

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- VIII. Fashion Resource Center in Europe and U.S.A.

DATA & INFORMATION

I. Members List of the Study Team

NAME	ASSIGNMENT
Mr. Mayuki TAKENO	Team Leader
Mr. Satoru MASANO	Sub-Leader, Industrial Development Plan
Mr. Hideaki TAKAHASHI	Industrial Development Plan Market Analysis
Mr. Shigeaki FUKUNAGA	Business management (Wool wear)
Mr. Satoru FUJIKAKE	Business management (Knit wear)
Mr. Hiroshi HARAKAWA	Business management (Denim wear)
Mr. Kunio SHIMAZAKI	Production Technology (Wool wear)
Mr. Hiraku WADA	Production Technology (Knit wear)
Mr. Makoto WAKIMOTO	Production Technology (Denim wear)
Mr. Yoichi MIYAMURA	Sub-Leader, Market Analysis

DATA & INFORMATION

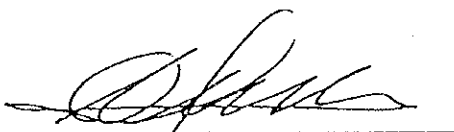
II. Minutes of Meeting

i. Minutes of Meeting 19 July 1991

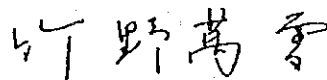
MINUTES OF MEETING
FOR
THE STUDY
ON
GARMENT INDUSTRY DEVELOPMENT PROGRAM
IN
THE ORIENTAL REPUBLIC OF URUGUAY

AGREED UPON BETWEEN
MINISTRY OF INDUSTRY, ENERGY AND MINING
AND
JAPAN INTERNATIONAL COOPERATION AGENCY

MONTEVIDEO, 19 JULY, 1991



MR. ALBERTO IGLESIAS
DIRECTOR
NATIONAL INDUSTRIAL DIRECTION
MINISTRY OF INDUSTRY, ENERGY
AND MINING



MR. MAYUKI TAKENO
LEADER
THE JAPANESE STUDY TEAM
JAPAN INTERNATIONAL COOPERATION
AGENCY

The Uruguayan Group consisting of Ministry of Industry, Energy and Mining, Camara Industrial de la Vestimenta and Punto Industrial Uruguayo (hereinafter referred to as " The Counterpart ") and The Japanese Study Team for The Study on Garment Industry Development Program in The Oriental Republic of Uruguay (hereinafter referred to as " The Team ") sent by the Japan International Cooperation Agency agreed on the following items mentioned-below after mutual discussion based on the results of Field Work (I) in Uruguay described in the Inception Report (I).

The lists of members of The Counterpart and The Team are attached to Annex 1 and 2 respectively.

1. The Team explained the Inception Report(I) and The Counterpart admitted the content and the procedure.

2. Selection of Model Enterprises

The Team could visit almost all of the candidated enterprises by the good arrangement of The Counterpart and could collect the relevant data and information. As to the model enterprises to be studied in Field Work(II), the both sides, The Counterpart and The Team, selected 14 (fourteen) enterprises from the candidated ones and/or recommended ones by The Counterpart. The list of the name of the selected 14 enterprises is shown in Annex 3.

3. Selection of Three countries for Market Study Outside Uruguay

As to three countries where market study shall be implemented, the both sides selected U.S.A., Germany, Spain from 7 (seven) countries nominated by The Counterpart as promising countries for exportation of Uruguayan apparel products.

4. The schedule onward shall be executed under the Inception Reprt (I).

On approving the above mentioned, the representatives of the both sides shall sign herewith in this paper.

Annex 1.

MEMBERS LIST OF THE COUNTERPART

NAME	TITLE
------	-------

MINISTERIO DE INDUSTRIA Y ENERGIA

Sr. Alberto Iglesias	Director Nacional de Industrias
Sr. Ernesto Medina	Subdirector Centro Desarrollo Industrial
Sra. Yanina Corsini	Experta en Economia Industrial
Sr. Martin Fernandez	Experto en Acuerdos Comerciales

CAMARA INDUSTRIAL DE LA VESTIMENTA

Sr. Julio R. Mannocci	Gerente
Sr. Luis Chaparro	Experto en Economia Industrial
Sra. Isolina Pereira	Experta en Tecnologia Industrial

PUNTO INDUSTRIAL URUGUAYO

Sr. Fernando Camadini	Secretario Camara de Punto
-----------------------	----------------------------

(WT)

J

MEMBERS LIST OF THE STUDY TEAM

NAME	ASSIGNMENT
Mr. Mayuki TAKENO	Team Leader
Mr. Satoru MASANO	Sub-Leader, Industrial Development Plan
Mr. Hideaki TAKAHASHI	Industrial Development Plan Market Analysis
Mr. Shigeaki FUKUNAGA	Business management (Wool wear)
Mr. Satoru FUJIKAKE	Business management (Knit wear)
Mr. Hiroshi HARAKAWA	Business management (Denim wear)
Mr. Kunio SHIMAZAKI	Production Technology (Wool wear)
Mr. Hiraku WADA	Production Technology (Knit wear)
Mr. Makoto WAKIMOTO	Production Technology (Denim wear)
Mr. Yoichi MIYAMURA	Sub-Leader, Market Analysis

(27)

J

Annex 3.

The list of the name of the selected 14 enterprises

a) Camara Industrial de la Vestimenta

- Wool wear

Dymac S. A.

El Mago S. A

Sidex S. A.

Osami S. A.

Sirfil S. A.

- Denim wear

Martex S. A.

Rensa Ltda.

Tom Mix S. A.

Lycon S. A.

b) Punto Industrial Uruguayo

- Knit wear

COMEX S. A.

WOOLART URUGUAY

ANZATEX LTDA.

MANOS DEL URUGUAY

LA SUIZA

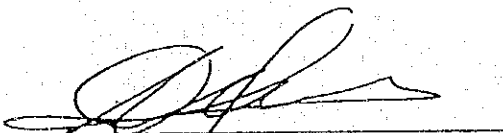
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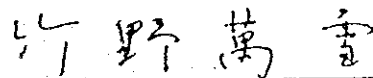
MINUTES OF MEETING
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AGREED UPON BETWEEN
MINISTRY OF INDUSTRY, ENERGY AND MINING
AND
JAPAN INTERNATIONAL COOPERATION AGENCY

MONTEVIDEO, 6 NOVEMBER, 1991



MR. ALBERTO IGLESIAS
DIRECTOR
NATIONAL INDUSTRIAL DIRECTION
MINISTRY OF INDUSTRY, ENERGY
AND MINING



MR. MAYUKI TAKENO
LEADER
THE JAPANESE STUDY TEAM
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The lists of members of The Counterpart and The Team are attached to Annex 1 and 2 respectively.

1. The Team explained the Inception Report(II) and The Counterpart admitted the content and the procedure.
2. The Team implemented the following items under cooperation of The Counterpart.
 - i) Detail study on all of the model enterprise which both sides, The Counterpart and The Team, selected in the Field Work (I)
 - ii) Visits to the governmental organizations, the associations, and the firms concerned with the Study.
 - iii) An exchange of opinions with The Counterpart regarding export promotion of Uruguayan garment products.
3. The Team utilizes the knowledge, information and data collected by the above study and discussion for making an Interium Report.
4. The Team prepared a Progress Report, which is attached to this Minutes of Meeting.
5. The Team recommended Exlan S.A. instead of Woolart Uruguay as one of the model enterprises in a knit wear industry and The Counterpart agreed to the change.

On approving the above mentioned, the representatives of both sides shall herewith sign this paper.

MEMBERS LIST OF THE COUNTERPART

NAME	TITLE
------	-------

MINISTERIO DE INDUSTRIA Y ENERGIA

Sr. Alberto Iglesias	Director Nacional de Industrias
Sr. Ernesto Medina	Subdirector Centro Desarrollo Industrial
Sra. Yanina Corsini	Experta en Economia Industrial
Sr. Martin Fernandez	Experto en Acuerdos Comerciales

CAMARA INDUSTRIAL DE LA VESTIMENTA

Sr. Julio R. Mannocci	Gerente
Sra. Isolina Pereira	Experta en Tecnologia Industrial
Sra. Maria I. Terra	Licenciada en Economia

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PUNTO INDUSTRIAL URUGUAYO

Sr. Fernando Canadini	Secretario Camara de Punto
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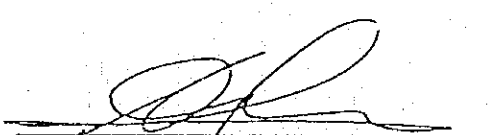
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Mr. Makoto WAKIMOTO	Production Technology (Denim wear)
Mr. Yoichi MIYAMURA	Sub-Leader, Market Analysis

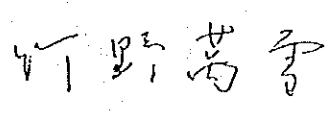


MINUTES OF MEETING
FOR
THE STUDY
ON
GARMENT INDUSTRY DEVELOPMENT PROGRAM
IN
THE ORIENTAL REPUBLIC OF URUGUAY
AGREED UPON BETWEEN
MINISTRY OF INDUSTRY, ENERGY, AND MINING
AND
JAPAN INTERNATIONAL COOPERATION AGENCY

MONTEVIDEO, 10 JULY, 1992



MR. ALBERTO IGLESIAS
DIRECTOR
NATIONAL INDUSTRY DIRECTION
MINISTRY OF INDUSTRY,
ENERGY AND MINING



MR. MAYUKI TAKENO
LEADER
THE JAPANESE STUDY TEAM
JAPAN INTERNATIONAL
COOPERATION AGENCY

The Uruguayan group consisting of Ministry of Industry, Energy and Mining, Camara Industrial de la Vestimenta and Punto Industrial Uruguayo (hereinafter referred to as "The Counterpart") and The Japanese Study Team for The Study on Garment Industry Development Program in The Oriental Republic of Uruguay (hereinafter referred to as "The Team") sent by the Japan International Cooperation Agency agreed on the following items after mutual discussion on the Interim Report.

The lists of the members of The Counterpart and The Team are attached to Annex 1 and 2 respectively.

1. The Team explained the Interim Report and The Counterpart admitted the contents and the procedure to the draft final report.

2. The Team agreed to respect views or opinions of The Counterpart with regard to the proposals which The Team submitted to The Counterpart in the Interim Report in order to improve the present situation of Uruguayan garment and/or apparel industry and the Team will submit a Draft Final Report at October, 1992, considering these views and opinions.

3. The Team could carry out the necessary complementary study without a hitch by getting a nice cooperation of The Counterpart and gather fruitful data and information which The Team would like to utilize in a Draft Final Report.

On approving the above mentioned, the representatives of the both parties shall sign herewith in this paper.

Annex 1.

MEMBERS LIST OF THE COUNTERPART

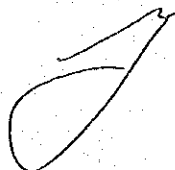
NAME	TITLE
<u>MINISTERIO DE INDUSTRIA, ENERGIA Y MINERIA</u>	
Sr. Alberto Iglesias	Director Nacional de Industrias
Sr. Ernesto Medina	Subdirector Centro Desarrollo Industrial
Sr. Octavio Gioia	Asesor

CAMARA INDUSTRIAL DE LA VESTIMENTA

Sr. Julio R. Mannocci	Gerente
Sra. Isolina Pereira	Experta en Tecnologia Industrial
Sra. Maria I. Terra	Licenciada en Economia

PUNTO INDUSTRIAL URUGUAYO

Sr. Miguel Korytnicki	Presidente
Sr. Julio A. Franco	Asesor



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Annex 2.

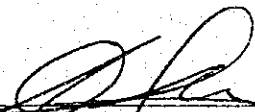
MEMBERS LIST OF THE STUDY TEAM

NAME	ASSIGNMENT
Mr. Mayuki Takeno	Team Leader
Mr. Satoru Masano	Sub-Leader, Industrial Development Plan
Mr. Hiroshi Harakawa	Business Management (Denim wear)
Mr. Kunio Shimazaki	Production Technology (Wool wear)
Mr. Kenichi Hayakawa	JICA Coordinator

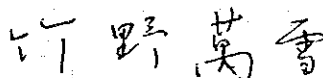


MINUTES OF MEETING
FOR
THE STUDY
ON
GARMENT INDUSTRY DEVELOPMENT PROGRAM
IN
THE ORIENTAL REPUBLIC OF URUGUAY
AGREED UPON BETWEEN
MINISTRY OF INDUSTRY, ENERGY, AND MINING
AND
JAPAN INTERNATIONAL COOPERATION AGENCY

MONTEVIDEO, 13 November, 1992



MR. ALBERTO IGLESIAS
DIRECTOR
NATIONAL INDUSTRY DIRECTION
MINISTRY OF INDUSTRY,
ENERGY AND MINING



MR. MAYUKI TAKENO
LEADER
THE JAPANESE STUDY TEAM
JAPAN INTERNATIONAL
COOPERATION AGENCY

The Uruguayan group consisting of Ministry of Industry, Energy and Mining, Camara Industrial de la Vestimenta and Punto Industrial Uruguayo (hereinafter referred to as "the Counterpart") and The Japanese Study Team for The Study on Garment Industry Development Program in the Oriental Republic of Uruguay (hereinafter referred to as "the Team") sent by the Japan International Cooperation Agency agreed on the following items after mutual discussion on a Draft Final Report.

The lists of the members of The Counterpart and The Team are attached to Annex 1 and 2 respectively.

1. The Team explained the Draft Final Report and the Counterpart admitted the contents and the procedure to the Final Report.
2. The Team respects views or opinions of the Counterpart with regard to the recommendations and proposals which the Team has described in the Draft Final Report.
3. The Team will undertake the tasks of modifying the items which are agreed by both parties, the Counterpart and the Team, and will submit a Final Report to the Counterpart in December, 1992.

Both parties have decided not to open the Final Report and other reports concerned on the garment industry development program in the Oriental Republic of Uruguay to the public including National Diet Library, JICA Library and any other libraries in Japan until the end of 1995.

On approving the above mentioned, the representatives of the both parties shall sign herewith in this paper.

Annex 1.

MEMBERS LIST OF THE COUNTERPART

<u>NAME</u>	<u>TITLE</u>
<u>MINISTERIO DE INDUSTRIA, ENERGIA Y MINERIA</u>	
Sr. Alberto Iglesias	Director Nacional de Industrias
Sr. Ernesto Medina	Subdirector Centro Desarrollo Industrial
Sr. Octavio Gioia	Asesor
Sra. Yanina Corsini	Experta en Economia Industrial

CAMARA INDUSTRIAL DE LA VESTIMENTA

Sr. Julio R. Mannocci	Gerente
Sra. Maria I. Pereyra	Experta en Tecnología Industrial
Sra. Maria I. Terra	Licenciada en Economia

PUNTO INDUSTRIAL URUGUAYO

Sr. Miguel Korytnicki	Presidente
Sr. Julio A. Franco	Asesor

Annex 2.

MEMBERS LIST OF THE STUDY TEAM

NAME	ASSIGNMENT
Mr. Mayuki Takeno	Team Leader
Mr. Satoru Masano	Sub-Leader, Industrial Development Plan
Mr. Kunio Shimazaki	Production Technology (Wool wear)
Mr. Keiji Mashimo	JICA Coordinator



(47)

DATA & INFORMATION

III. List of Data Collected

i. Data collected in Uruguay

S: Spanish E: English J: Japanese

No.	Source	Name of Data	Language
1.	EMBAJADA DEL JAPON	1-1 CHARACTERISTICS OF URUGUAYAN ECONOMY (JUNE 30, 1991)	J
		1-2 URUGUAY INVESTMENT SYSTEM	E
2.	MINISTERIO DE INDUSTRIA, ENERGIA Y MINERIA	2-1 INDICADORES MENSUALES DE ACTIVIDAD	S
		2-2 INGRESOS, EGRESOS Y RESULTAD FINANCIERO DEL GOBIERNO CENTRAL	S
		2-3 INDICE DE PRECIOSAL CONSUMO	S
		2-4 TASA DE ACTIVIDAD, EMPLEO Y DESEMPLEO	S
		2-5 INDICADORES MENSUALES DE ACTIVIDAD	S
3.	MINISTERIO DE ECONOMIA Y FINANZAS	3-1 TEXTILES CUOTAS U.S.A.	S
	DIRECTION GENERAL DE	3-2 EXPORTACION: PRODUCTO-PAIS	S
	COMERCIO EXTERIOR	3-3 PRENDAS EXTERIORES DE PUNTO	S
4.	DIRECTOR NACIONAL DE ARTESANIAS, PEQUENAS Y MEDIANAS EMPRESAS (DINAPYME)	4-1 EL SENADO Y LA CAMARA DE REPRESENTANTES DELA REPUBLICA ORIENTAL DEL URUGUAY REUNIDOS EN ASAMBLEA GENERAL DECRETAN	S
5.	DIRECCION DE DEFENSA DEL CONSUMIDOR Y CONTRALOR DEL MERCADO	5-1 PUBLICACION LA AGENDA DEL CONSUMIDOR	S

No.	Source	Name of Data	Language
6.	CAMARA INDUSTRIAL DE LA VESTIMENTA	6-1 SUL (SECRETARIADO URUGUAYO DE LA LANA) STATISTICAL DATA ON WOOL/ WOOLEN GARMENT, OTHER LITERATURE AND DOCUMENTS IN JAPANESE LANGUAGE	S
		6-2 ARGENTINA LISTA DE EXCEPCIONES	S
		6-3 MERCOSUR, LISTA DE EXCEPCIONES	S
		6-4 LA INDUSTRIA URUGUAYA DE LA VESTIMENTA EXTERIOR DE TEJIDOS, PLANOS: SU IN SERCION EXTERNA (1978-1990) (SRA, MARIA I. TERRA)	S
		6-5 IMPORT STATISTICS	S
7.	BANCO DE LA REPUBLICA ORIENTAL DEL URUGUAY	7-1 NOMENCLATURE ARANCELARIA DE EXPORTACION	S
8.	CAMARA DE INDUSTRIAS	8-1 MEMORIA Y BALANCE - EJERCICIO 1990-1991	S
9.	ASOCIACION DE INDUSTRIAS TEXTILES DEL URUGUAY	9-1 ASOCIACION DE INDUSTRIAS TEXTILES DEL URUGUAY OBRERO TEXTILE	S

No.	Source	Name of Data	Language
10.	LATU(LABORATORIO TECNOLOGICO DEL URUGUAY)	10-1 REVISTA DEL SEMINARIO INTERNACIONAL SOBRE DESARROLLO DE LA INDUSTRIA EN PEQUENA ESCALA DE PULPA DE CELULOSA Y PAPEL, OTHER LITERATURE AND DOCUMENTS IN JAPANESE LANGUAGE	S
		10-2 LEGISLATION OF SYSTEMIZATION OF QUALITY MARKING	
11.	UNIT(INSTITUTO URUGUAYO DE NORMAS TECNICAS)	11-1 CATALOG 1986, OTHER LITERATURE AND DOCUMENTS IN JAPANESE LANGUAGE	
		11-2 STANDARDIZATION OF PAPER, MACHINERY, ETC. OTHER LITERATURE AND DOCUMENTS IN JAPANESE LANGUAGE	
12.	CENTRO DE DESENO INDUSTRIAL	12-1 CENTRO ANALISI SOCIALE	S
		12-2 ENCUENTRO-NACIONAL DE ARTE TEXTILE	S
13.	CENSI	13-1 IMPORTACION-EXPORTACION 1990, URUGUAY	S
14.	ZONA FRACAS	14-1 URUGUAY A NEW GATE TO THE WORLD, FREE ZONE LAW NO. 15.921	E
		14-2 GUIA PARA PRESENTACION DE UNA PROPUESTA DE INVERSION	S
15.	ZONA FRANCA MONTEVIDEO S.A. (ZFM)	15-1 GUIDEBOOK, BROCHURE OF ZFM	E

No.	Source	Name of Data	Language
16.	SAO PAULO	16-1 CARTA TEXTIL	S
		16-2 BRAZILIAN TEXTILE TARIFFS	S
17.	IEMI, INSTITUTO DE ESTUDOS E MARKETING INDUSTRIAL	17-1 LEVANTAMENTO ESTRUTURAL DA INDUSTRIA CONFECCIONISTA BRASILEIRA-1988	S

ii. Data Collected in Japan

No.	Source	Name of Data
1.	Small and Medium Enterprises Agency	[(Survey in fiscal 1989) Management indices of small and medium enterprises] K.K. Doyukan, 1990
2.	Small and Medium Enterprises Agency	[(Survey in fiscal 1989) Cost indices of small and medium enterprises] K.K. Doyukan, 1990
3.	Masayuki Yoshioka	[(Nikkei Industrial Series) Textile] Nihon Keizai Shimbun, 1986
4.	Akira Nakamura	[(Commodity Industry Series) Factual knowledge on textiles, 6th edition] Toyo Keizai Shinpo, 1980
5.	Kisho Akazawa	[Future strategies of Renown fashion] Japan Management Association, 1990
6.	Takeshi Shiizuka	[Apparel industry, New age of DC brand], K.K. Business, 1987
7.	JETRO	[JETRO sensor, August issue] Japan External Trade Organization 1991
8.	VARIG BRAZIL Airlines	[Brazil Information], 1991 Public Relations Department
9.	Textile Industry Structural Reform Projects Association Textile Information Center	[Apparel Handbook - 1990 edition]

No.	Source	Name of Data
10.	Edited and published by: Textile Industry Structural Reform Projects Association Textile Information Center	[Current status and tasks of information systems in textile industry], 1987
11.	Textile Industry Structural Reform Projects Association	[Seminar (Current status of the research and development of automatic sewing system) Text] 1983
12.	Textile Industry Structural Reform Projects Association	[Apparel merchandising II, High sensitivity product planning] 1988
13.	Textile Industry Structural Reform Projects Association	[Information on well-selling apparel (Trends in consumer apparel purchases) No.157], 1991
14.	Textile Industry Structural Reform Projects Association	[Apparel study 5, 6, 12, 14], 1986
15.	Textile Industry Structural Reform Projects Association	[Apparel production management I] 1991
16.	Textile Industry Structural Reform Projects Association	[Apparel sales management], 1984
17.	Textile Industry Structural Reform Projects Association	[Apparel sales strategy], 1984

No.	Source	Name of Data
18.	Quadrilingual Fashion Glossary Editing Committee	[Quadrilingual Fashion Glossary] C. Itoh Fashion System Corp., 1989
19.	Japan Textile Import Union	[Graphic transition of textile product imports - 1989 year round edition (January through December)] 1989
20.	Japan Textile Center	[All about textile product quality labeling system]
21.	Mikio Urawa	[Economic Spanish Language Dictionary], K.K.Hakusuisha
22.	International Cooperation Promotion Foundation	[Status quo of Economic Community in The Oriental Republic of Uruguay]
23.	Prohibida la Comercializacion	[BANCO DE SEGUROS DEL ESTADO Almanague 1990]
24.	Guid de Montevideo	[Eureka], 1990
25.	BARREIRO Y RAMOS EDITORES	[URUGUAY EN IMAGENES]
26.	BOLETIN ESTADISTICO N° 117-Febrero/90	[BANCO CENTRAL DEL URUGUAY]
27.	ISO	ISO-3758 [Textile-Care labelling code using symbols]
28.	MITI	[The Household Goods Quality Labelling Law]

DATA & INFORMATION

IV. List of Visiting Place

1. Governmental Organization

- (1) Embajada del Japon
Br. Artigas 953, Montevideo
Embajador Sr. Haruyuki MABUCHI
- (2) Ministerio de Industria, Energia y Minería, Dirección Nacional de Industrias
Sarandi 690 D 2. EP., Montevideo
- (3) Ministerio de Economía y Finanzas, Dirección General de Comercio Exterior
- (4) Banco de la República Oriental del Uruguay
Sr. Roberto M. Siri Gerente
- (5) Banco Central del Uruguay
Av. Fabini 777, Montevideo
Sr. Daniel E. Vaz Gerente
- (6) Centro Nacional de Tecnología y Productividad Industrial
- (7) Centro de Orientación al Consumidor
Avda. 18 DE JULIO 2041
Nilsa Rodons
- (8) Comisión Sectorial para el Mercado Común del Sur (MERCOSUR)
Paysandu 919 11, 100, Montevideo
Sr. Jorge Sienra, Director
- (9) Director Nacional de Artesanías, Pequeñas y Medianas Empresas (DINAPYME)
Rincon 723, Montevideo
Dr. Alejandro V. Nader
- (10) Director Nacional de Trabajo
Juncal 1511, Montevideo
Dr. Gonzala Trrazabal Buquet
- (11) Dirección de Defensa del Consumidor y Contralor del Mercado
- (12) Zona Diaz 996, Montevideo
Sr. Luis P. Loustau, Sub Director
- (13) Ministerio de Relaciones Exteriores
Colonia 1206, Montevideo
Dra. Zulma Guelman

(14) Ministry of Education & Culture
Soriano 1045, Montevideo
Director Nacional de Educacion Publica
Dr. J. A. Gabito

2. Governmental Research Institutions and Schools

(1) Centro de Deseno Industrial (CDI)

Miguelete 1825, Montevideo

Sra. Gladis do Canto, Directora

(2) Laboratorio Tecnologico del Uruguay (LATU)

Avda. Italia 6201, Montevideo

Sr. Ruperto E. Long, Presidente

(3) Universidad de Trabajo del Uruguay (UTU)

San Salvador 1674 Of. 6, Montevideo

Sr. Luis M. Lopez Alvez, Director del Departamento de
Cooperacion Tecnica

3. Members of Camara Industrial de la Vestimenta

Camara Industrial de la Vestimenta

YI 1597, Montevideo

(1) Dymac S.A.

Thompson 3077, Montevideo

Sr. Samuel Dymenstein, Presidente

(2) El Mago S.A.

Ciudadela 1438/40, Montevideo

Sr. Jorge Costa Bielli, Director-General Manager

(3) Lycon S.A.

Vustica 1816, Montevideo

Sr. Joel Konik, Director

(4) Martex S.A.

Marcelino Sosa 2419, Montevideo

Sr. Bernardo Halegua, Director

(5) Osami S.A.

Republica Francesa 900, Montevideo

Sr. Walter Cordoba, Director

(6) Rensa Ltda.

Juan Cabal 2615, Montevideo

Sr. Emilio Kaplan, Director

- (7) Sidex S.A.
Miguelete 1512, Montevideo
Sr. Robert F. Schindler, Director
- (8) Sirfil S.A.
Av. Gral. Rondeau 1729, Montevideo
Sr. Jacques L. Palombo, Presidente
- (9) Tom Mix S.A.
Av. Rivera 2451, Montevideo
Sra. Matilde G. de Roitman, Directora
- (10) Bernalesa S.A.
Durazno 930, Montevideo
Sara S. de Grodxicki, Director
- (11) Bursztyn & Was S.A.
Soriauo 870
Sr. Alberto Was
- (12) Creaciones Lal Ltda.
Emilio Romero 118, Montevideo
Jack Levi, Director
- (13) Dakar Ltda.
Marco Bruto 1369 Conijeski, Director
- (14) Denim SA.
Rosalio Colonia
Rodolfo Fuica, Gerente Odministrotiro
- (15) Everfit S.A.
Timote 4652, Montevideo
Oscar Ruber, Director
- (16) Halson SA.
Avda. 8 de Octubre 3225/33, Montevideo
Alejandra Halegua, Presidente
- (17) Ilcon S.A.
Joaquin Requena 1786, Montevideo
Alberto Bandirali, Director
- (18) Kenedy S.A.
Soriano 826 P.1
Carlos Sur, Director
- (19) Peicer Ltda.
Sitio Grande 1315/19, Montevideo
Carlos Mariani, Director
- (20) Ramigo S.R.L.

(21) Relos S.A.

Gral Flores 2987 Marcelino Berthlot 1590, Montevideo
Ernesto Soler Garmendia, Director

(22) Sarco S.A.

Golon 1350, Montevideo
Teofiro Ebeid, Director

4. Members of Punto Industrial Uruguayo

Punto Industrial Uruguayo

Plaza Independencia 811 Piso 2. °, Montevideo

(1) ANZATEX LTDA.

Comercio 1949, Montevideo
Sr. Luis Markowicz, Director

(2) COMEX S.A.

Chana 2286/88, Montevideo
Sr. Israel Korytnicki, Director

(3) EXLAN S.A.

(4) LA SUIZA

San Martin 3628, Montevideo
Sr. Ervin Teszler, Director

(5) MANOS DEL URUGUAY

Juan Carlos Gomez 1240, Montevideo
Sr. Luis Pita, Gerente General

(6) WOOLART URUGUAY

Guana 2021 11200, Montevideo
Sr. Miriam L. de Stainfeld, Director

(7) ALDABALDE, ANGEL

Dr. Lorenzo Carnelli 1206
Angel Aldabalde, Presidente

(8) DISTRILAN LTDA

Durazno 875
Walter Banks, Presidente, Manager

(9) EDE S.A.

Oamacua 589
Walker Imoda

(10) FASHION EXPORT S.A.

Cuareim 2179
Marta Zyman de Dominitz

- (11) FUROR S.A.
Maipu 1820, Montevideo
Isabel Aspesi
- (12) HIPERTEX S.A.
Americo Vespucio 1323
Sr. Mario Wolff, Manager
- (13) MAGDALENA S.A.
Soriano 789, Montevideo
L. Peter Turn, Director
- (14) MECLAR LTDA.
Maldonado 1862/1866, Montevideo
Americo Cestau, Director
- (15) PINKUS BENEDYKT
Marcelino Sosa 2820, Montevideo
Leonardo Benedykt, Director
- (16) RATEX S.A.
Rocha 2383, Montevideo
Denis Herrnstadt, Director
- (17) S.I.L. S.A.
Guaviyu 3279, Montevideo
Julio Cesar Garcia Avdemagni, General Manager
- (18) TRI-LAN S.A.
San Martin 2123, Montevideo
Lila Hendler, Fashion Director
- (19) TWINS S.A.
Valladolid 3405, Montevideo
Gregorio Mitnik, Director

5. Garment related companies

- (1) BOCACHIO
- (2) DANCOTEX S.A.
Veracuerto 2663, Montevideo
Sr. Moises Soloducho, Director
- (3) FIBRATEX S.A.
Emancipacion 4324, Montevideo
Sr. Ricardo Hein, Gerente Comercial
- (4) SUITEX S.A.
Veracuerto 3180, Montevideo
Sr. Danilo Castellano Novellino, Manager Director

- (5) S.A. FABURICA URUGUAY DE ALPARAGATAS
- (6) SECRETARIADO URUGUAYO DE LA LANA (SUL)
- (7) SEDERIA SHANEL (FABRIC MATERIALS)
- (8) TOYOBO BRAZIL LTD.
- (9) TRST LTD. (BRAZIL)
- (10) SUDAMTEX DE URUGUAY S.A.

DR. L. CASSANELLO 823, COLONIA

Sr. Raul Bagnasco, Vice President

6. Others

- (3) Asociacion de Industrias Textiles del Uruguay
Av. Lib. Lavalleja 1672, Montevideo
Sr. Pablo A. Illarietti, Presidente
- (8) BUSQUEDA (Newspaper Office)
- (2) Camara de Industrias del Uruguay
- (9) Dr. Seirra, Lawyer's office
- (5) Fashion model school in Montevideo
- (1) Instituto Uruguay de Normas Tecnicas (UNIT)
San Jose 1031 P. 7 Galeria Elysee, Montevideo
Sr. Pablo J. Benia Salvadores, Director
- (6) Ivent promoter's office (Sr. Etchegarray)
- (7) La Manana (Newspaper office)
- (4) Mrs. Susana Bernik's fashion show
- (10) Sr. Espanol, certified public accountant's office
- (11) Zona Franca de Montevideo S.A.

DATA & INFORMATION

V. Forms of Questionnaire List

Cuadro Analitico Empresarial

(QUESTIONNAIRE 1)

Compañía:		Domicilio	
Presidente:		Tel:	Fax:
		Nombre del registrado:	
Capital accionario: Peso Nacional	Suma Vendida: N. Peso/Año	Exportación comparativa Aprox. %	
Fundación: Mes Año	Volumen de producción Prenda/Año	Exportación comparativa Aprox. %	
Personal: (Total)	Trenzador	Costurero	
Horas de trabajo: hora/día	Número de días trabajados día/año		

Salario del operario: máximo aprox.

Peso Nacional:

el mínimo aprox.

del Peso Nacional

Pago diario,
semanal o mensual

	Lista de artículos principales	Volumen de producción prenda/año	Precio de despacho N. Peso	Precio de mercado N. Peso	Medida de lote	Marca comercial
1º						
2º						
3º						
4º						
5º						

Los datos registrados se usarán sólo para evaluación estadística, y serán guardados con absoluta reserva.

DIAGNOSTIC CHECK POINTS ON ENTERPRISE MANAGEMENT AND CONTROL
(QUESTIONNAIRE 2)

Name of enterprise	Name of respondent	Date	Assessment
<p>(1) Overall corporate policy</p> <p>1) Are there concrete policies as needed to manufacture high quality products?</p> <p>2) Is long term planning appropriately coordinated with short term planning?</p>			
<p>(2) Organization and management thereof</p> <p>1) Are authority and responsibility for quality control clearly defined and appropriately delegated?</p> <p>2) Is the staff practically utilized?</p>			
<p>(3) Provision of education</p> <p>1) Is the education plan appropriate?</p> <p>2) Are cost consciousness and control consciousness high?</p>			
<p>(4) Collection and transfer of information and active utilization thereof</p> <p>1) Is external information collected and transferred?</p> <p>2) Is the information collected appropriately sorted and analyzed?</p>			
<p>(5) Standardization (In-house standardization)</p> <p>1) Has a standardization system been established (documented)?</p> <p>2) Is the standardization system appropriately utilized?</p>			

Name of enterprise	Name of respondent	Date	Assessment
(6) Management 1) Are the management points appropriate? 2) Is the management of instrumentation appropriate? (3) Is the management of facilities appropriate?			
(7) Quality assurance 1) Are testing and inspection of products appropriate? 2) Is quality assessment appropriately audited?			
(8) Future plan 1) Are good points and bad points of the current state of affairs comprehended? 2) Have measures to rectify bad points been established?			

Total points

Assessment : A (Good/3 points)
 Assessment : B (Ordinary/2 points)
 Assessment : C (Bad/1 point)

DIAGNOSTIC CHECK POINTS ON FACILITIES AND TECHNOLOGY
(QUESTIONNAIRE 3)

Name of enterprise	Name of respondent	Date	Assessment
(1) Production capacity 1) Are the facility utilization and facility introduction plans appropriate? 2) Are production process and production layout appropriate?			
(2) Production technology 1) Is there planning capability (product development, product design)? 2) Is the level of production technology high? 3) Is the procurement of raw materials and subsidiary materials appropriate? 4) Are research and collection of information on state-of-the-art machinery including production machines in place?			
(3) Production cost 1) Are man-hours and production costs calculated appropriately? 2) Is there technical education in order to increase productivity and added value?			
(4) Management capability 1) Is expediting management appropriate? 2) Is quality management appropriate? 3) Is schedule management appropriate?			

Total points

Assessment : A (Good/3 points)

Assessment : B (Ordinary/2 points)

Assessment : C (Bad/1 point)

CHECK POINTS FOR THE SELECTION OF A MODEL ENTERPRISE
(QUESTIONNAIRE 4)

Name of enterprise	Name of respondent	Date	Assessment
<p>(1) Executive</p> <p>1) Does he/she take leadership in the business community?</p> <p>2) Is he/she highly motivated to improve and advance the enterprise?</p> <p>3) Is he/she prepared to readily disclose materials and/or information?</p>			
<p>(2) Staff</p> <p>1) Is there full-time management staff?</p> <p>2) Does the staff freely disclose information?</p>			
<p>(3) Production system</p> <p>1) Is the enterprise equipped with its own major production processes and not heavily dependent on subcontracting?</p> <p>2) Are production plants not widely dispersed?</p>			
<p>(4) Labor relations</p> <p>1) Are labor relations harmonious and are employees ready to cooperate?</p>			
<p>(5) Others</p> <p>1) Is the effect of betterment predictable?</p> <p>2) Could the result of betterment favorably affect other enterprises?</p> <p>3) Would selection be appropriately appreciated by the business community?</p>			

Total points

Assessment : A (Good/3 points)

Assessment : B (Ordinary/2 points)

Assessment : C (Bad/1 point)

DETAILED ITEMS OF THE SURVEY ON A MODEL ENTERPRISE
----- RELATIVE TO FACTORIES -----
(QUESTIONNAIRE 1)

(1) Production items

- What kind of items have been produced up to now? (Keep samples etc.)
- What kind of items are currently being produced? (Factory inspection etc.)
- What kind of items can be produced and what kind of items does the enterprise wish to produce? (Discussion with executives and engineers)
- What are the items the enterprise is skilled at producing?

(2) Production capability

- Outline of the facilities
 - . Currently operating machines (type, age)
 - . Plant and equipment planning and objectives thereof
- What is the layout of existing plant and equipment and major production processes?
- Production system

Ratio of in-house production

- (3) Total number of employees (number of female employees, number of male employees)
Including part-time employees but not including hand knitters

(4) Number of employees respectively involved in production (refer to (1) and (2) hereunder), management, and sales

(1) In the case of a fabric sewing factory:

- . Preparation of paper patterns (preparation of industrial patterns and pattern grading)
- . Preparation of sewing instructions (process designs, specifications, cloth, scale instruction, volume of production, expediting control etc.)
- . Rolls of cloth (receiving, inspection, sponging)
- . Cutting (spreading, patterning, cutting, numbering, preparation of accessories)
- . Sewing (sewing, intermediate pressing, intermediate inspection)
- . Finishing (pressing, setting, inspection, but not including washing and chemical washing)
- . Warehousing (packaging, labeling, shipping)
- . Others (machinery maintenance, power, cleaning, food service and so on)

(2) In the case of a knit factory : (0 denotes a task related to hand-knitting)

- | | |
|--------------------------------|--------------|
| . Trial knit | . Cutting |
| 0 Preparation of instructions | . Sewing |
| . Reeling | . Linking |
| . CAD/CAM | . Finishing |
| 0 Management of subcontracting | 0 Inspection |

. Knitting

. Packaging

. Intermediate control
(including repair)

. Dyeing

. Steaming (preset)

(5) Employees involved in management, planning, and sales

(6) Ratio of subcontracting (partial sewing, sewing etc.)

What kind of items or parts are subcontracted/Ratio subcontracting cost to the production cost → Types and amounts (excluding hand-knits)

(7) Organization, organization chart and careers of plant managers (or divisional managers), careers of supervisors of cutting, sewing, finishing, inspection, subcontracting, control and maintenance.

(8) Actual volume of production (items, daily production and money value, number of operators on each production line)

(9) Rejects

(1) Ratio of rejects - areas of top three rejects

(2) Types of rejects require frequent in-house repair - areas of top three repairs

(10) Rate of presence at work and its record during past one year, seasons of high seasonal absenteeism.

(11) Average age, number of years of employment (number of years of regular employment) of sewing operators, number of part time employees and ratio thereof (shift time zone) → (but not including hand-knitters)

(12) Are processes analysis charts made? Are net working hours recorded? Is layout composition of the unit by the synchronizing system or bundle (lot) system?

(13) Is the procurement of raw materials (including subsidiary materials) domestic or by import?

(14) Production technology

- Development technology : Development of new products, technical response of operators

- Work control: operation analysis, process design

- Production control: quality control, work instructions

- Production plant and equipment: Repair and maintenance, improvement, energy conservation, maintenance control of machinery, study of state-of-the-art machinery, collection of information.

(15) Has an improvement proposal system been implemented? What are the actual results and incentives?

(16) Current (past) problems of the plant

DETAILED ITEMS OF THE SURVEY ON A MODEL ENTERPRISE

----- RELATIVE TO MANAGEMENT/CONTROL -----

(QUESTIONNAIRE 2)

(1) Assessment of productivity				
1) Size of line side storage				
1. 2 - 3 hours operation				
2. Less than 1 day operation				
3. Less than 3 days operation				
4. More than 1 week operation				
5. Adjusted by orders				
2) Index of transport activity, average points				
3) Means of transport				
1. Automatic, self powered				
2. Gravity conveyor				
3. Hand pushed conveyor				
4. Push cart				
5. Carried by hand				
4) Construction of machinery and devices				
1. Automated up to transport to the following process				
2. Automated ejection of products				
3. Automatic stop				
4. Machine stop warning by means of a buzzer or a warning light controlled by a timer				
5. Machine stop either while operating unattended or involving confirmation by an operator and manual stopping				
6. Normally operated manually				

- | | |
|--|--|
| <p>5) Details of process analysis</p> <ol style="list-style-type: none"> 1. How many days are required for raw materials to pass through the production line process to the final product stage? (Dp) 2. Total processing time (Hw) 3. $(Hw/8Dp) \times 100 = ?\%$ <p>(2) Level of quality control</p> <ol style="list-style-type: none"> 1) Is the quality control level of shipped products recorded? <ol style="list-style-type: none"> 1. Recorded 2. Not recorded but comprehended 3. Roughly checked 4. Not checked at all 2) Process control <ol style="list-style-type: none"> 1. Process capability is constantly confirmed. 2. Occurrence of rejects in the process is dealt with by means of inspection after processing. 3. Process control is planned by inspection after products have passed through the production line. 4. Plant and equipment are checked by periodic maintenance only. 5. Plant and equipment are repaired and maintained when a problem has surfaced. | |
|--|--|

3) Method of identifying anomalies

1. Anomalities are constantly checked in the process of production line, etc.
2. Anomalities are checked by sampling inspections, etc.
3. Adjustability to the inspection standard is checked only.
4. Applicability for the practical use is only required.
5. No special attention on anomalies.

4) Quality control system

1. Executives are thinking about quality control and the quality control system at all times.
2. Quality control is given sufficient funding while the full responsibility for quality control is delegated to the quality control manager.
3. Quality control comes under the responsibility of workshop supervisors.
4. Quality control comes under the responsibility of operators and is not deemed to be a corporate management index.
5. Quality control has never been given consideration.

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(3) Production costs

1) Man-hour calculation, cost calculation

1. Man-hours and costs are calculated monthly for each process and product.
2. Man-hours and costs are calculated semi-financial period for each process and product.
3. Man-hours and costs are comprehended by product.
4. Man-hours and costs are roughly comprehended for each plant as a whole.
5. Man-hours and costs are roughly comprehended for the enterprise as a whole.

2) Calculation of break-even point

1. Active measures are taken to lower the break-even point.
2. Break-even points are constantly understood by product for the enterprise as a whole.
3. Man-hours and costs are identified for each product as a judgement reference.
4. Man-hours and costs are calculated at the end of each financial period.
5. Man-hours and costs have never been calculated in earnest.

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- 3) Calculation of labor cost
 - 1. Annual sales per employee
 - 2. Annual gross per employee
 - 3. Annual average labor cost
 - 4. Rate of rise of labor cost during past few years
 - 5. Percentage of labor cost in corporate management activities
Trend thereof during the past few years

- (4) Management/control capability
 - 1) Decision making on management
 - 1. Management decisions are made on the basis of the requirements of customers and the response of the market.
 - 2. Management decisions are made on the basis of in-house performance and data.
 - 3. Management decisions are made on the basis of opinions expressed by executives and senior staff.
 - 4. Management decisions are made solely by the corporate president based on his experiences and on his beliefs.
 - 5. Directives are given on the basis of decisions made by computer.

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|--|--|--|--|--|--|
| <p>2) Management of technology and technological improvement</p> <ol style="list-style-type: none"> 1. Planning is done with emphasis on reinforcing the weaknesses of the enterprise. 2. Planning is done with emphasis on preventing the occurrence of rejects. 3. Planning is done with emphasis on developing new products and the market cultivation. 4. Planning is done on the basis of investment plans and amount of investment. 5. Planning is done in response to requests by the production division. 6. Planning is carried out on the basis of the representations of customers and orderers. 7. Planning is carried out with consideration for the maximization of corporate profit. <p>3) Daily schedule management, and work promotion</p> <ol style="list-style-type: none"> 1. Daily schedule management and work promotion is controlled through thorough consideration of production capacity and redundant capacity. 2. Planning is order entry oriented and if necessary, extra capacity is secured by means of subcontracting, work on holidays and overtime. | | | | | |
|--|--|--|--|--|--|

- | | | | | |
|--|--|--|--|--|
| <p>3. The progress of production is controlled by means of computers and production instructions are issued by means of the last-in planning system.</p> | | | | |
| <p>4. Processing is carried out at the responsibility of workshop supervisors on the basis of dispatched instructions.</p> | | | | |
| <p>4) Product inspection and quality guarantee</p> | | | | |
| <p>A) Inspection and standards</p> | | | | |
| <p>1. Inspection is carried out in accordance with inspection work criteria and in compliance with inspection standards.</p> | | | | |
| <p>2. No inspection standard is available, but acceptance or rejection is determined on the basis of goals.</p> | | | | |
| <p>3. Though inspection is carried out, judgment of acceptance or rejection is left to the discretion of inspectors.</p> | | | | |
| <p>4. Inspection is left entirely to the discretion of operators; sometimes inspection is carried out but sometimes not.</p> | | | | |
| <p>5. Inspection is rarely carried out.</p> | | | | |

B) Inspection system

1. 100% inspection is carried out at critical processing points throughout the production process.
2. Sampling inspection is carried out on the basis of reasonable grounds.
3. Products are inspected after completion only.
4. Sampling inspection is carried out from time to time.
5. Products are evaluated according to the response of customers.

5) Control and improvement of production process

A) Is inspection carried out immediately after the completion of processing?

1. 100% inspection is carried out thoroughly.
2. Every process is in charge of inspection before beginning its own work.
3. Sampling inspection is carried out.
4. Inspection is carried out from time to time.
5. No inspection is carried out.

B) In the case of a reject and/or anomaly:

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1. The concerned product is set aside (for a prescribed period), data is kept and an appropriate improvement to the process is implemented.
2. Rectification and adjustment of the process are implemented immediately.
3. The maintenance group carries out an inspection after working hours.
4. Rejects are either repaired or disposed of without subsequent maintenance or improvement to the process.

6) Labor management and moral raising

1. The desires of employees are listened to at all times and are reflected in personnel administration, the in-house education program and the improvement proposal system.
2. A moral survey is carried out from time to time in order to understand the opinions of employees.
3. Management feels comfortable because sufficient attention is devoted to wages and the welfare program.
4. Management is wary of scouting by others because wages and welfare program are no better than average.
5. No special attention is devoted to labor management.

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7) Education, training, guidance

1. An in-house education and training curriculum is prepared and taught regularly.
2. Though no in-house education and training system is available, active use is made of outside opportunities such as seminars.
3. No outside education and training program is utilized. Job site supervisors are in charge of whatever training and guidance may be required.
4. Management is willing to hire personnel who are qualified for in-house education and training.
5. Management is not willing to carry out in-house education and training because those so educated and trained are likely to be scouted by others.
6. Management is of the opinion that capability is an attribute of the individual. Accordingly, no corporate action is taken by the enterprise.

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DETAILED ITEMS OF THE SURVEY ON A MODEL ENTERPRISE
 ----- RELATIVE TO PRODUCTION COSTS -----

Cost item	Production cost	Component ratio (%)
- Direct costs . Direct material costs . Purchased parts costs . Subcontracted wages . Direct labor costs . Other direct costs		
Sub-total		
- Indirect costs . Indirect material costs . Indirect labor costs . Welfare costs, boarding charges . Amortization . Rental costs . Insurance charges . Repair costs . Electricity charges . Fuel gas charges . City water charges . Fuel oil and fuel charges . Other production costs		
Sub-total		
Grand total		

- (1) Number of employees (at the beginning and end of the fiscal period)
- (2) Amount of sales
- (3) Number of working days

DETAILED ITEMS OF THE SURVEY ON A MODEL ENTERPRISE
----- RELATIVE TO MARKETING -----
(QUESTIONNAIRE 3)

(1) Merchandising

1) Are merchandisers dedicated or do they handle other manufacturers' goods as well?

2) Is the enterprise engaged in joint merchandising with overseas partners?

3) Brand policy

- Does the enterprise have any original brands?

- Is there a national brand? (Example : Uruguay, Punta del Este etc.)

Is there a plan to introduce a national brand in the future?

- Is the enterprise associated with well known brands?

If yes, details of the license (under license or OEM)

4) Annual plan schedule and number of patterns

- How often planning is done yearly?

- Schedule and number of planned patterns

. When is merchandise composition planned?

. When are designs completed? (by season)

Outside — What the numbers of pattern

In-house — What the numbers of pattern

. When are prototype samples completed? (by season)

Outside — What the numbers of pattern

In-house — What the numbers of pattern

- . When does production start?
What the numbers of pattern?

5) Creators

- How many designers does the enterprise have?

Outside? Career?

In-house? Career?

- How many patterners does the enterprise have?

Outside? Career?

In-house? Career?

- Development of creators

- . Does the enterprise have a detailed plan for the development of new creative personnel?

(2) Marketing

1) Collection of market information

- Domestic : By whom? Where? When?

- Overseas : By whom? Where? When?

2) Order entry and sales system

- Domestic

- Overseas

3) Promotion

- How is advertising organized?

- Has an event been organized by the enterprise?

If yes, when? where? in what way?

- Does the enterprise plan to organize any events in the future?

Examples : Contests such as a fashion show, best dresser, Mr. Jeans, Miss sweater, etc., or designation of anniversaries such as a particular apparel day.

Does the enterprise have any detailed ideas?

DATA & INFORMATION

VI. The Market Scale of Garment Consumption in Japan

[Unit: ¥ billion, Composition rate/Growth rate: %]

items	Year 1986			Year 1987			Year 1988		
	Composi- tion rate	amount of money	Growth rate	Composi- tion rate	amount of money	Growth rate	Composi- tion rate	amount of money	Growth rate
1. Garment	46.8	46,073	3.8	46.5	46,658	1.3	46.3	47,679	2.2
(1) Men's garment	16.2	15,938	2.9	15.6	15,666	▲1.7	16.0	16,529	5.5
- suits	6.7	6,611	1.2	6.5	6,469	▲2.1	6.9	7,070	9.6
- jacket	1.5	1,505	6.4	1.5	1,535	2.0	1.5	1,587	3.4
- trousers	3.0	2,981	4.0	3.0	3,039	1.9	2.9	3,009	▲1.0
- over coat	0.8	790	3.4	0.9	893	▲17.5	1.1	1,164	30.3
- rain coat	0.3	296	55.0						
- school uniform	0.9	915	▲2.2	1.0	953	4.2	0.8	845	▲11.3
- other clothes	2.9	2,843	4.8	2.8	2,778	▲2.3	2.8	2,834	2.0
(2) Women's garment	24.6	24,192	5.5	25.1	25,214	4.2	24.5	25,215	0.0
- women's clothes	10.6	10,438	7.5	10.7	10,702	2.5	10.3	10,583	▲1.1
- skirt	4.7	4,663	7.5	5.2	5,175	11.0	4.5	4,647	▲10.2
- slacks	1.8	1,732	▲1.5	1.9	1,896	9.5	2.0	2,061	8.7
- over coat	2.6	2,567	▲4.0	2.9	2,909	2.0	3.1	3,164	8.8
- rain coat	0.3	296	3.1						
- school uniform	1.1	1,102	9.9	1.0	1,043	▲5.4	1.0	1,000	▲4.1
- other clothes	3.5	3,404	6.7	3.5	3,490	2.5	3.7	3,761	7.8
(3) Children's garment	6.0	5,942	▲0.3	5.8	5,777	▲2.8	5.8	5,935	2.7
- children's clothes	5.2	5,165	▲0.8	5.0	5,005	▲3.1	5.0	5,152	2.9
- baby's clothes	0.8	777	2.9	0.8	772	▲0.6	0.8	783	1.4
2. Shirt/Sweater	20.5	20,188	5.1	21.1	21,162	4.8	20.5	21,114	▲0.2
(1) Men's shirt/sweater	6.9	6,788	2.5	7.0	7,051	3.9	7.0	7,182	1.9
- white shirt	1.9	1,899	7.4	1.4	1,374	▲27.6	1.4	1,432	4.2
- other shirt	2.5	2,479	▲2.1	3.3	3,260	31.5	3.3	3,349	2.7
- sweater	2.5	2,410	3.8	2.4	2,407	▲0.1	2.3	2,401	▲0.2

[Unit: ¥ billion, Composition rate/Growth rate: %]

items	Year 1986			Year 1987			Year 1988		
	Composi- tion rate	amount of money	Growth rate	Composi- tion rate	amount of money	Growth rate	Composi- tion rate	amount of money	Growth rate
(2) Women's shirt/ sweater	11.3	11,137	8.5	11.8	11,825	6.2	11.4	11,696	▲ 1.1
- blouse	4.2	4,103	6.5	4.4	4,383	6.8	4.1	4,173	▲ 4.8
- other shirts	1.2	1,151	▲ 11.5	1.5	1,504	30.7	1.8	1,865	24.0
- sweater	6.0	5,873	9.2	5.9	5,938	1.1	5.5	5,657	▲ 4.7
(3) Children's shirt/ sweater	2.3	2,263	▲ 2.5	2.3	2,297	1.5	2.2	2,246	▲ 2.2
- shirt	1.6	1,525	1.7	1.6	1,625	6.6	1.7	1,700	4.6
- sweater	0.8	738	▲ 9.1	0.7	672	▲ 8.9	0.5	546	▲ 18.8
3. Underwear	10.1	9,907	0.4	10.2	10,180	2.8	9.5	9,748	▲ 4.2
(1) Men's underwear	4.1	3,994	2.0	4.0	4,052	1.5	3.7	3,854	▲ 4.9
(2) Women's underwear	4.4	4,280	▲ 0.5	4.5	4,493	5.0	4.3	4,379	▲ 2.5
(3) Children's under- wear	1.7	1,643	▲ 1.7	1.6	1,635	▲ 0.5	1.5	1,515	▲ 7.3
4. socks	3.7	3,661	4.7	3.6	3,571	▲ 1.1	3.4	3,545	▲ 0.7
(1) Men's socks	1.3	1,259	3.8	1.3	1,254	▲ 0.4	1.2	1,216	▲ 3.0
(2) Women's long socks	1.0	974	10.8	1.0	1,013	4.0	1.1	1,113	9.9
(3) women's socks	0.7	639	4.4	0.6	612	▲ 4.2	0.5	556	▲ 9.2
(4) Children's socks	0.8	738	▲ 2.3	0.7	702	▲ 4.9	0.6	659	▲ 6.1
5. Gloves	0.4	364	▲ 9.2	0.4	371	1.9	0.3	350	▲ 5.7
6. Other garments	3.7	3,640	3.2	3.9	3,881	6.6	7.7	7,945	104.7
7. Textile/Yarn	5.6	5,490	▲ 3.9	4.9	4,945	▲ 9.9	4.0	4,112	▲ 16.8

Source: A Report on the State of Garment Production (Garment Information Center)

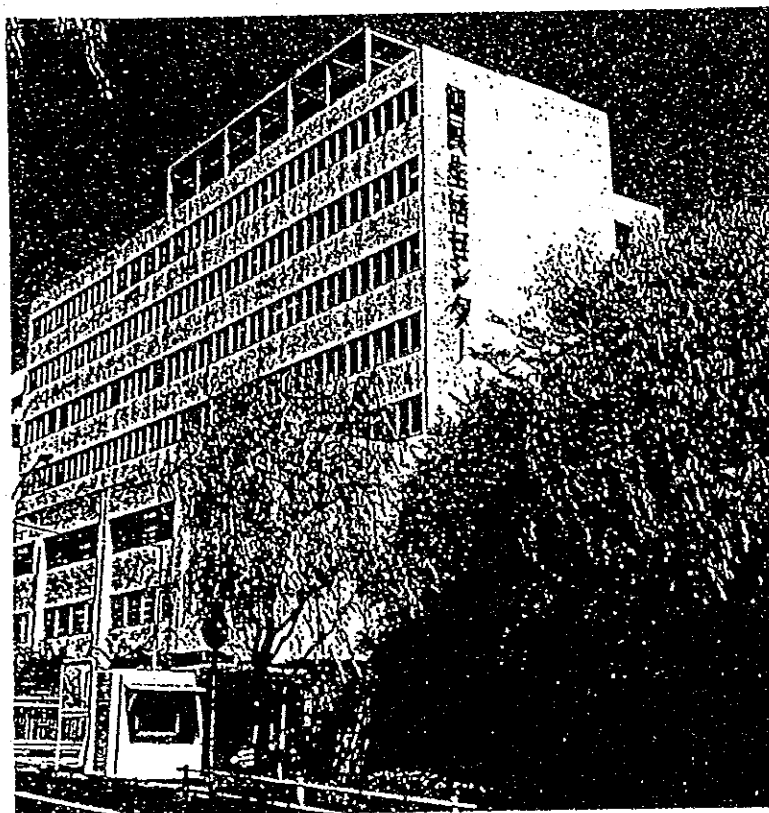
DATA & INFORMATION

VII. Japan Consumer Information Center

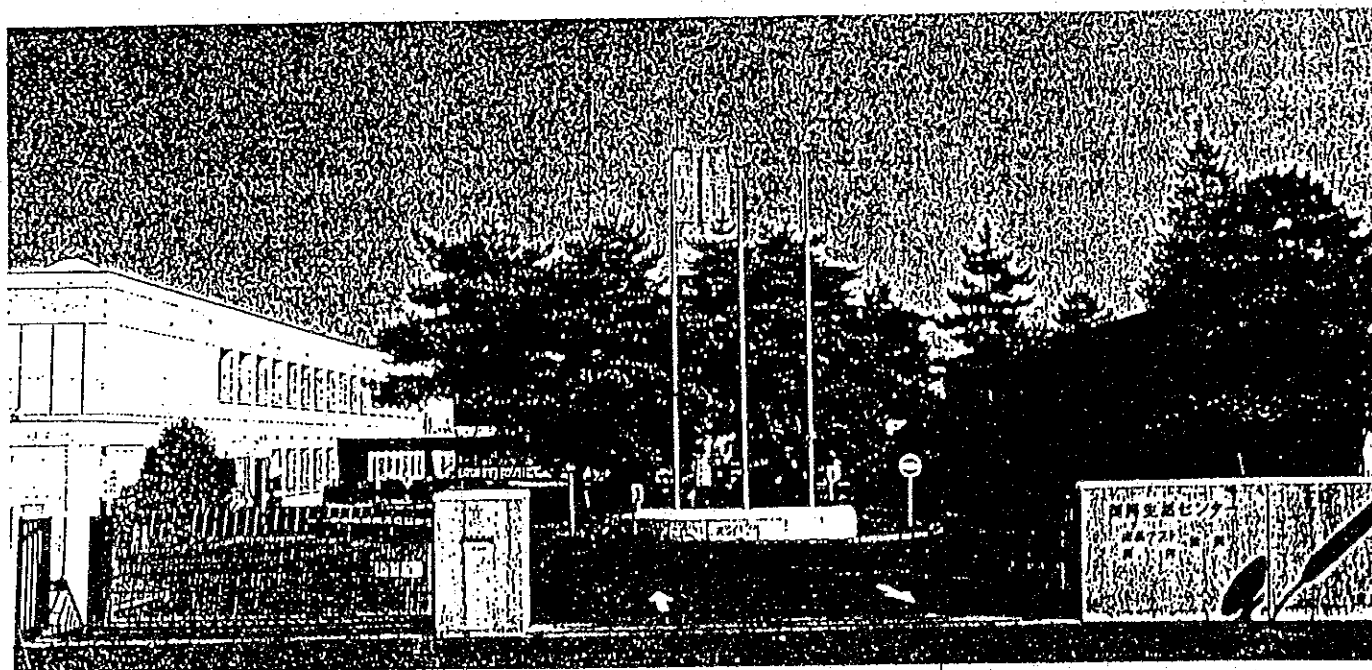
JAPAN CONSUMER INFORMATION CENTER

Kokumin Seikatsu Center

JCIC



Head office (Tokyo, Japan)



Institute of Product Testing and Education (Sagamihara City, Kanagawa Prefecture, Japan)

Introduction

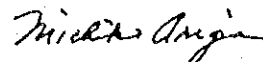
The Japanese economy and society is undergoing the process of a great change. As a result, the nature of consumer complaints has become more complex and diversified, and people's expectation to the role of JCIC is growing bigger.

JCIC was established by the Japanese Government, in accordance with the Japan Consumer Information Center Act on Oct. 1, 1970, in order to provide such services as the education of consumers, the solution of consumer complaints and product testing related to people's life.

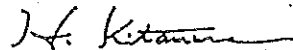
Ever since its establishment, JCIC has carried out a wide variety of services in order to contribute to the stabilization and improvement of people's life and it will redouble its efforts.

We would like to ask our friends abroad who are engaging in consumer affairs in each country for continued cooperation and support in this endeavour.

March 1987



Michiko Ariga, President



Haruo Kitamura, Director General
Japan Consumer Information Center

Outline of this Organization

Organization Chart

Aims and Purposes

To provide information on people's life and conduct research from an integrated standpoint, in order to contribute to the stabilization and improvement of people's life.

— Art. 1 of the Japan Consumer Information Center Act

Established

On Oct. 1, 1970

In accordance with the Japan Consumer Information Center Act (enacted on May 23, 1970, Law No. 94)

Competent Minister: Minister of State for Economic Planning.

Authorized staffing: 9 officers,

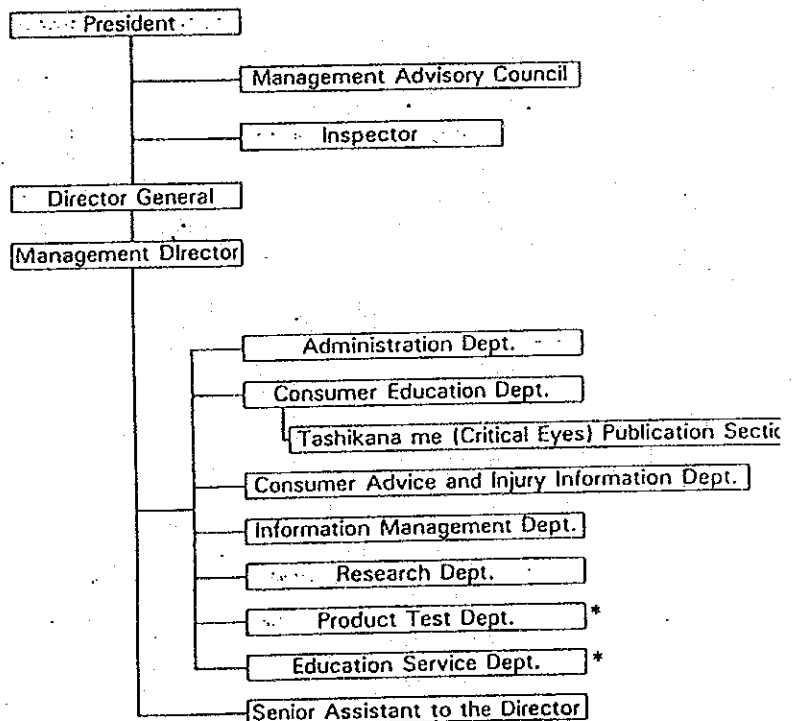
130 staff members (as of FY 1986)

Organization Divisions: 7 departments, 3 divisions, and 2 sections

Accommodations

The Center has several conference rooms, a conference hall and accommodations (capacity of 75 rooms) in Sagami-hara City, Kanagawa Prefecture.

Please make use of our facilities when you hold international conferences.



The organization units marked with an asterisk () are located in Sagami-hara City, Kanagawa Prefecture.

Main Activities

Consumer Education Activities

The Center provides information related to improvement of people's life especially in the area of consumer goods and services through television, radio, "New Media," and various types of maga-

zines. Also, it publishes a bimonthly, "Tashikana me (Critical Eyes)" which publicizes results of product tests.

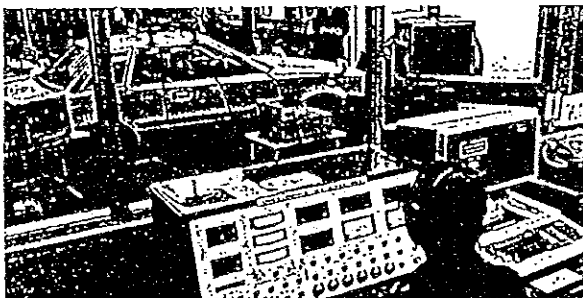
Consumer Advice and Injury Information Services

In response to complaints and inquiries related to consumer affairs and people's life, the Center provides information and handles these complaints and inquiries, and provides relevant related information to related local consumer centers, administrative agencies, etc..... . Also, it collects, analyzes various types of information on consumer injury from local consumer centers and hospitals. This information is then offered to consumers, administrative agencies, etc..... .



Information Management Activities

It collects various types of information related to people's life such as comparative research on services related to people's life and consumption, information on the administration of consumers' affairs, and information on consumer advice, and provides this information to local consumer centers, etc..... . Also, library and reference resources are accessible to the public.

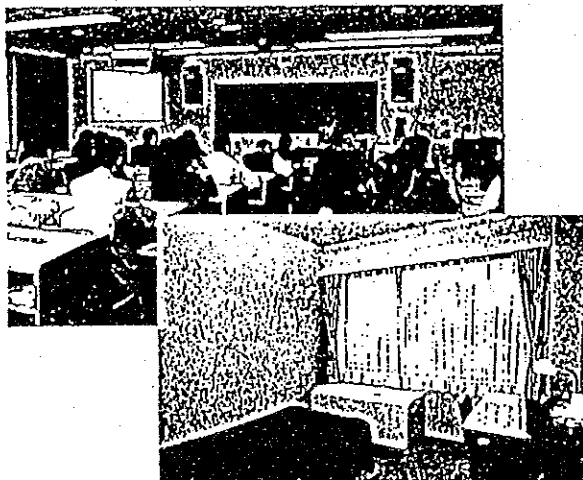


Research Activities

The Center carries out comprehensive research on the actual status and trends related to people's life.

Product Testing Activities

The Center carries out a wide range of comparative tests on products to assist consumers to make a correct choice. Also, it carries out testing of products in response to consumer complaints related to people's life, and provides the resulting information to the public.



Education and Training Activities

The Center's training program provides various types of education and training programs systematically to administrative agencies' personnel concerned with consumer affairs, leaders of consumer groups, and customer complaints staffs of various private companies, on different aspects of people's life and consumer affairs.

Main Publications of JCIC

Title of Publication	Format and No. of Pages	Date of Issue	Price
Tashikana me (Critical Eyes)	A4 100 pages	6 times a year on odd numbered month.	¥450--
Zenkoku shohi seikatsu sodan tokei nenpo (Statistical Yearbook of Consumer Complaints)	B5 About 350 pages	Annually	Distributed to concerned agencies
Kigai joho hokokusho (Report on Consumer Injury Information)	B5 About 280 pages	Annually	¥2,100--
Seikatsu sodan gaiyo (Report on Consultation and Counseling on Consumer Problems)	B5 About 150 pages	Annually	Distributed to concerned agencies
Seikatsu gyosei jyoho (Information on Administration of Consumer Affairs)	B5 About 100 pages	Monthly	¥500
Kurashi no mame chishiki (Handy Knowledge about Daily Living)	B6 About 270 pages	Annually	¥300
Kurashino Kiken (Hazards in Daily Living)	B5 leaflet form	About 10 times a year	Distributed to the general public free

(Note) We have several other publications not listed in the above table.

How to get JCIC Materials

As for obtaining these materials that are distributed for a price from abroad, please make your inquiry or request to Seifu Kankobutsu Service Center (Government Publications Service Center) at the following address:

Seifu Kankobutsu Service Center
1-2-1, Kasumigaseki, Chiyoda-ku, Tokyo, JAPAN
TEL 03-504-3885

On the other hand, for those that are described as distributed to concerned agencies, please forward your inquiry or request to the Japan Consumer Information Center. As there are only limited numbers of copies, if the requested copies are to be used to deepen understanding of the consumer problems and problems related to daily living or for the purpose of research, we will share these publications with you.

JAPAN CONSUMER INFORMATION CENTER

13-22, Takanawa 3-chome, Minato-ku, Tokyo 〒108 JAPAN TEL 03-443-6211
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DATA & INFORMATION

VIII. Fashion Resource Center in Europe and U.S.A.

The fashion resource center concept originated in Europe where many countries have quite an advanced fashion culture. Among well known institutions of this genre are the Musee des Decoratifs and Musee des Arts de la Mode in Paris, France, the Victoria and Albert Museum in London, England, and the FIT Resource Center in New York City, U.S.A.

Fashion resource centers in Japan were planned and brought to fruition by studying these other institutions. Profiles of these fashion resource centers are given below.

1. FIT Resource Center of New York

It was in 1975 that a resource center was first opened at F.I.T (Fashion Institute of Technology) in New York City. The resource center is located on a site of about 1,600 sq. meters in a seven story building. The building is organized as follows.

- 1F - Lobby, reception, gallery, office
- B1F - Gallery, art space
- 2F - Costume laboratory
- 3F - Textile laboratory
- 4F - Library
(Special collection room and art collection room)
- 5F - Library
(Reading room and material consultation room, video room)
- 6F - Library
(Reading room and forecast room)

F.I.T. is owned and managed by the State of New York and is the largest scale educational institution in the field of fashion throughout the United States of America. F.I.T. is intended to serve to develop the human resources required by the garment industry as a whole, beginning with creative technological education up through management education including merchandising.

The resource center holds a collection of tens of thousands of materials and data including costumes, textiles and literature and is actively engaged in providing information through media services and gallery activities.

2. Musee des Decoratifs in Paris, France

Musee des Decoratifs was established by the French government in 1901. It is managed by the Association of Decorative Arts. Collections held by the museum include decorative art items which are positioned in between industrial products and arts. The present collection includes about one hundred thousand items which are classified into (1) wall paper, (2) glass, (3) designs and (4) textiles & costumes. Decorative articles such as textiles & costumes, ceramic articles, metal articles, glass articles, furniture and tapestries ranging from the Medieval Ages are preserved in the collection.

Items in the collection are registered by classification code. The museum's data base covers not only its own collections but also those of other similar museums in France, and is available for data thesaurus. Exhibitions of various kinds are always held in the museum.

3. Musee des Arts de la Mode in Paris, France

Musee des Arts de la Mode was established in 1981. It is managed by the Association of Decorative Arts in conjunction with the Union of French Garment Arts and is engaged in the accumulation and preservation of its collection. The extent of its collection is impressive, including ethnic designs as well as recent designs. The collection includes 1,500 garments and accessories, some dating back to the 18th century, as well as patterns and embroideries, precious ornamental designs, scrap books and so on representing the post-medieval period.

4. Victoria and Albert Museum of London

The Victoria and Albert Museum of London was established in 1852 to provide educational assistance to students studying design. The museum's spheres of activity are classified into (1) collection for appreciation of the arts, (2) endowment of valuable articles left behind and special collections, (3) collections of materials and technology in each field of specialty.

About one hundred thousand textiles and more than ten thousand textile designs are preserved in the collection of the museum. Principal items include Egyptian textiles from approximately 3,000 B.C., while the costume collection includes designs from the 17th century up to the those of today.

APPENDICES

I. Glossary of Terms

II. Abbreviation and symbols

APPENDICES

I. Glossary of Terms

ACCESSARIES Buttons, fasteners, rivets, zippers, etc.

ALPACA An animal related to llama living in Andes mountains in Peru and other South American countries. Wool fabric made of the hair of this animal. Using warps of cotton yarn and wefts of alpaca yarn, worsted yarn from hybrid sheep, or polyester wool blended yarn, the fabric is made in twill or plain weave and alpaca finished. The fabric is thin and tight, has peculiar gloss, and used for suit lining.

ANGORA A type of rabbits native to Angora (present Ankara) in Turkey and improved in England, France, and Canada. English angora rabbits are small and have thin hair, while French and Canadian types are large and have slightly thicker hair. The hair is long and pure white, harvested 3 to 5 times a year, and blended with wool to make lady's clothes materials.

ARMHOLE An opening for the arm. The measure of this opening.

BARE TOP A shirt fitting tightly to the upper half of the body and exposing the shoulders, arms, and back.

BASIC Basic items are moderately fashionable but rarely become very popular. Depending on coordination, these items can be worn over many returns of seasons.

BASIC DRESS A basic dress can be accentuated in various manners by the use of accessories.

BERMUDA SHORTS Slim shorts ending slightly above knees and usually checkered, striped, or printed in bright colors. Also called Bermuda pants. The name is derived from the island of Bermuda, where American men enjoying resort life wore these pants.

BESPOKE Made-to-order, said of clothes or tailor shops.

BLENDED YARN Yarn made by spinning different types of fibers mixed together.

BLOUSON A jacket ending at or slightly below the waist and fitting tightly at the hem with a belt or string. Also, a jumper is sometimes called a blouson.

BODY The part of a garment that covers the torso, as contrasted with the collar and sleeves. The front part and the back part of body are called front body and back body, respectively.

BUNDLE LINE SYSTEM A type of the production systems used in a sewing factory operated by an apparel maker. Parts of a garment are cut from fabric in the cutting room, bundled, and conveyed to the sewing room, where the parts are sewn into a piece of product usually by a single technician.

CALIFORNIAN LOOK Fashions seen in Hollywood, Los Angeles, and other west coast areas, in contrast with those seen in New York and other east coast areas. In general, eastern fashions have classic tastes, while west coast fashions are more modern, influenced by Hawaiian fashions, and characterized by vivid colors.

CASHMERE Wool fabric made of the hair of a type of goats native to Cashmere in India.

CASUAL COAT A coat worn in casual relaxed situation.

CHEMICAL WASH A process in which a chemical (chlorine detergent solution) is used to whiten the surface of fabric as if frosted.

CIRCULAR KNITTING MACHINE A weft knitting machine in circular shape. A knitting machine that produces cylindrical knitted fabric.

CLOTH CUTTING To cut cloth.

CONCEPT A definite idea. For example, a fashion concept means a characteristic tendency seen in a fashion trend.