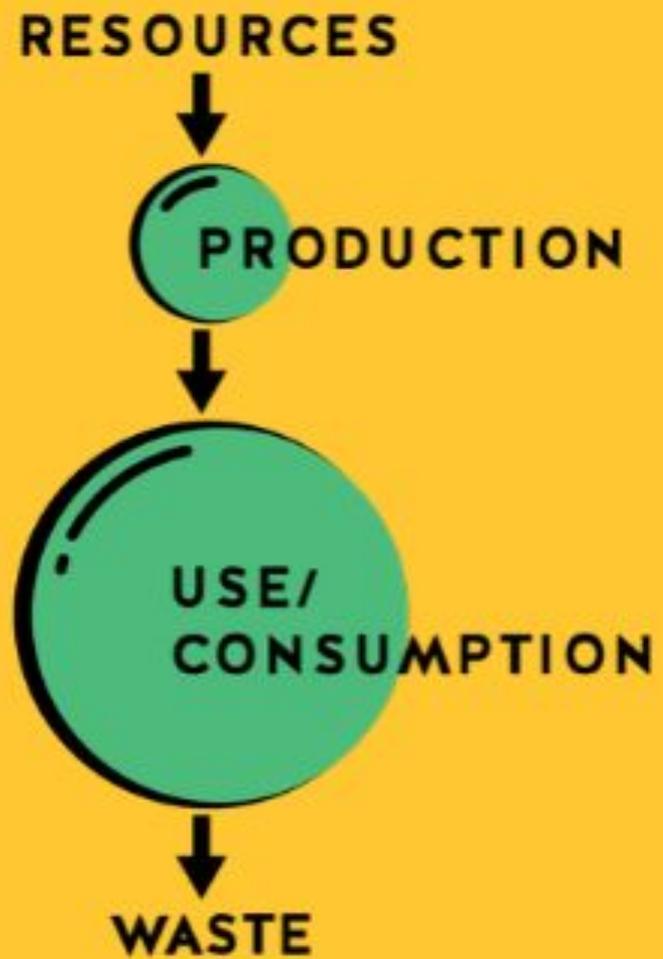
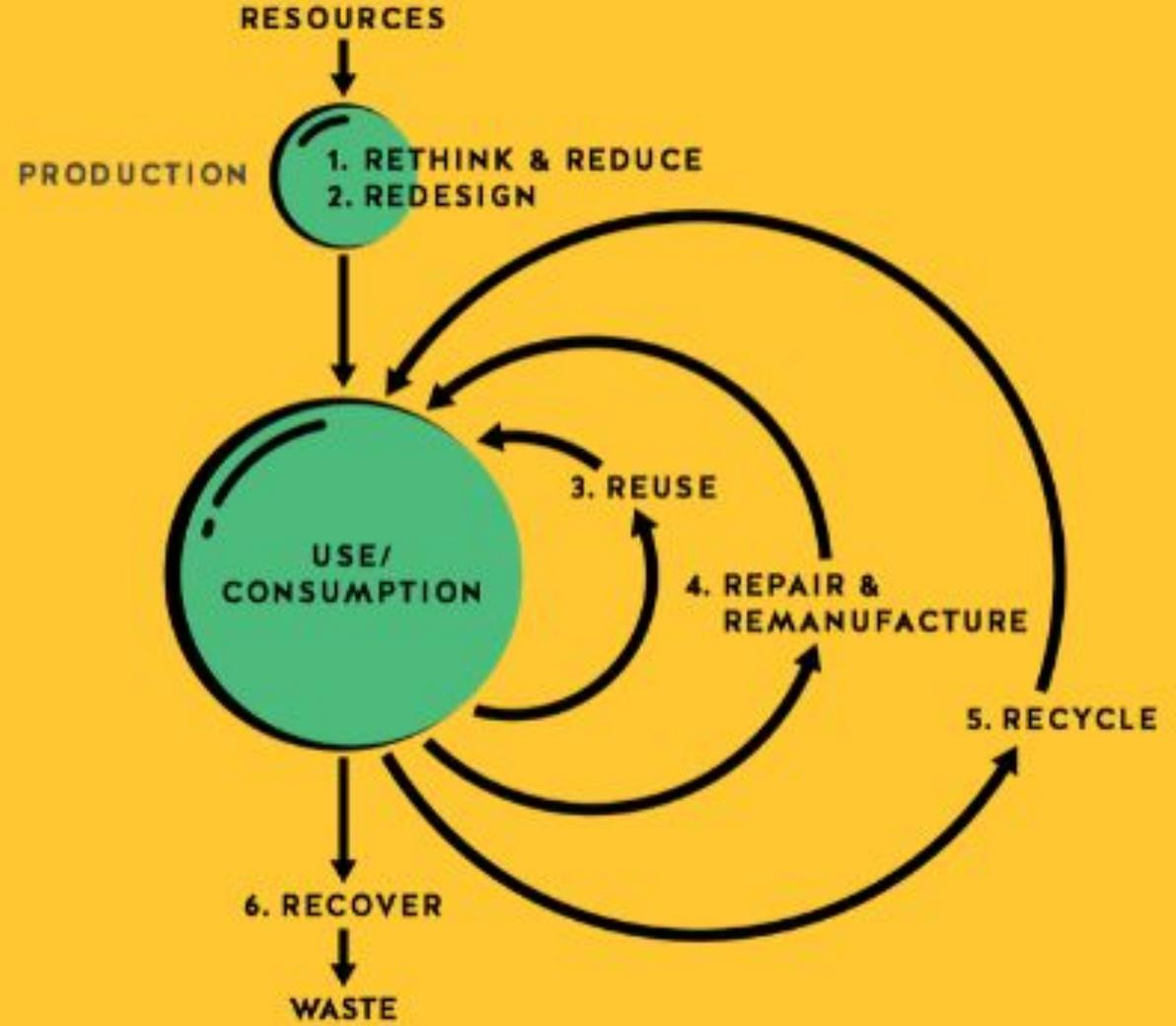
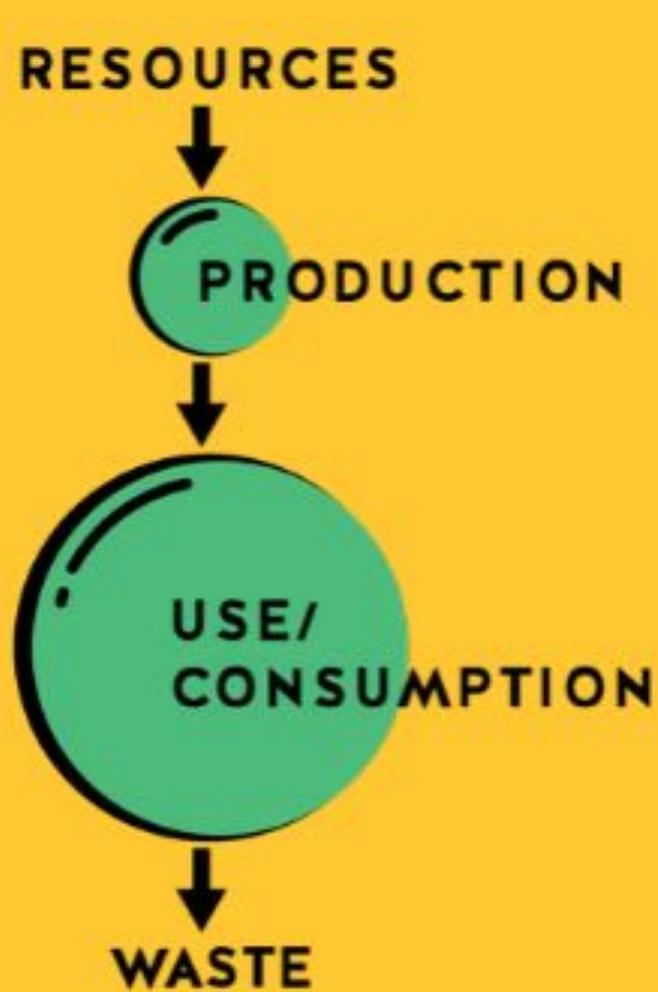


AAPN New York Regional 2023

# A Worker's Path to Circularity

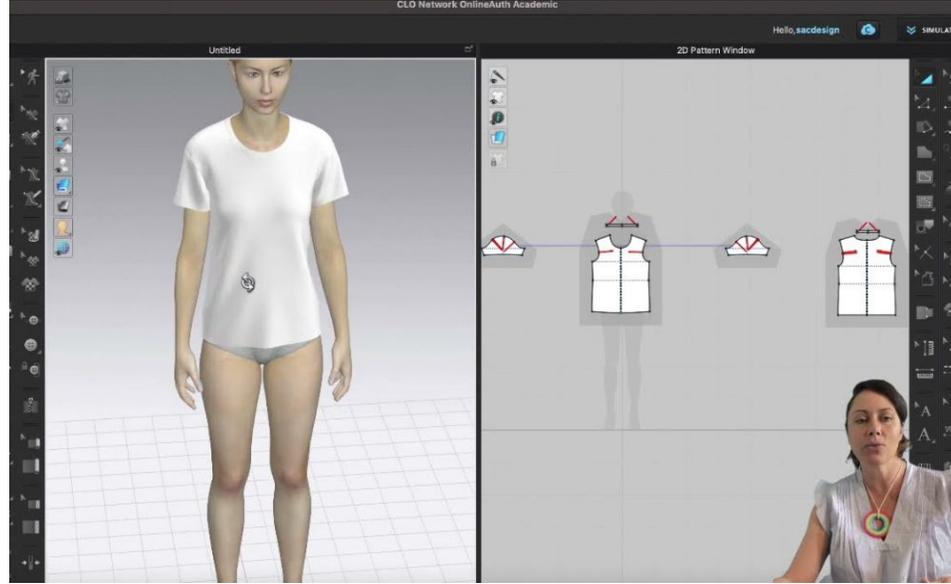




	Circular fashion	Fast fashion	Automation	Offshoring	Reshoring	Roles diverging from expected
<b>Managers</b>						Retail and Wholesale Trade Managers
<b>Professionals</b>						Fashion Analysts and Fashion Writer, Public Relations Professionals
<b>Technicians &amp; Associate Professionals.</b>						Commercial Sales Representatives, Licensing Agents
<b>Clerical Support Workers</b>						Transport Clerks
<b>Services &amp; Sales Workers</b>						E-commerce Executives
<b>Skilled Agricultural &amp; Forestry Workers</b>						Cotton and Other Fibre Producers
<b>Craft &amp; Related Trades Workers</b>						Handicraft Workers in Textile and Leather; Tailors, Dressmakers, Furriers and Hatters
<b>Plant &amp; Machine Operators &amp; Assemblers</b>						Laundry Machine Operators
<b>Elementary Occupations</b>						Manufacturing Labourers

strong reduction
 mild reduction
 no effect
 mild increase
 strong increase







# Your Guides



**Berkley Rothmeier**  
Director, Consumer Sectors, BSR



**Sarah Krasley**  
Founder & CEO, Shimmy





**How will circular fashion, at scale, impact  
job opportunities and quality?**

# BSR: A sustainable business network and consultancy focused on creating a world in which all people can thrive on a healthy planet.



Equity, Inclusion and Justice



Nature



Sustainability Management



Climate Change



Supply Chain Sustainability



Human Rights

# KEEPING WORKERS IN THE LOOP

## *Towards an Inclusive & Regenerative Fashion System*

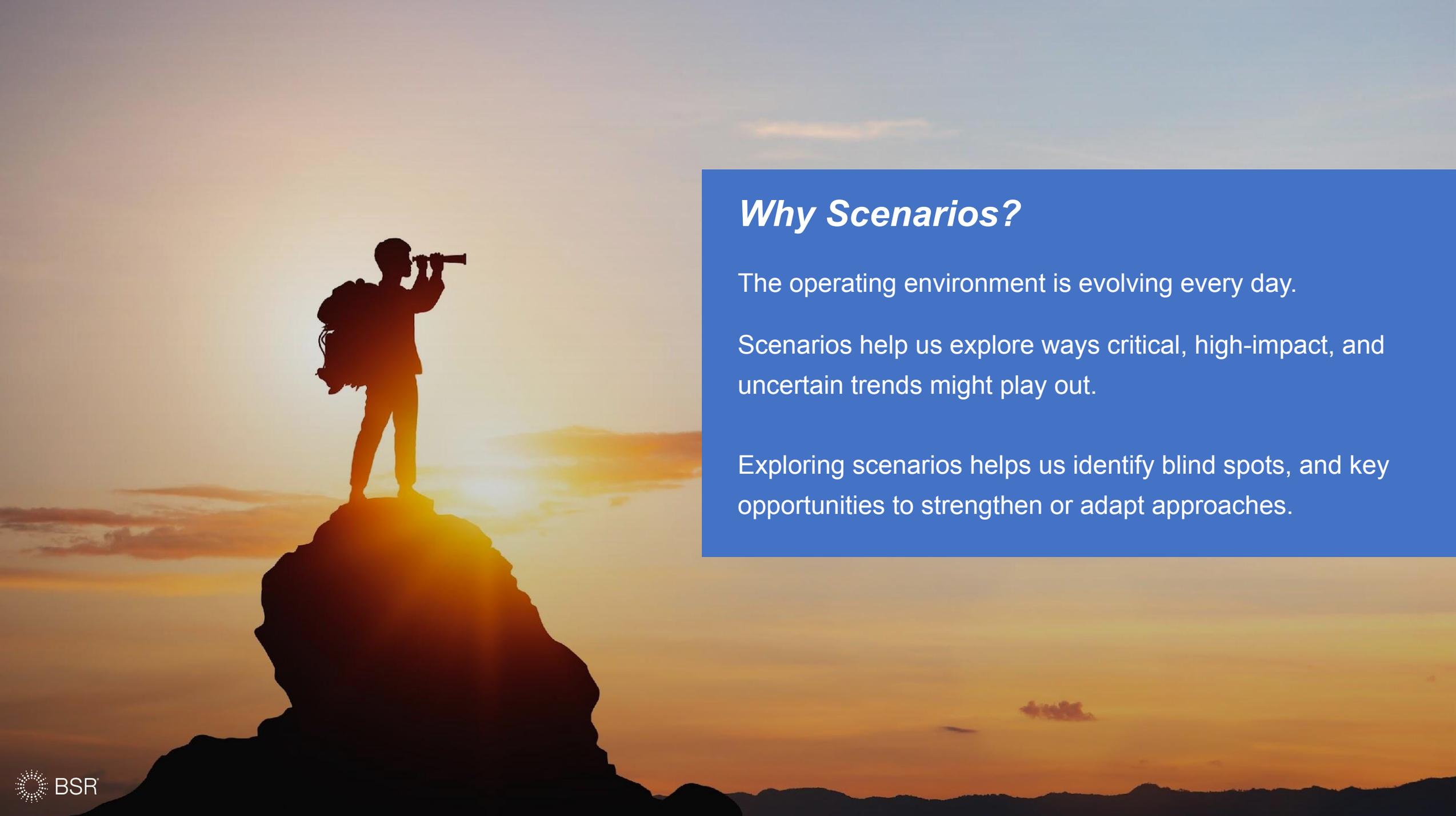
Keeping Workers in the Loop convened 45+ industry participants and stakeholders to **explore what a global circular fashion economy might mean for supply chain workers.**

### THE WORK:

- Deepened understanding of circular fashion's potential **impacts on job opportunities and quality**, including the different **dynamics across consumption and production communities**
- **Co-created recommendations for fashion industry leaders and policy makers** to enable a just, fair, and inclusive transition to circular fashion
- Used **3 plausible futures scenarios** to explore how the impacts of circular fashion will be shaped by highly uncertain factors like automation and climate disruption

### CORE COMPANY PARTICIPANTS





## *Why Scenarios?*

The operating environment is evolving every day.

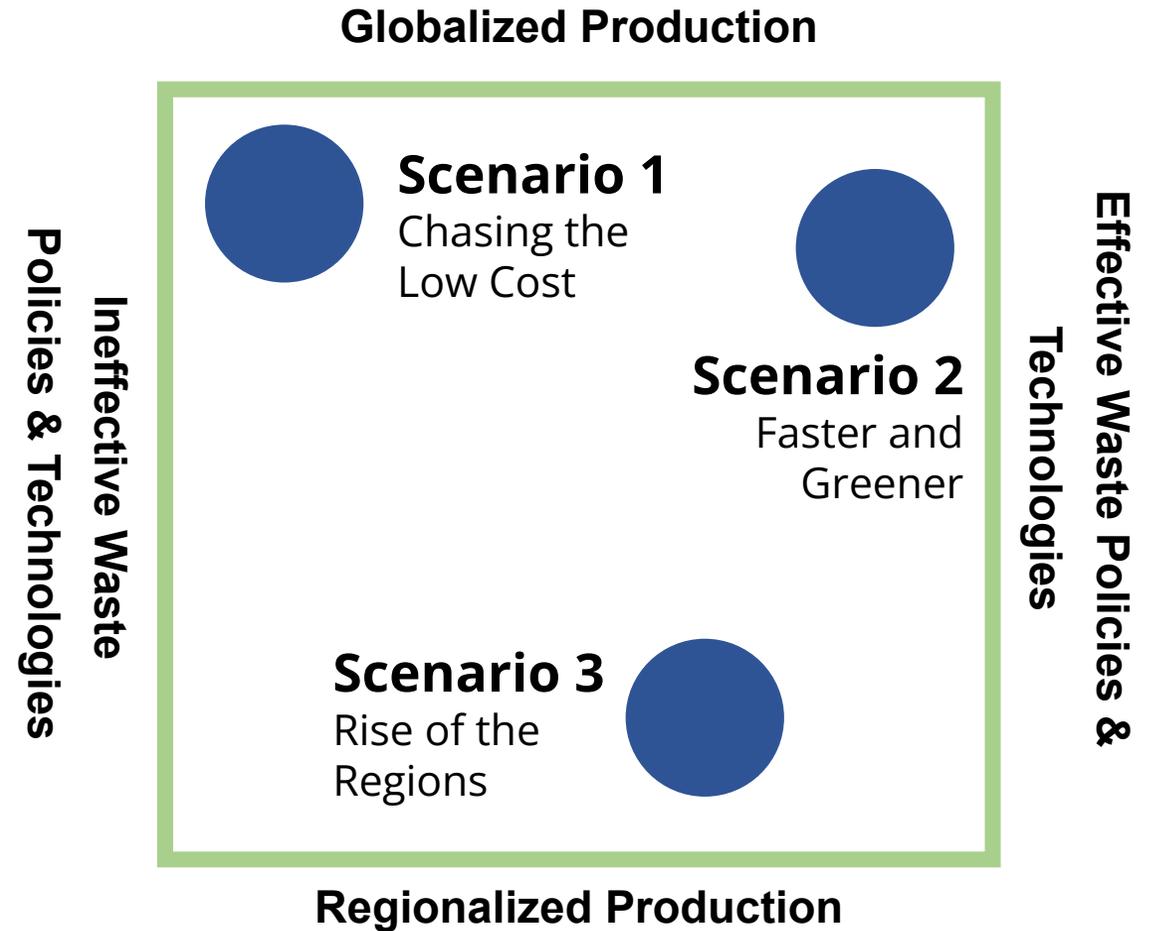
Scenarios help us explore ways critical, high-impact, and uncertain trends might play out.

Exploring scenarios helps us identify blind spots, and key opportunities to strengthen or adapt approaches.

# KWIL Scenarios | Critical Uncertainties

The scenarios explore two critical uncertainties:

1. Level of **globalization** in fashion production
2. Effectiveness of **waste policies and technology**



# KWIL Scenarios | High-Level Summaries

Each scenario explores different plausible permutations of the critical uncertainties, along with other social, technological, environmental, economic, and political drivers of change.



## CHASING THE LOW COST

- On-going COVID disruptions
- Economic hardship in the Global South
- Diversification of fashion production regions



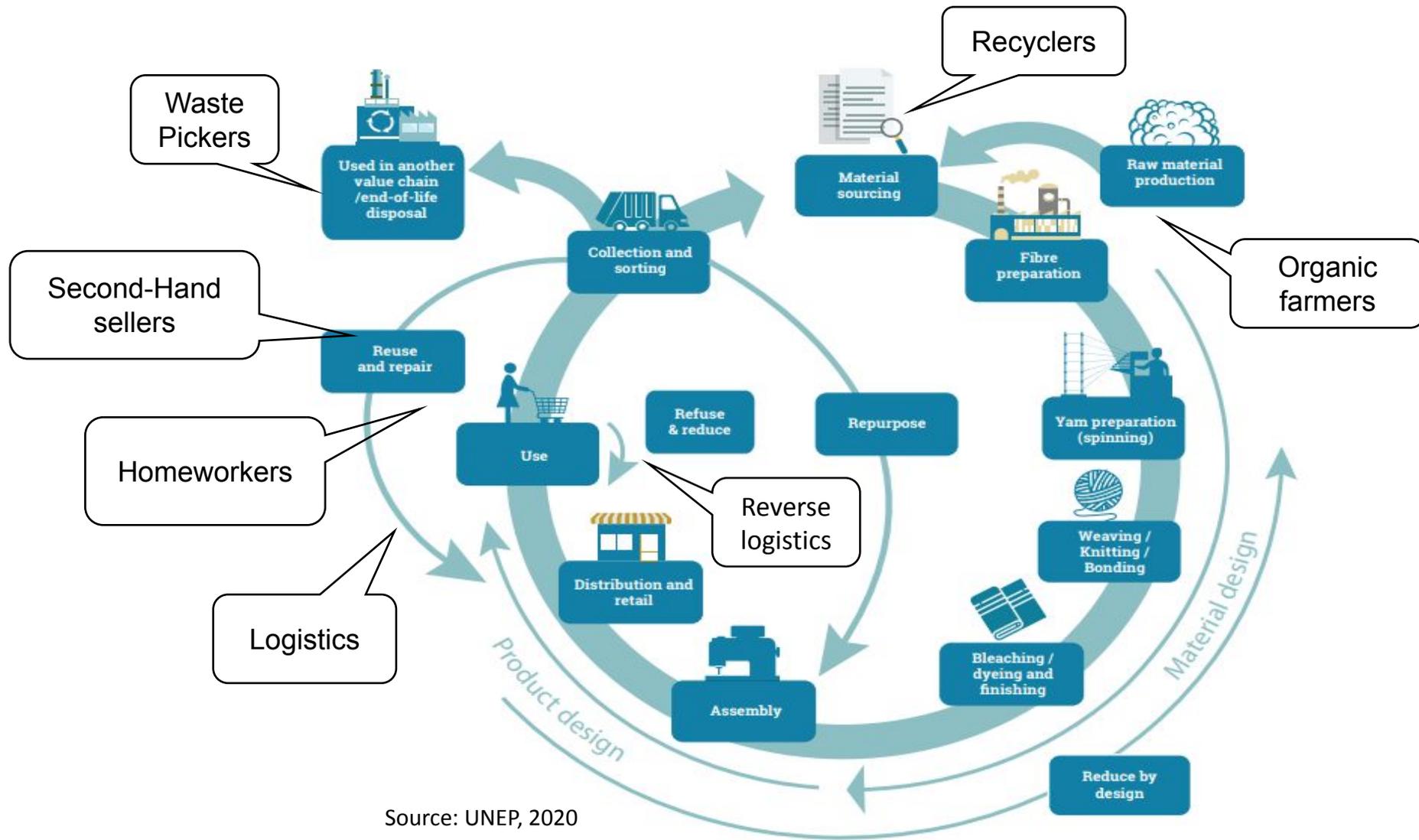
## FASTER AND GREENER

- Self-interested, but collaborative approach to COVID recovery
- Shift to high-tech systems
- Blind spots around some social impacts



## RISE OF THE REGIONS

- Geopolitical tension & trade wars
- EU, EU and China regional spheres of influence
- Rift between China and the West disrupts cotton supply



Source: UNEP, 2020

As circularity becomes mainstream, the global fashion value chain will expand to encompass new segments, activities and workers.



## Meanwhile, disruption and economic inequality are on the rise

- High risk of job disruption over the next decade.
- Trajectory of growing inequality in wages.



## Informal workers, women, and migrants are key, but are especially vulnerable

- Areas of the value chain expected to expand under a circular system are the most likely to rely on marginal and disenfranchised groups.
- Marginalized populations are often “invisible” in the system.
- Already circular parts of the industry have serious job quality concerns.



**Circularity's momentum presents a unique opportunity to reimagine and rebuild the global fashion system so that it works for all**





## Circular fashion presents opportunity for entrepreneurship and upskilling

- Key opportunities for **women's entrepreneurship and SMEs.**
- New roles will require **greater soft skills, more creativity, and technical competencies.**
- **Current skilling efforts are insufficient.**

# KWIL Scenarios | High-Level Summaries



## CHASING THE LOW COST

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## FASTER AND GREENER

- Self-interested, but collaborative approach to COVID recovery
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## RISE OF THE REGIONS

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# What Might Jobs Look Like in 2030?

## JOB CHANGES ACROSS THE 3 SCENARIOS

Highest potential net loss  
Faster & Greener

-878

Baseline 2030: 7,793

Highest potential net gain  
Rise of the Regions

5,847



Biggest loss      Biggest gain

MEN

2

-5,147

3

7,921

WOMEN

3

-2,074

2

4,269

Numbers in '000 of workers

Number fashion workers  
today: 59.2 M

## JOB CHANGES ACROSS SCENARIOS BY GENDER

3 Rise of the Regions

2 Faster & Greener

1 Chasing the Low Cost

Base 2030

-4,000

-2,000

0

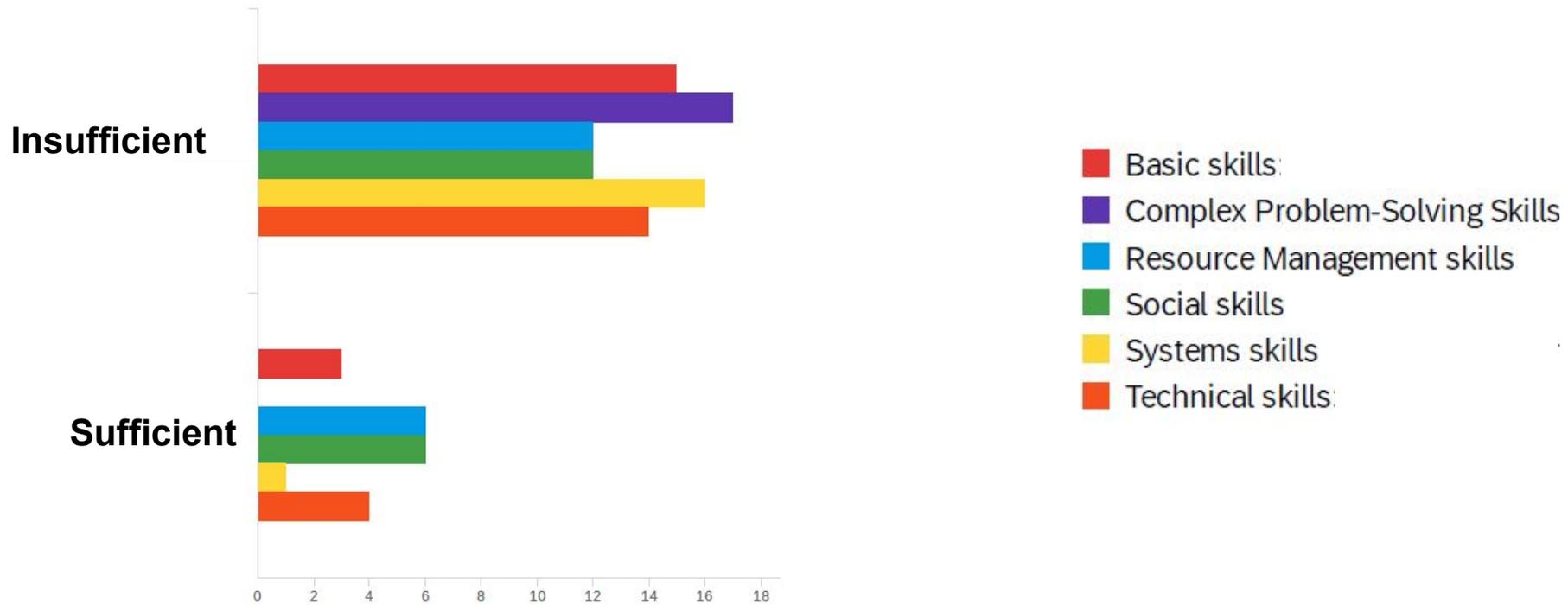
2,000

4,000

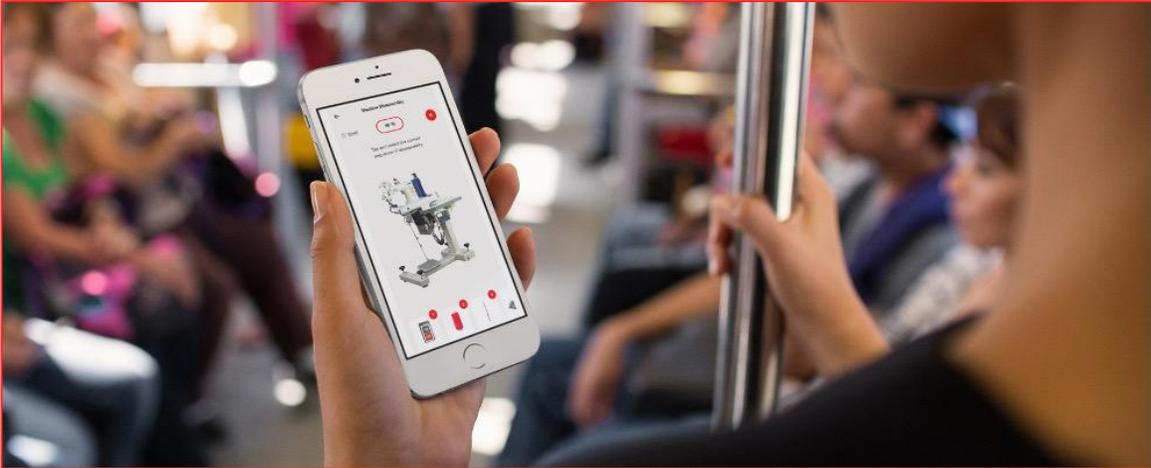
6,000

8,000

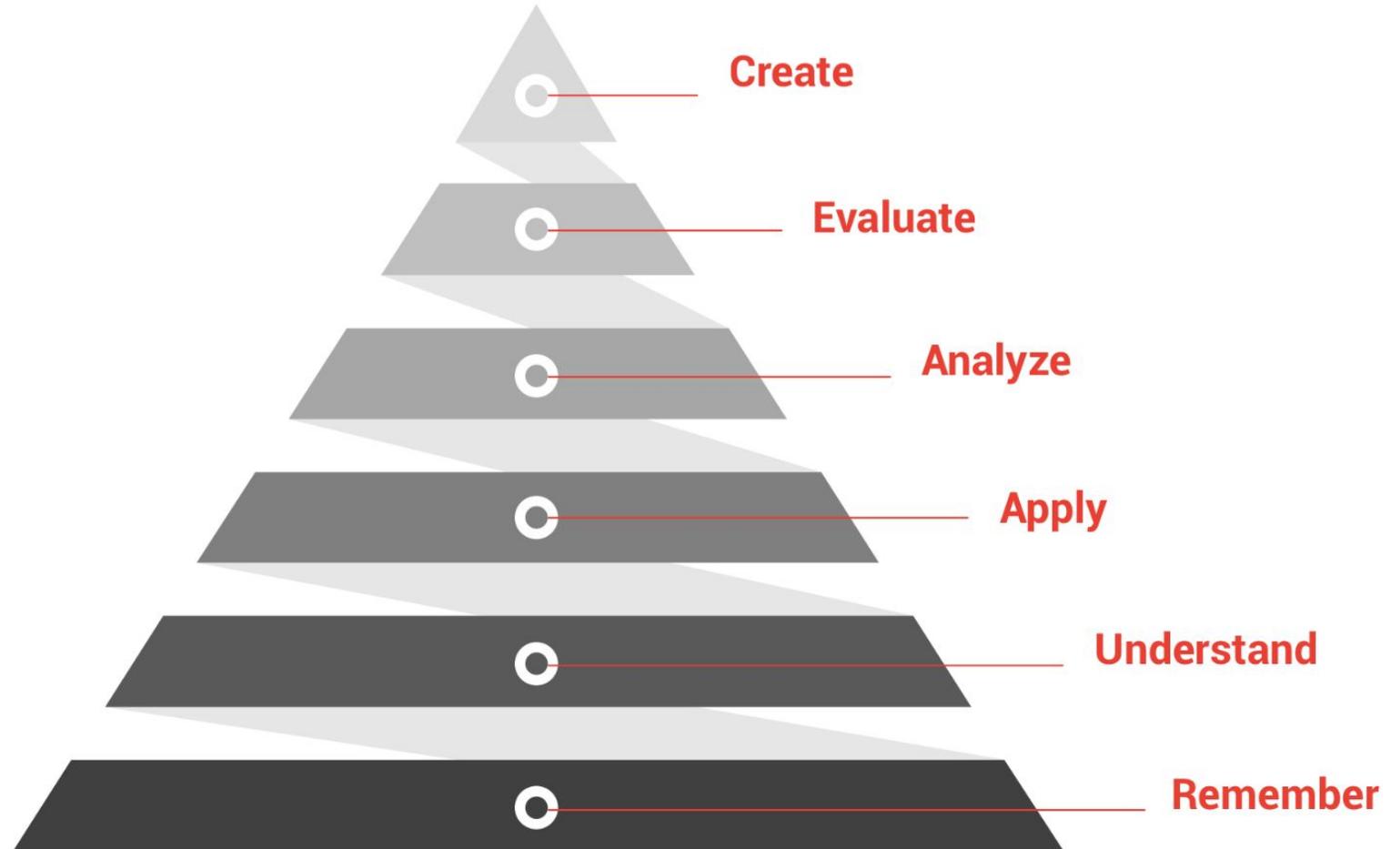
# ...and found current skills training insufficient across all categories to prepare workers for the future of work.



Shimmy provides **joyful, accessible, gamified** industrial training to sewn products workers wherever they are.

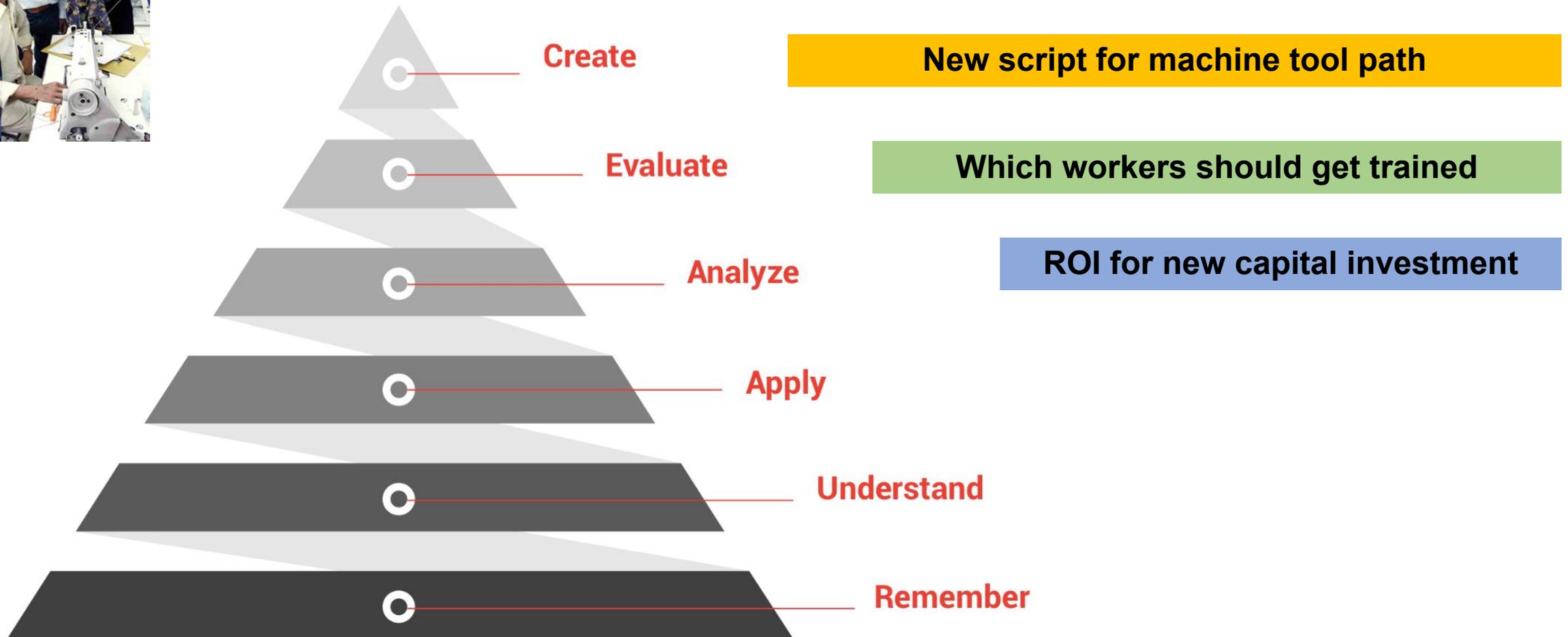


## BLOOM'S TAXONOMY



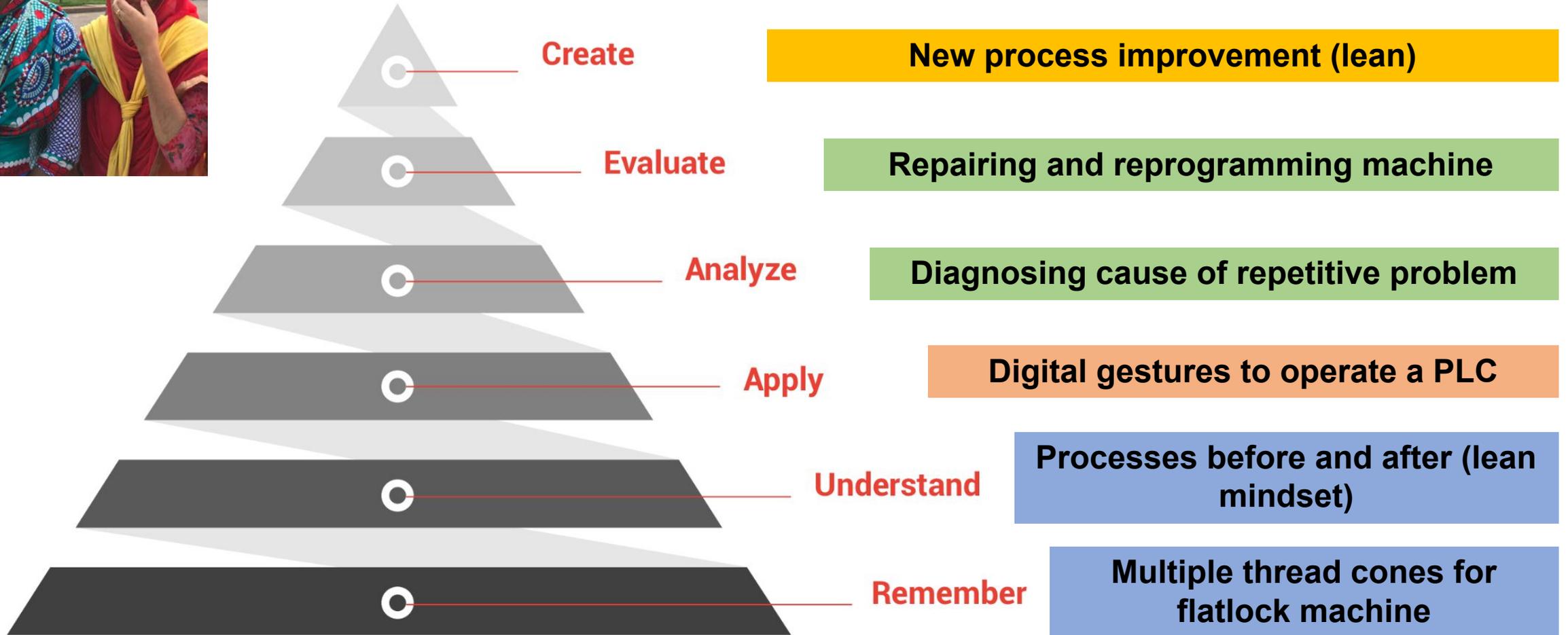


## Manager Skills for Industry 4.0



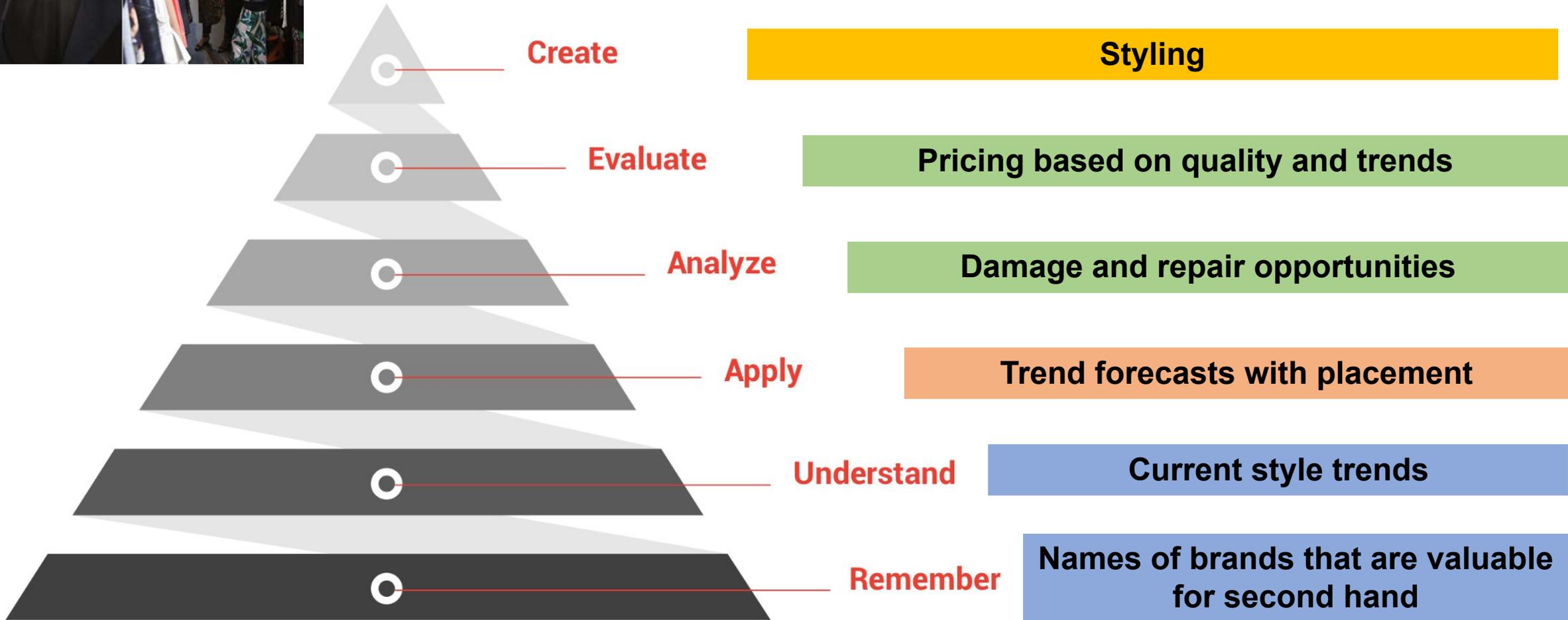


# Operator Skills for Industry 4.0

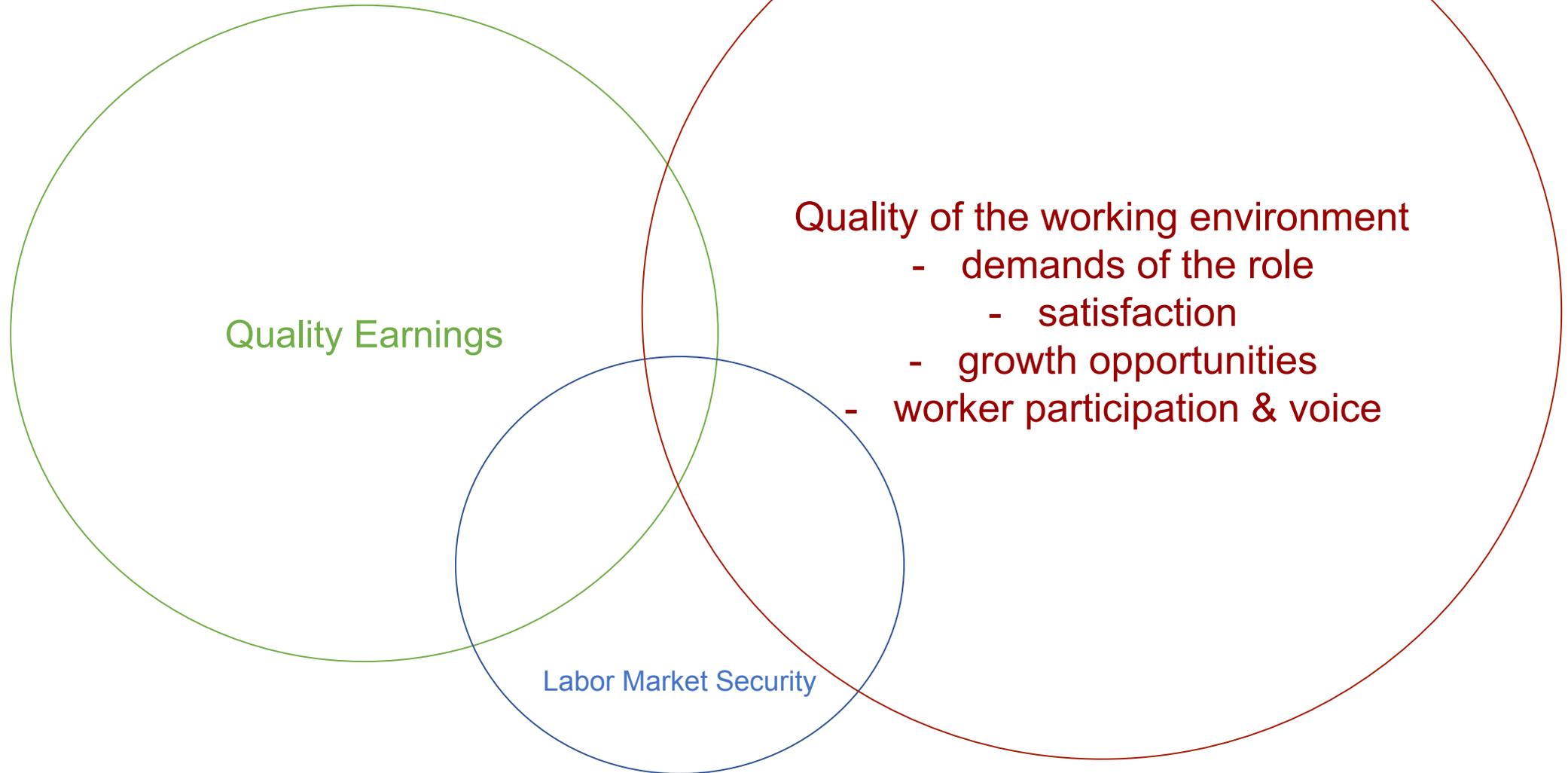




# Textile Appraiser



# What Makes for a Good Job?



# KWIL Recommendations



*Develop & disseminate information about the impacts on workers of changing industry dynamics, including a shift to circularity*



*Prepare & equip workers and organizations for the transition*



*Adapt industry processes & relationships to fit a changing context*



## KWIL Collaboration: Future Opportunities

- KWIL participants saw opportunities to further collaborate on the job impacts of circular fashion. Interest was highest for:
- Valuing existing materials
- Skills mapping to enable decent work and spur innovation

# Sample Action Project: *Developing Skills for Circularity in Production and Consumption Communities*

- **Problem Statement: Skills development and training is currently lacking** in the fashion value chain, and is a pathway to reduced inequality.
- **Desired impacts: Workers are equipped for opportunities** in circular / sustainable production, increasing their employability and earning potential.



## **Potential Activities:**

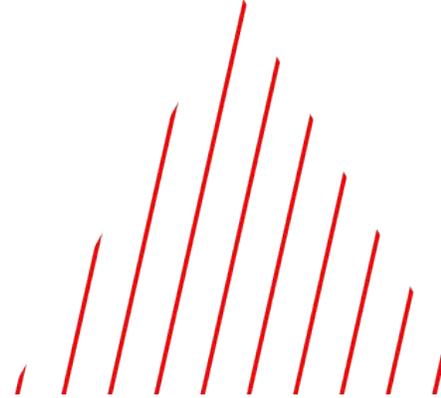
- Select one circular product/service as entry point
- Work with brands, suppliers and service providers to **identify the skills needed** for workers to fulfill new roles/role changes
- **Dual pilot** in a production and a consumption community, reaching several hundred workers
- **Assemble learnings** to contribute to an overall skills map for circular roles

# Discussion & Q&A



What resonated with you most about today's content?

What questions do you have about circularity?



Is your organization already moving toward circularity?

Would anyone like to share their experiences to date?



What challenges or barriers do you see related to scaling a circular apparel economy?

# Thank You!

***Reach out to join us on our next steps towards an inclusive & regenerative fashion system.***



**Berkley Rothmeier**  
Director, Consumer Sectors, BSR

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