EMERGING DISTINCTIONS IN GLOBAL FASHION: a new landscape for fashion capitals?

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Abstract

This research relies on the concept of Field Configuring Events (Lampel & Meyer, 2008). It is recognized that, during decades, fashion weeks, mostly in London, Milan, New York and Paris, have shaped the global fashion industry.

This research aims at assessing the changes which occurred between 2019 and 2021, thus including the reaction to the COVID-19 crisis. The results of this study show new inflexions, including a shift toward the use and promotion of a national offer and market.

The results of this study show a trend towards a specific positioning for every Fashion Week. Thus domestic specificities are more taken into account. New players apart from the four main fashion capitals have taken an interesting role.

Therefore, this study gives a new perspective on the way a Field Configuring Event (Meyer & al., 2005) can be envisioned. Hence this study challenges the idea of the relevance of one single event and highlights the asset for an industry of having rather a range of events.

Introduction

This research relies on the concept of Field Configuring Events which are defined as 'temporary social organizations that encapsulate and shape the development of professions, technologies, markets, and industries' (Lampel & Meyer, 2008, p. 2). It is recognized that, during decades, fashion weeks, mostly in London, Milan, New York and Paris, have shaped the global fashion industry. This research aims at assessing the changes which occurred between 2019 and 2021, thus including the reaction to the COVID-19 crisis. The results of this study show new inflexions, including a shift toward the use and promotion of a national offer and market.

This research is based on a desk-study and a field study. The desk-study relies on an inventory of the debates echoed by the business media of the fashion industry regarding the positioning and future of the main fashion weeks. The field study relies upon business material, interviews and field observation. This longitudinal study is based on an observation between 1973 and 2015, and a comparison with the 2016-2021 period. Analyses of 35 years of general assembly minutes of the Fédération Française de la Couture have been conducted, which gave first-hand information on the strategy of the main professional organization managing the Paris Fashion Week. 24 interviews of key actors of the industry (CEOS and former CEOs of the fashion and luxury industry) have been conducted. Besides, interviews of experts on the Milan and New York fashion weeks have been planned. A global study of the recent changes dealing with the main fashion weeks has been conducted. A focus has been made on the Paris Fashion Week, which, implicitly since its creation in 1973, and explicitly since 1998, had an openness and inclusivity strategy for the *Prêt-à-Porter*, while keeping its *Haute Couture* exclusive and national.

The results of this study show a trend towards a specific positioning for every Fashion Week. Thus, domestic specificities are more taken into account. New players apart from the four main fashion capitals have taken an interesting role. Hence, the Shanghai fashion week is a case of a specific positioning, aiming the domestic market and combining BtoB and BtoC. The Copenhagen fashion scene is making a specific focus on sustainability. And more globally, the trend towards sustainability has become a reality. At the same time, New York and Shanghai are more willing to address local markets and local designers. Locations are still present, but the digitalization changes their perception. Choices have been made between keeping presenting real collections and showing films. The four main fashion capitals made a strong shift toward digitalization.

Therefore, this study gives a new perspective on the way a Field Configuring Event (FCE) (Meyer & al., 2005) can be envisioned. Hence this study challenges the idea of the relevance of one single event and highlights the asset for an industry of having rather a range of events.

Literature review

It has been shown that the inclusion of the economy in formal and informal networks plays a favorable role for agents (Granovetter, 1973 and 1985). These networks make it possible to obtain exchange of information and to benefit from economic opportunities (Uzzi, 1996 and 1997). The networks take the form of regular meetings that structure the activity of a sector and even define the criteria for judging it (Anand and Watson, 2004). These Field Configuring Events (Lampel & Meyer, 2008) do not, however, automatically offer a guarantee of sustainability for their participants (Delacour and Leca, 2007). An organizational field is always threatened by deinstitutionalization (Oliver, 1992).

While the mechanisms of deinstitutionalization have been well documented, little research has been done on how an organization can react to the threat of deinstitutionalization.

The fashion industries appear to be operating without any real competition in the high-end segment at the end of the 1920s. The fashion industries appear to have no real competition in the high-end segment at the end of the 1920s (Simon, 1931; Deschamps, 1938). On the other hand, they were competition from the 1960s onwards (Merlo and Polese, 2006; Djelic and Ainamo, 1999). This threat of deinstitutionalization was overcome in the early 1970s (Grumbach, 2008). However no research has been done on the way the Field Configuring Events of the fashion industries have been changed by the last two years.

Methodology

This research is based on a longitudinal analysis of the role of the Third-Party actors in supporting the fashion capitals.

The research used both secondary and primary qualitative data and was based on a thematic analysis of (1) the minutes (previously unreleased) of the general assembly of the Fédération de la Haute Couture et de la Mode (called underneath Federation) and (2) 24 interviews conducted between 2008 and 2021. Interviewees were chosen with the aim of capturing a diverse range of firms and also to meet people who directed firms throughout the period studied.Among the people interviewed were the former CEOs of Christian Dior Couture, Chloé International, Givenchy, Guy Laroche, Hermès International, Karl Lagerfeld, Kenzo and Yohji Yamamoto in France.

The interviews were conducted face-to-face using a semi-directive method. They lasted on average 44 min. All the interview were recorded and transcribed into verbatim. The transcribed interviews were then coded by themes using the QSRNVivo10 software.

A triangulation of data was also conducted in order to better analyze the data. First we crossed the information obtained from monographies and general assembly minutes with the information obtained from the interviews. Second, we checked the accuracy of information with several professional for the key research themes in our study. Triangulation also gave interesting results concerning the reality of the threat Paris faced from the Milan in the 1990s.

Besides a desk research on specialized business magazines such as *WWD* and *Jing Daily* has been done on the changes of the New York and Shanghai Fashion Weeks. This research has been completed by a one hour interview with an expert from the Shanghai Fashion Week.

Findings and analysis

The high-end fashion industry/Haute Couture sector is structured globally around bi-annual presentations of collections: the fashion shows (Zajtmann, 2017). These were first introduced in the 1920s in Paris by a pre-existing professional body, the *Chambre syndicale de la couture Parisienne*. The presentations of collections in Paris remain important events for the global fashion industry thanks to a long-term strategy of strong professional representation, regulation and integration of national and international key industry players carried out by the Federation over time.

Haute couture started in Paris in 1858 with the establishment of a new professional activity: the *couturier*. A *couturier* is someone who signs their creations and sell their products to a private clientele. In 1911, these professionals decided to create their own professional organization, the *Chambre syndicale de la couture parisienne*. In the 1960, face with the new competition from newcomers in the sector both domestically with the advent of the Ready-to-Wear sector and from abroad with the rise of the importance of couturiers from Milan, New York, etc. the couturiers decided to reshape their professional organization by extending its remit to integrate these newcomers. This led to the creation of the Federation in 1973.

The importance of local professional organizations and regulations in the development of creative sectors has been emphasized by Scott (2000, 2010). In his work on the interaction between creative industries and cities, he demonstrates how institutions of governance and collective action constitute a major component of the "creative field of the city" (Scott, 2010, 115).

Indeed how collections are sold is a key component in the value chain of the fashion companies. For these companies, being part of a network that enables them to meet professional buyers is crucial. There is therefore a strong need for intermediaries in this industry to support point of encounters where industry players can meet. In this context, a cultural intermediary such as the *Federation* can play a key role.

Over the years attempts to contest the dominance of Paris in the high-end fashion industry by the cities of Milan, New York and London have never really succeeded. Paris has managed to respond to this competition by offering a diversified and international environment, thanks in part to the strategies put in place by the French fashion industry's governing body, the Federation. The city has thus maintained its leading role in the global fashion industry.

The value chain of the Haute Couture sector can be described the following way. Individual clients and professional buyers acquire Haute Couture products by visiting the so-called salons of the couture houses. Since the 1920s, clients have also attended the fashion shows organized by these houses. These couture houses are based in Paris and contain "ateliers" inside the city of Paris as well.

In contrast, the value chain of the Ready-to-wear sector can be described as follows. Individual clients acquire Ready-to-wear products in multi-brand stores. The buyers from the multi-brand stores attend the bi-annual Ready-to-wear fashion shows in Paris.

The high-end fashion sector in the world can be considered on the basis of retail characteristics. From this point of view, two main types of actors need to be considered: mono-stores which generally belong to large and famous brands (e.g. Christian Dior and Chanel) and multi-brand stores among which we can distinguish two categories: department stores such as Bergdorf Goodman, Selfridges, etc. (the department stores from the USA playing a major role in this category) and independent multi-brand stores such as Dover Street Market in London which, while less important with regard to their turnover, are considered as avant-garde by professionals in the industry and, as such, have influence in the selection of the fashion brands they decide to sell.

Key moments for the industry are when professional buyers gather for the bi-annual fashion weeks where the new collections of fashion brands are presented to professional buyers who then make their orders. The fashion weeks in Paris are the ones with the most importance globally. Twice a year, the main international buyers and journalists gather in Paris to attend the *prêt-à-porter* fashion shows. Being part of the Parisian fashion weeks is considered as a measure of talent recognition for international fashion brands. This has motivated Japanese brands to take part in the Parisian fashion weeks in the 1980s, same for Italian brands in the 1990s and the Russian and Asian brands in the 2000s.

Besides Paris, three other major cities play a significant role in the global fashion industry: Milan, London and New York. The Milan fashion weeks present Ready-to-wear brands, mainly Italian ones. However no Haute Couture (as it is proposed in Paris) presentations are made in this city and few emerging designer brands are presented within this context. The London fashion weeks are recognized as very creative, and are therefore much attended by journalists and fashion talent scouts. However few orders are being made during these fashion weeks. The New York fashion weeks have a significant international coverage. However, the business audience at these presentations is mostly North American. As such, Paris is still playing a key global role high-end fashion with the main buyers and journalists from the industry coming to Paris for its two bi-annual events, the couture weeks and the other so-called Paris Fashion Weeks.

In the 1950s and 1960s, strong competition started coming from Italy. Initiated by Giorgini, an Italian businessman, fashion shows were organized in Florence and attracted considerable interest from American buyers. An Italian coordination and promotion body, the *Camera Nazionale della Moda Italiana* (the National Chamber for Italian Fashion), was founded in 1958. The USA also started developing its own high-end fashion industry in the 1970s. Organizations such as Calvin Klein and Ralph Lauren thrived without attending the European fashion shows.

On the domestic front, the couture industry was challenged considerably by the so-called *créateurs de mode* (emerging fashion designers), who started organizing fashion shows outside the official calendar and quickly won approval from specialized and generalized magazines. Most of these newcomers came from the Ready-to-wear industry. This was the case, for example, of Kenzo, who was born in Japan in 1939 and presented his first show in Paris in 1970 (Kawamura 2004, 114-119); Sonia Rykiel, who created her eponymous company in 1966

(Jones and Mair 2003, 402) and Agnès B., who opened her first store in Paris in 1975 (Jones and Mair 2003, 50).

From the mid-1960s, *Haute Couture* professionals in Paris had to face the rise of a counter-culture of influential *créateurs* and *stylistes*.

The main steps of the history of the Federation are the following:

- 1973: foundation of the Federation, comprised of 3 bodies: one for Haute Couture, one for Ready-to-wear and one for menswear.
- 1998: official strategy from the Federation: Haute Couture is exclusive and national, Ready-to-wear is inclusive and international.
- 2001: softening of the regulations for Haute Couture by the French ministry of industry.

This key strategic change and evolution of the structure, organization and regulation of the professional organizations representing the fashion industry in Paris, to incorporate international competitors, helped Paris in retaining its role as the global and key center for fashion. Since then, key international competitors have been regularly admitted as members of the Federation.

It is also interesting to look at the use of Paris as a space by the high-end fashion industry at different levels. First, space in terms of a geographical location (with production, design studio and head offices concentrated in Paris), embodied by *Haute Couture* in general. Second, the use of specific neighborhoods by some Parisian designers, as done for example, by the brand Kenzo, which relied on the district around *Place des Victoires* for its head office and design studio. Third the use of Paris only as a space of exhibition during the fashion shows, as done by Italian brands such as Valentino whose studio stayed in Roma, or Acne, a Swedish brand, thriving on jeans wear product.

Similar professional organizations have been created in London, New York and Milan in order to enhance the fashion industry of their respective cities, challenging the Parisian role. We seem to be in presence of a phenomenon of mimicry.

Prior to the health crisis, topics of discussion in the trade press focused on the dates of parades in different cities. Another topic of discussion was that of the availability times of the products presented (so was the debate in 2016 about the implementation of S*ee Now, Buy Now*, i.e., the possibility of making available for sale immediately what is presented during the week of the collections). Ultimately, these debates did not lead to a change in operating rhythms.

Due to the health crisis, the summer 2020 collection presentations in Paris have changed shape. From physical shows, we have moved to a fashion week that is both physical and digital combined with a global broadcasting ecosystem. This system has allowed us to maintain the presence of Paris in a modern way. In any case, the event has not been suspended but has been reshaped and is moving towards a phygital format.

Beyond the digitalization of the fashion shows in reaction to the health crisis common to all fashion capitals, we note different initiatives depending on the city. These initiatives seem to be aimed at retaining or bringing back established brands. The means used are to insist on the national character of the collections (as in New York), or to seize the opportunity of a very favorable economic situation to promote local actors or even to welcome foreign actors looking for visibility on this market (as in Shanghai).

In New York, the *Council of Fashion Designers of America* (CFDA), chaired by Tom Ford, has decided to reorganize its collection presentation week, with the New York Fashion Week calendar becoming part of the American Collections Calendar. The company, which until 2014 was in charge of the collections calendar in New York before was taken over by the CFDA in 2014. On May 13, 2021 was announced an alliance with 11 American designers (Telfer, Rodarte, Proenza Schouler, Altuzarra, Brandon Maxwell, Prabal Gurung, Sergio Hudson, Monse, Jason Wu, LaQuan Smith and Markarian). The brands are committed to presenting during New York Fashion Week for the next three seasons. Three of these brands (Rodarte, Proenza Schouler and Altuzarra) had in the past integrated the calendar of collectionsin Paris, namely temporarily the calendar of the couture for Rodarte and Proenza Schouler, and, as part of the ready-to-wear for Altuzarra. It is difficult at this stage to assess the respective proportions of desire (and in particular the opportunity of a very favorable economic situation in the United States) and constraint (practical difficulties in presenting collections outside the United States) in these decisions. Moreover, we can ask ourselves what place there is in this system for designers whose houses are not based in the United States.

As far as Shanghai is concerned, its fashion week is part of the city's tourism development policy. Thus, the showrooms of the fashion week are open to the public. Platforms are specifically dedicated to local designers. Shanghai Fashion Week thus seems to take on a rather specific character, through its close connection with national and local economic policies, and through the organization of events that closely mix BtoB and BtoC. However, we can ask ourselves questions about the meaning of the presence of certain actors: for example, are the BtoB Brands (industrial brands) adapted to the requirements of a fashion capital? Furthermore, is the presence of European brands in fashion weeks likely to increase or is it just a one-off eventlimited in scope?

It is interesting to notice that the digitalization did not allow new capitals such as Helsinki, to challenge the influence of London, Milan, New York and Paris as fashion capital cities. The ecosystem of these cities proved to be resilient.

The structuration of organizations who are now ancient and quite established helps in our opinion to maintain this influence. Hence, in France the *Fédération de la Haute Couture et de la Mode* was created in 1973 which is quite recent, but one of its component: the *Chambre Syndicale de la Haute Couture Parisienne* was created in 1911. In Italy, the *Camera Nazionale della Moda Italiana* was born in 1958. In New York, the *CFDA* was created in 1962. It is in London that the professional body in charge of the fashion week is the younger because the *British Fashion Council* was created in 1983.

The consumer became a part of the fashion week thanks to the possibility to livestream most of the fashion shows. Designers became to express themselves more. For example, in Paris, the Fédération de la Haute Couture et de la Mode developed a partnership with the television channel *Canal Plus* and released interviews of designers during the Paris Fashion Weeks.

We can globally notice that technology, through its digital aspect, has been more and more used.

Discussion

The results of this study show a trend towards a specific positioning for every Fashion Week. Thus, domestic specificities are more taken into account.

New players apart from the four main fashion capitals have taken an interesting role. Hence, the Shanghai fashion week is a case of a specific positioning, aiming the domestic market and combining BtoB and BtoC.

The Copenhagen fashion scene is making a specific focus on sustainability. And more globally, the trend towards sustainability has become a reality. At the same time, New York and Shanghai are more willing to address local markets and local designers. Locations are still present, but the digitalization changes their perception. Choices have been made between keeping presenting real collections and showing films. The four main fashion capitals made a strong shift toward digitalization.

It is rather the logic of Field-Configuring Events that should be followed. Fashion capitals are sometimes temporary, but this temporary character does not harm their strength, it allows them to integrate new actors from around the world. In this perspective, the Federation of Haute Couture and Fashion and other actors continue to organize the Field Configuring Event in fashion.

The crisis of COVID-19 had to be managed by the four fashion capitals. Above all, it has changed the status of the fashion show, which has lost its imperative character. Paris has both a specificity: haute couture and a more general ambition: world capital of fashion. We can also see that there is now a disconnection between the places of consumption, which are increasingly located in Asia, and the places of demonstration, which are therefore located in Europe and North America. But this disconnection does not bother the existing fashion capitals.Indeed, these cities are not required to be year-round fashion capitals.

Conclusion

This study gives a new perspective on the way a Field Configuring Event (FCE) (Meyer & al., 2005) can be envisioned. Hence this study challenges the idea of the relevance of one single event and highlights the asset for an industry of having rather a range of events.

Marshall's theories describe well the first decades of the functioning of Parisian couture. We can see that geographical logics have their limits: the fashion capitals are so because at certain moments, the presentations of collections, they are visited and or arouse the interest of important actors in the fashion world. The places of demonstration are indeed no longer necessarily linked to the places of production. It is rather the logic of Field Configuring Events that must be followed. Fashion capitals are sometimes temporary, but this temporary character does not harm their strength, it allows them to integrate new actors from around the world. In this perspective, the Federation and other actors continue to organize the Field Configuring Event.

The decrease in travel should not necessarily change this situation. A clever use of digital tools allows fashion capitals to maintain their pre-eminence. It remains to be seen how long these digital tools will be closely or distantly linked to the place in the imagination of consumers. It remains that the arrival or not of professional buyers and fashion actors in general is an important factor of competitiveness. The year 2020 and the first six months of 2021 have seen initiatives flourish in the various fashion capitals. These initiatives have of course resulted in a growing rise in digitalization. Outside Europe (in China and the United States), they have also aimed to affirm the strength of fashion centers that benefit from a very favorable economic context.

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