

Fashion education – fast forward

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Abstract

The audience views some exquisitely created textiles from India and some basic questions are placed before them, followed by a case study of the Indian Kota Doria fabric. This prelude brings forth the grim reality of the textile and clothing industry today, in India and many other nations. The multiplicity of markets and insatiable consumer wants has already necessitated a faster pace and with the advent of machines, many of the hand skills have already subsided, thus severing these very basic links in this evolutionary supply chain of fashion. Where does this lead us? 1. The inevitable need for speed. 2. Spiralling prices and profits beyond an extreme, and yet the weaver perishes. 3. While the industry incomes are increasing the weaver and the workers survive in near, and even extreme, sweat shop conditions. 4. Classroom-educated fashionists still cannot replace the real creator, for even the most basic skills are often waived and paid as low skilled tasks. Hence, the apprehension that the extreme nature of the runaway fashion industry is leading to an ‘apartheid’ of an extreme kind – in terms of income, education and social implications. So is it a case of human sensitivities, or there is a hardcore practical business strategy underlying this whole exercise for the fashion industry? We thus conducted a survey, which proves the latter. And with this backdrop, the paper moves on to elucidate our strategy for the future. Is strategy all about low costs, or more about making choices, and what is apt for the fashion industry? Thus where do we begin? If with fashion education, then what should be the USP of fashion education in the future?

Keywords:
fashion education,
fast forward,
a USP for future

Introduction

As we currently are in the 21st century, on the one hand ‘tech-savvy’ words like WAP, LAN, CAD-CAM, ISP and ‘dotcoms’ rule the world, and

on the other corporate policy sees a transformation from global marketing to rural hubs, and bottom lines seek to graduate from profit metrics to CSR (Corporate Social Responsibility). The power is shifting from the Western blocs to the 'Asian tigers' and the textile sector is hobbling under the post-MFA (Multi Fibre Arrangement) seismic waves.

The textile industry is one of the first to develop a link between fibre and fashion. It was once known for creative energies, craft ingenuity, cultural hues, religious sentiments, irreplicable skills and design devotion culminating in exquisite and high-quality commissioned clothing. Today textiles are a battle for livelihood, a war between the 'haves' and the 'have-nots', and a race against time for supply. Be it the *songkets* of Indonesia, *kasuri* of Japan or the 120s-count cotton mills of India, these are textiles which have been and are known and recognised for their employment generation and export earnings, and have given to each country its recognition in the world of fashion.

This article deals with this very humane and sensitive aspect of the value chain of the textile and clothing industry, and has drawn the attention of several researchers, policy makers and experts who have incessantly tried to awaken human sensitivities, yet today the fate of those possessing these hand skills is hanging by a thread. Hence this paper, with great deliberation, tries to avoid echoing any sentiments, but instead voices a business strategy for the industry's quest for returns.

Prelude

In the words of John Gillow, "No other land enjoys such a profusion of creative energies for the production of textiles as the sub continent of India." The audience thus views some exquisitely created textiles from India not just unique to our country, but a future for global fashion, and some questions are asked.

Our questions:

1. Do we wish to wear these in some form or another?
2. What price can we pay for these?
3. According to you, what portion of this goes to the weaver or other skilled or semi skilled workers in the value chain?
4. Would you like to do them in a dark sweaty home-cum-workshop with near-survival conditions?

5. Can we do it otherwise, and for how much?

Innumerable original Indian textile weaves such as these are extinct, either because tradition or transmission has not been revived, or because they have not been able to adjust to the pace of transformation. With the onslaught of the power loom, shortened supply chains and a fast moving fashion industry, many important fine cotton-weaving centres have gone into oblivion, or been replaced by the power loom. Except, that is, for a few, which remain a visual reality, and along with them the lesser-known and less-understood skills. A gift of the nineteenth-century, Kota Doria faces extinction.

A case study of Kota Doria

Kota fabric from Rajasthan in Western India is one such exception, and it is struggling for existence. This fabric is known for its corded effects by cramming the warp and the weft threads in an affixed count and pattern. The cluster produces a wide range of fabric with extra weft motifs and borders in the form of a traditional Indian wear called the five-yard wonder – a sari. It also produces some apparel fabric and stoles. The product is either a simple fine cotton netted fabric (with the sheer pattern of cording exemplified) or is fine gossamer of cotton or gold threads interspersed with delicate motifs suited for niche markets.

The value chain analysis

Let us examine the value chain of this product. For the purpose of our analysis, three different product categories have been considered:

- A prêt (daily) wear sold through the traditional marketing network with the design inputs from the weaver himself. (Diagram1)
- A mid-end product marketed through a city retailer where the directions related to design and colors are given by the retailer. (Diagram 2)
- A high-end designer product commissioned and sold by the designer, who also provides specifications such as layout and construction, besides colors and pattern. (Diagram 3, overleaf)

Stakes are assumed to be equal to incomes earned and investments in raw material, capital, etc. in this analysis.

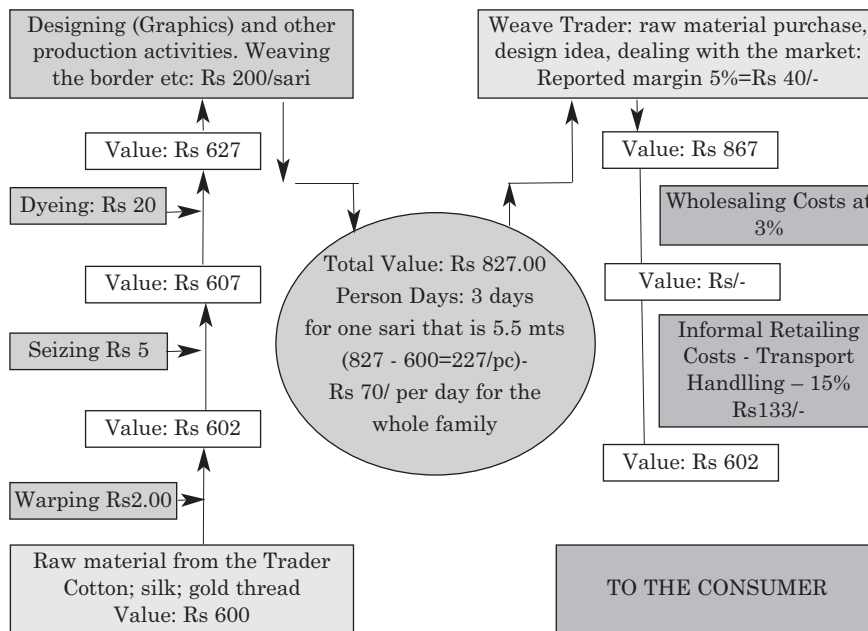


Diagram 1.

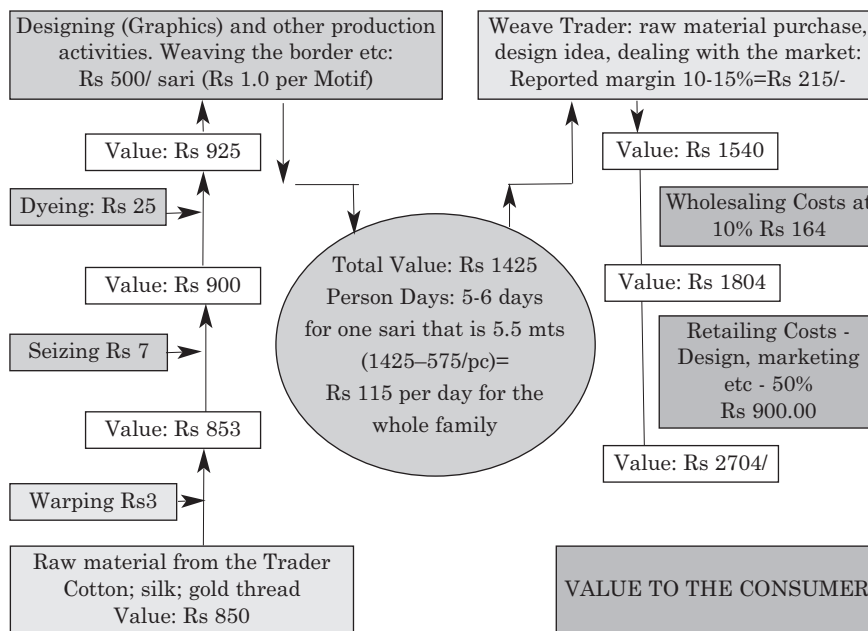


Diagram 2.

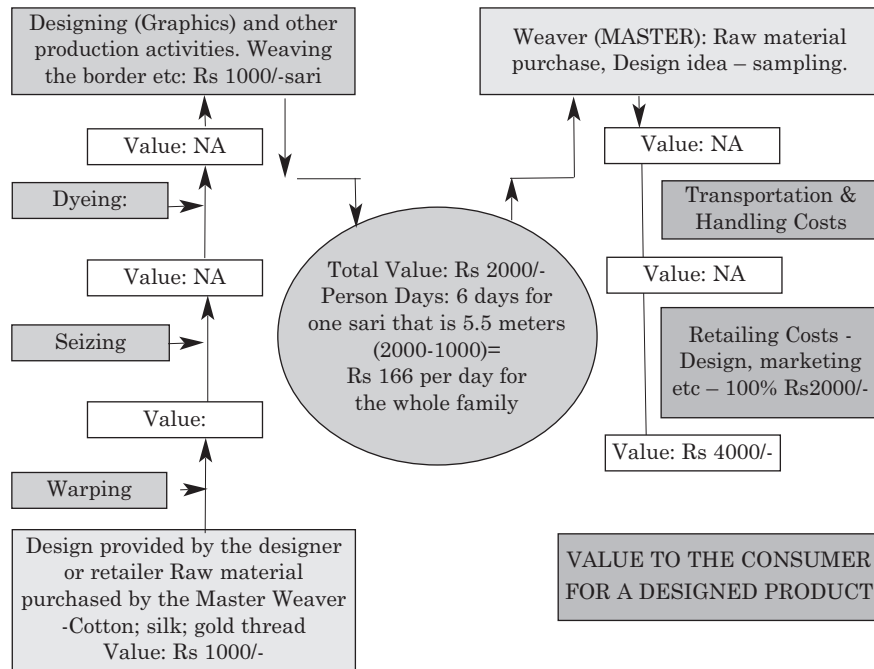


Diagram 3.

Analysis of the value chain

These value chains were analysed with respect to three metrics of value addition: the financial stakes of each stakeholder; the person days; and the incomes earned and the parity between them. They also reveal some non-monetary metrics such as the nature, strengths and weaknesses of the links. This analysis is in percentage terms to enable an easy understanding. The following bar charts correspond to the three value chains shown in the previous pages.

The highlights here are:

1. While the weaver and his family are the largest stakeholder in terms of person day involvement and value of the stakes, his earnings are at the least rather unsustainable and below living conditions;
2. The Master Trader or middle-man (who is yet another main stakeholder) also earns less than living wages. Hence he has little or no interest in the complementary flows of the supply – for instance market and product information – as he struggles to maintain some returns on resources. Today, the contractors in a garment or textile processing unit play this role.

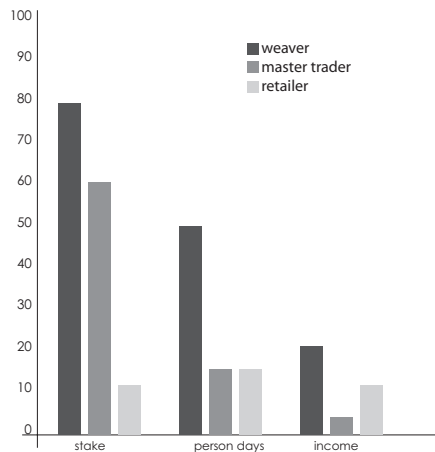


Table 1. Analysis of the value chain of a Pret Kota Doria Sari 45 inches x 5.5 metres

- Even in case of a mid product (Table 2) the producer (weaver) earns a net of Rs. 450 (his total earnings minus costs of yarn preparation.), which amounts to Rs. 90 per day for a family of two weavers and a helper.

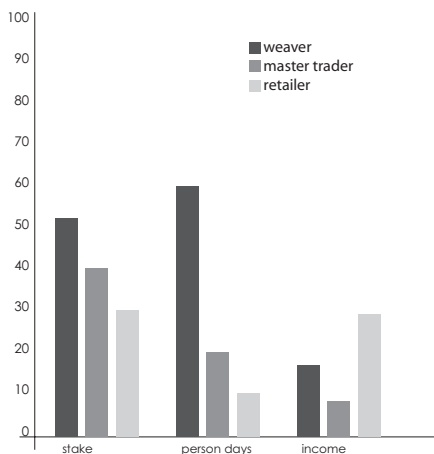


Table 2. Analysis of the value chain of a Mid-end Kota Doria Sari 45 inches x 5.5 metres

- For a designer or labeled product, his earnings change only marginally (Table 3), as the slightly higher payments are offset by the extra days required to sample and weave these products. Simultaneously his stakes increase disproportionately to his earnings.

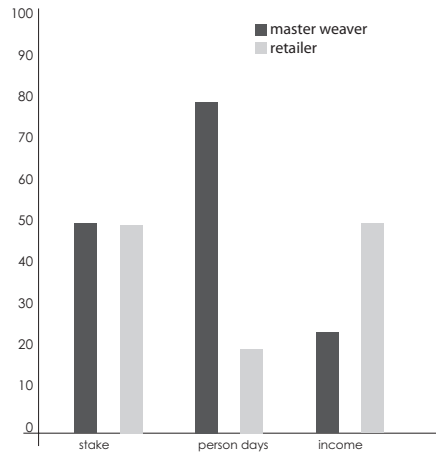


Table 3. Value chain analysis of a designer Kota Doria Sari 45 inches x 5.5 metres

5. This low-income situation is slightly improved by weaving simpler and prêt products, as in the case of the first chart.
6. There is no reciprocal transfer of skills, knowledge or information back to the weaver: only feedback of rejected goods, and hence rejection as a supplier or skill provider.
7. A cloud of uncertainty is all-pervasive with respect to the market – particularly at the back end – and the weaver is unable to distinguish between a high-valued design and a high-value-added design.
8. The retailer or designer desires to minimize his risks and uncertainties by back-loading stakes such as raw material, etc., or by dealing with contractual skills.
9. Hence, technological intervention is conspicuous by its absence.
10. Added to this, the multiplicity of demand and insatiable consumer wants have already necessitated a faster pace and the advent of machine copies.
11. Subsequently any efforts to retain these skills are unsuccessful.

This is the grim reality of our evolutionary supply chain in India and many other countries, where the evolutionary value chain of the textile and clothing industry has similar characteristics.

Why?

Why is this still happening now, in the heyday of globalization, booming domestic markets and more than a dozen seasons annually? To survey the past:

- Hand-skilled textiles and clothing are by nature commissioned textiles;
- Every piece of textile and garment is distinguished by its uniqueness, which is a culmination of the versatile human mind with the help of versatile skills;
- These skills were not only handed down the generations, but also across cultures and countries, and from the hand to the machine;
- Tomorrow was not certain, hence mind and skill were entirely dedicated to creativity that the worker could improvise and innovate;
- The worker then had time and technology in his hands, hence he was awarded;
- From 1658 (Fair of Saint Germain), hand printed, painted and sheer woven cottons ruled French fashion for 80 years;
- Competition, however, was despised by the importing countries ('les indiennes' for instance were honoured by imitation);
- By the eighteenth century the copper plate had usurped the delicacy of the industry, whether in the United Kingdom or the Indian sub continent;
- Hand skills retreated from attention, especially when issues of mass requirements supply and wholesaling were being discussed: there was no investment and the worker's capital depreciated;
- More shirting and dress materials by the yards were produced, with the subsequent loss of niche skills;
- The mills increasingly borrowed hand skills;
- These hand skills were largely lost at the hands of technology and spiraling and accelerating fashion. The multiplicity of markets, consumer wants, and fashion dynamism necessitated a faster pace and thus hand skills further subsided;

- When the International Colour Authority met in the sixties, it was to impart a direction, two years hence, to the technologically-perceptive weaving giants so that they survived, and soon these predictions became prescriptions for profits and success, and individuality lost to uniformity;
- The creativity and skills of the crafts persons were substituted by the presence of a designer in a controlling position in an avant-garde firm to provide some diversity;
- Now we ask the latter to copy the mills. Although these skills of designing and creation existed as far back as mankind itself (or even before) we thought of conceptualizing, formalizing and teaching it for the sake of fashion. Only the pace was different. Today we have severed these basic links;
- It was a whole way of life and livelihood, and is more so today: hence the evolutionary supply chain suffered colossal losses from man and technology as there was no investment in alternative skills, the human capital depreciated, and skills as well as the weaver perished. The remainder is now languishing;
- Today we all became responsible for copying skills and technology without providing alternative diversified inputs to enable them continue securing their livelihood. Ultimately, we have created a human bonsai that can grow as much as we desire or require.

Where does this lead us?

1. Bullet-speed fashion changes, which consist of a dozen seasons, several forecasts and millions of labels. Yet we all look 'uni'-formed!
2. The inevitable need for speed has limited quality and workmanship in many ways. *Haute couture* is inaccessible.
3. Prices have spiraled beyond an extreme (as seen in the case study) and yet the weaver perishes.
4. While industry incomes soar, the weaver and the workers still survive in near-sweatshop conditions.
5. Classroom-educated fashionistas cannot replace the real creator for even the most basic skills, which are often waived and paid as low-skilled tasks.

The observation arises that the extreme nature of the runaway fashion industry is leading to an ‘appartheid’ (derived from *apparel* and *apartheid*) of an extreme kind – in terms of incomes, education and social implications. Labels and dress codes are gradually cutting the roots of their very own evolutionary value chain.

The survey

This led to me wonder whether this is a case of human sensitivities, or whether there is a hardcore practical business strategy underlying this whole exercise for the fashion industry? We thus conducted a survey, and the survey proved the latter. (The survey included respondents comprising: processors; weavers; traders; self-help groups; designers; merchandisers; marketers; policy makers; and members of educational institutes, NGOs and promotional bodies.) The respondents answered queries relating to the macro, meso and micro aspects of the textile and clothing fashion industry. The key highlights of this survey follow.

Macro scenario

The fashion industry spearheads the primary sectors of cotton growing, wool rearing and silk production, processing, weaving, and finishing, to name but a few. Its very basic links – the value-adding skills, weaving and processing industry – are a heterogeneous mix of a myriad of semi-skilled, hand and machine activities, both organized and unorganized, and we cannot ignore these. Secondly, the process from textile to apparel is highly labour-intensive in nature because of the very fact those two-dimensional textiles have to be assembled to fit three dimensional body shapes, or converted to home and industrial textile products. This is relevant even today. Subsequently it is one of the largest employers of human workforce, besides being one of the largest consumers of water and electricity, and one of the the largest polluters of water and the environment all along the production chain.

A recent World Trade Organization mandate sought to protect some nations and their workforce and industries, many of which (ironically) hardly exist today, or they have moved up the value chain to produce mechanized mass goods from fibre to fashion. Wage differences have become the key factor in international competitiveness, and have led to a mass movement of production from developed countries to developing ones. Moreover, downward price pressures mean a movement from

unique value-added products to run-of-the mill marketable verities. Now with the loss of the MFA there are many who gain – the consumers and the marketers – and yet still the same many are at stake, be it in the U.K. or in Asian countries.

India, for instance, may be the fastest growing domestic and export economy at approximately 9 percent per annum, but its share in world exports is just 0.7 percent. The textile industry is the largest foreign exchange earner, and the second largest employer in the country (Texprocil: www.texprocil.org); it is the second largest producer of silk and the third largest producer of cotton, but the industry is also characterized by subsistence levels, an absence of minimum living earnings, illiteracy and low per-capita incomes. As developing economies strengthen they move from primary to manufacturing products, and a large portion of their hopes are on textiles as their first industry since it is a natural outcome of agricultural and artisanal activities. Yet today hi-tech manufacturing has more growth, momentum and profits, more equitable distribution of wealth, better productivity and better quality, whereas the more labour-intensive manufacturing processes are facing disruption as they have continued to invest only in labour-saving equipment.

Meso scenario post liberal 'realization'

World demand with respect to fibres for consumption is still 50:50 for cotton versus manmade, but the production of cotton fibre and fabric is decreasing. Trade liberalization has often undermined agricultural production, be it of food or fibre. Added to this, the theory of price competitiveness continues to exert a downward supply pressure in an oversupplied market of human labour, increasing the dependence on migratory labour. Today several countries face the problem of inappropriate skills, be it India or China, and be it domestic factories or multinational textile and clothing companies.

On the other hand, liberalization will stimulate production where there is a competitive advantage. As for many Asian countries and their labour-intensive sectors, operational efficiencies will determine competitiveness, hence vertical integration and scales of production are important. However, the textile and clothing industry is a myriad mix of organized and semi-organized linkages, and the small-scale or

artisanal mode has its downsides such as variations, average quality, contractual employment and low productivity. Its flip side is characterized by flexibility in production, competitive labour for specialized skills and low volumes; smaller runs are all prescriptions for *haute couture*.

Many of the inherent skills in this industry have more than helped it recover from the disaster and onslaught of the foreign loom. In fact the special quality of Indian embroidery, the ability to respond to changes in demand for new and innovative designs, and the uniqueness of its dyes even today are the mainstay of India's foray into the global fashion arena.

At the micro level

- Traditional strengths of skill with their inherent flexibility of production are difficult to replicate, and yet they are languishing;
- Textile industries such as those in India (South East Asia) have a good starting position, and we should leverage current capabilities;
- Managerial insensitivity – such as over-commitment with respect to time and prices – often reflects on quality;
- Seasonality of demand has led to a dependence on contractual temporary work force, with few entry-level skills;
- Training is on-the-job, and structural training exists for middle and top management;
- Mass good marketing is an easier way out: we have an alternative strength;
- Training at entry-level skills is required: this will strengthen the existing supply chain;
- Our weakness is in commodity products, and our strengths are in *haute couture*: hence we are losing our product competitiveness;
- Now there is a trend towards diversification and high-value-added products which require upgraded technology, and therefore appropriate skills are required. We already possess rich skills for niche products: we need training to produce standardization;
- By concentrating on front-end initiatives, we have ignored the back-end ones like ensuring a educated and skilled labor force;

- We are facing challenges on many fronts: cost competitiveness, quality styling, service enhancement and eroding cost advantages;
- Rather than compete for the three-dollar shirt market we should be looking at products which provide a level playing field;
- Infrastructure difficulties make delivery schedules difficult for mass products, therefore we should up-scale to richer and fewer pieces.

Our strategy for the future

The backdrop here is a strategy all about low costs, low prices. Is the fashion industry all about supply chains and profits, or is there more to it?

As Michael Porter says, strategy as distinct from operational effectiveness is more about making choices, trade-offs and choosing to be different, whereas the latter is about total quality, 'just-in-time' and fast growth, and this distinction is very significant for the fashion industry.

A company or industry without strategy is without choices, and willing to try everything that is essentially doing the same thing as anyone else: and this way one actually cannot do better for very long. Particularly when the flow of information and knowledge transfer is incredibly fast, we cannot bet on the operational incompetence of our competitors. This leads to a destructive form of competition, and eventually – if everyone is trying to get at the same place – inevitably the choice is price and the net result is cratering of prices.

Post-MFA and globalization (breaking down of barriers), the competition is not within economies but within companies. Thus, the onus is on each stakeholder in this chain to develop a sound strategy with the right choice for a right goal—a value proposition—that speaks of superior profitability, and profitability that is spread all across the value chain of textiles and clothing. Will then the quest not be just for returns, but also for returns on resources over and above their real cost? Once these depreciate, or become obsolete or are imitated, returns disappear.

So where do we begin?

Thus our value proposition is rooted in a system of activities that are much more difficult to match. From the Central Bureau of Importing

Countries, 'knowledge' is a major factor determining international business: traditional strengths in product market positioning are being supplemented with the capacity to create and utilize knowledge as an enduring non-imitable source of comparative advantage. In addition, this value proposition will form our base for future strategy. We may not have a strategy upfront, but we definitely have several macro and micro indicators as discussed above, and various beginnings that have been made in different parts of the world by industry and education to help us elucidate one.

- Economic growth in any sector or industry is contingent on social stability, social stability hinges on economic conditions, and this in turn is directly related to knowledge, which in turn can be classified as explicit, implicit and tacit
- Operates within the realm of possibilities – lets enlarge these
- Many companies today seek to achieve not one but three levels of bottom lines – financial, economical, social and consumers seek brands that are not just about lifestyle but also livelihoods
- Compliance is more about ethical sourcing and codes of conduct and their awareness and implementation across the supply chain
- Number of seasons have increased manifold and domestic markets are a steady source of demand and are growing in contrast to seasonality and ad hoc demands

Our rationale

Tests for a resource to qualify as a basis for strategy such as 'inimitability' justify this beginning. Hand skills form an indispensable knowledge base for our industry. Infact in the words of Meinkolf Dirkes "fashion and arts are deeply rooted in tacit knowledge between individuals, groups and communities." Further, all skills have a life cycle like any other product or service and this needs to be managed. These skills could either be in the embryonic stage or established stage or in the stage of maturity or the state of decline. Hence, programmes and interventions are needed:

- To fashion the hand skills with respect to understanding, absorbing & reconsidering them in contemporary context

- Finally to convert globalization into rising incomes it is not just volumes but value addition by
- Firming up the present supply chain and
- Moving up the value chain and
- Entry into new supply chains

USP of Fashion Education

Supporting the creation and growth of a versatile work force.

As the future lies not in, relinquishing these skills or pruning them to death but building these capacities to enable them meet the challenges of the future. Creating versatile skill sets ranging from product design process to market perceptions; for the weavers and workers so that they can not only contribute to the value chain with greater effectiveness but also be alternatively employed at different levels of the value chain laterally or vertically.

Transforming mindsets and attitudes

Post MFA as the competition shifts from country to companies, responsibility shifts too and in terms of educational, monetary and reaching out initiatives. As the current educational systems are supply push rather than demand based and available to those who can reach them. This requires a need assessment system from the grass roots for education based on participative research for institutional action. A combination of push and pull factors, pull factors which require literacy and versatility of these skills and push factors which support these initiatives.

Beyond the classroom

Responsible education programmes go beyond the classroom not only for skill learning but for real-life understanding both by the trainers and by the students. Understanding the impact of industry on environmental concerns like scarcity of water and power, pollution and human cancers. Pricing strategies that take into account not the cost plus formulae but the opportunity cost of water that has gone into the production of the product and not for production of food or for drinking. Costing which does not merely include the existing wages to maximize individual profits but the projected human wage which benefits the chain.

Fashion education needs to proliferate and impart these skills and requires.

- Mandatory shop floor apprenticeship in the hand producing clusters as well.
- Procurement and vendor management to include not just urban retail visits but also to focus on understanding the procurement realities from the initiation of the supply chain.

Industry mandate

It is not enough for fashion industry to have a mandate of accounting metrics if we are seeking superior profitability. According to Gary Gereffi “the textile and clothing industry being a buyer driven commodity chain, the retailers and buying houses play a leading role in setting production networks and since these can be subcontracted and alternatively relocated the skill supplier loses his bargaining power.”

The solution is not to apply price reducing pressures instead to accommodate pricing of a scarce resource like education and skill enhancement not only for better living and working conditions of the weaver and other workers alike but enhanced productivity and idea generation.

It is not sufficient for the buyers to discriminate against high production costs but to transfer cost effective and skill enhancing education technology to these producers. Infact the UNDP report has clearly visualized the worst hit post MFA as the low skilled and traditionally highly skilled women workforce which still form the backbone of the fashion industry. Thus, labor restructuring through education thereby creating a new workforce more efficient, productive and sustainable.

And what we are talking of here cannot be achieved in isolation by the producers and suppliers of fashion because the economies and consumption of each one of us is linked to the other. Enabling widespread information dissemination and practice of labor laws throughout the value chain and for all stakeholders, far from being just a USP for brand promotion will prove to be a real reason for brand loyalty. It is time that business process is replaced by thought and skill process, where art and skill is substituted for the name and price tags are mindful of the hand skills. We often display our designs on the ramp for profits and the hand

skills in the museum for passion. Today we are deskilling those who skilled us without any motive let us re-skill them with a motive. Our quest for returns should be more a return on resources which confers this advantage because once these depreciate or become obsolete or are replicated, rents or profits disappear (Michael Zack).

Conclusion

I am grateful that it has been able to find a voice in this forum on Extreme Fashion. For yes, this extremity has been committed. Which has led us to a dilemma where the demand for irreplaceable skills exceeds the availability, and yet the in valuable contributors of these skills perish for lack of opportunities. Migratory substitutes provide us with cheaper alternatives and we have landed in a vicious circle of low skills, low productivity, low prices, and low incomes and so on.

Surely, that was not the best value proposition, neither was this intended when we began learning, studying, practicing, and mechanising these skills, imbibing design and technical creations and formalizing them into profit books. I am not pleading human sensitivity. Instead, we are looking at a viable value proposition for a competitive strategy leading to a virtuous circle for all. Like the ICA came to the rescue of the textile giants in the sixties to provide them a direction, perhaps IFFTI could be the forum for fast forwarding fashion education and catalyzing a public private partnering in this direction.

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