

**EMERGENCE OF SUSTAINABLE MARKETS:
DYNAMICS THAT MOBILIZE ACTORS TO SEEK MARKET CHANGE
IN FASHION**

ZEYNEP OZDAMAR ERTEKİN

JANUARY 2016

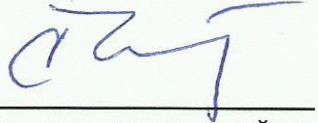
**EMERGENCE OF SUSTAINABLE MARKETS:
DYNAMICS THAT MOBILIZE ACTORS TO SEEK MARKET CHANGE
IN FASHION**

**A THESIS SUBMITTED TO
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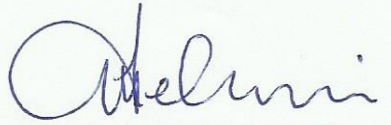
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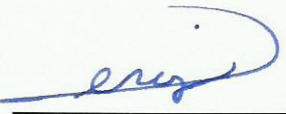

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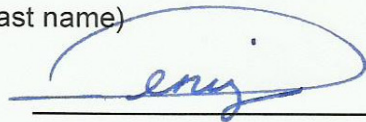
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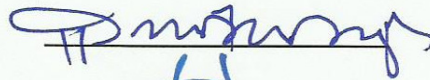

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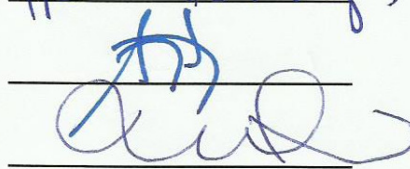
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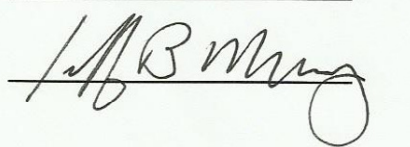
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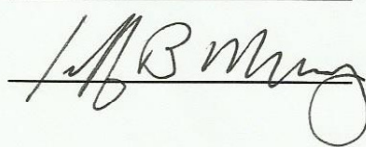
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ABSTRACT

EMERGENCE OF SUSTAINABLE MARKETS: DYNAMICS THAT MOBILIZE ACTORS TO SEEK MARKET CHANGE IN FASHION

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The current fashion system based on speed of availability and offering latest fashion trends at affordable prices has negative outcomes on ecological and social environment, posing a threat for future generations. The purpose of this dissertation is to provide a theoretical explanation of how a new sustainable market emerges within the context of fashion, focusing on institutional actors as the initiators of marketplace dynamics. Ethnography, with emphasis on participant observation and interviews, is used as a research method to examine the conditions in which fast fashion actor-network is subject to major translations. Secondary data on sustainable fashion practices and companies is used to support the findings. The study helps to understand the dynamics that mobilize actors to seek market change; the barriers and driving factors in market mobilization; and the initiators of change in market formation. Philosophical concerns, social, economic, and environmental consequences and criticisms of fast fashion facilitate the emergence of a sustainable fashion actor-network, leading to creation of a new market. Sustainable fashion market seeks to expand not resist the prevailing industry logics of art and commerce. Purposeful actions of institutional actors facilitate the establishment of the new "logic of sustainability." The study contributes to literature on market system dynamics, institutional theory, and actor-network theory by having a more macro perspective of market formation, focusing on institutional works, actors, and logics.

Keywords: Sustainability, Fashion, Market, Institutional Theory, Actor-network

ÖZET

SÜRDÜRÜLEBİLİR PAZARLARIN OLUŞUMU: MODA SEKTÖRÜNDE AKTÖRLERİ PAZAR DEĞİŞİMİ İÇİN HAREKETE GEÇİREN DİNAMİKLER

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En yeni moda ürünlerini, uygun fiyata ve hızlı bir şekilde tüketiciye sunmaya dayanan hızlı moda sistemi, ekolojik ve sosyal çevre üzerinde olumsuz etkiler doğurarak sonraki nesiller için bir tehdit oluşturmaktadır. Bu tezin amacı, pazar dinamiğinin öncüsü olarak kurumsal aktörleri inceleyerek, moda sektöründe sürdürülebilir pazar oluşumuna teorik bir açıklama getirmektir. Katılımcı gözlem ve mülakat tekniklerini içeren etnografik araştırma yöntemi ile hızlı moda aktör ağındaki değişime sebep olan koşullar ve dinamikler araştırılmıştır. Ayrıca, sürdürülebilir moda uygulamaları ve firmaları ile ilgili ikincil verilerden yararlanılmıştır. Çalışma, pazardaki değişim arayışı için aktörleri harekete geçiren dinamikleri; pazarın mobilize olmasını engelleyen ve teşvik eden faktörleri ve pazar oluşumundaki değişim öncülerini anlamaya yardımcı olmaktadır. Sürdürülebilir moda aktör ağı ve pazarı, felsefi kaygılar, sosyal, ekonomik ve çevresel sonuçlar ve hızlı modanın eleştirileri sonucu oluşur. Sürdürülebilir moda pazarı, sektördeki yaygın sanat ve ticaret mantıklarını reddetmeyi değil genişletmeyi amaçlar. Kurumsal aktörlerin amaca yönelik eylemleri, pazarda yeni bir sürdürülebilir mantığın oluşumuna olanak sağlar. Çalışma, kurumsal eylemler, aktörler ve mantıklardan yararlanarak yeni pazar oluşumuna kapsamlı ve makro bir bakış açısı getirerek pazar sistem dinamiği, kurumsal teori ve aktör ağı teorilerine katkıda bulunmaktadır.

Anahtar Kelimeler: Sürdürülebilirlik, Moda, Pazar, Kurumsal Teori, Aktör ağı

To My Father
Prof. Dr. Nurcan ÖZDAMAR

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1. INTRODUCTION

The "dominant economic paradigm" centered on unlimited economic expansion equates human welfare to increasing material well-being (Kilbourne et al. 1997). Therefore, progress, desire for new, and change are highly valued, and consumers are driven to purchase continuously, especially in Western societies, to keep the capitalist system alive (Fiske 1989). However, these excessive consumption patterns have led people to spend to the detriment of their families, communities, individual well-being, and the natural environment (Taylor and Tilford 2000).

Fashion industry is one of the industries that have been related to exploitation of both resources and people. The current fashion system requires rapid and continual changing of styles; frequent renewal of products; speed of availability; greater variety; and affordable prices, so that the market constantly grows (Wilson 1985). Consequently, consumption of textiles increased. Clothing, which was once regarded as a higher-priced good that is made to last for a long time, has become a disposable item, with little attention being paid to its quality and craftsmanship (Cline 2012).

There are economic, societal, and environmental consequences of this mindless and ubiquitous fashion consumption (Biehl-Missal 2013). Fashion industry, especially clothing production and consumption, has been criticized for exploitation of both consumers and workers, damaging the ecosystem and the environment, contributing to depletion of natural resources, and increasing textile waste (Wilson 1985; McRobbie 1997; Beard 2008; Fletcher 2008; Morgan and Birtwistle 2009). Over the last thirty years, there has been growing awareness of the impact of fashion consumption on both people and environment (Beard 2008), and there are calls to re-design the current unsustainable fashion system (Fletcher 2007; Clark 2008; Cataldi et al. 2010).

The purpose of this dissertation is to understand how new markets emerge within context of fashion and the influence of multiple actors on this market change. The creation of new markets is a complex process. It is not only firm or consumer-driven. It is a cultural, political, and social process, acknowledging the importance of different stakeholders (Humphreys 2010). However, studies that include different actors of the fashion system are limited. Most of the prior studies on sustainable approaches to fashion are either conceptual (i.e. Beard 2008; Clark 2008; Winge 2008) or mainly carried out with consumers (i.e. Pears 2006; Niinimäki 2010; Joy et. al. 2012).

Rather than pursuing a dichotomous view of market emergence, this study aims to provide a more comprehensive perspective of market formation and benefit from institutional theory, actor-network theory, and market system dynamics approach, to give a theoretical explanation of how new markets emerge within the field of fashion and how institutional work, logics, and actors contribute to this market change. In this regard, it examines the dynamics that mobilize actors to seek market change; the initiators of change and their roles in market formation; and the barriers and driving factors in market mobilization.

Furthermore, most of the recent studies on market dynamics examined consumers' role in market creation or market change (i.e. Thompson and Coskuner-Balli 2007; Giesler 2008; Sandikci and Ger 2010; Scaraboto and Fischer 2013; Martin and Schouten 2014; Dolbec and Fischer 2015). In some of these studies, consumers resist prevailing market logics and refuse to contribute to profits of mainstream marketers (i.e. Thompson and Coskuner-Bali 2007; Giesler 2008). Rather than taking an activist bent, this study aims to explain the formation of a new sustainable market within fashion industry. Similar to recent studies of Scaraboto and Fischer (2013), Martin and Schouten (2014), and Dolbec and Fischer (2015), the research seeks to expand, not reject the logics of an existing market. However, unlike these studies it focuses on market emergence driven by institutional actors, not consumers.

Fashion industry is chosen as a context to study market formation, as fashion represents elements of contemporary society and has become a prominent part of the modern marketing institution, affecting many aspects of our lives (Atik and Firat

2013). Furthermore, as the process of fashion entails complex interactions, exchanges, and influences among different actors that are a part of the fashion cycle (Davis 1992), it is a suitable context to study emergence of a new market. Ethnography, with emphasis on participant observation and interviews, is used as a research method. Furthermore, secondary data on sustainable fashion practices, brands, and actions is used to support the findings.

Within this perspective, the study starts by providing an overview of consumer society critiques; historical perspective to fashion and clothing; and actors, subfields, and logics of fashion institution. Then it describes the dynamics, consequences, and criticisms leading to emergence of a sustainable fashion market. New market formation process is explained using market system dynamics, actor-network theory, and institutional theory. The study concludes by providing remedies and marketing implications; theoretical contributions; and limitations and future research opportunities.

2. LITERATURE REVIEW

Examining the philosophical and historical conditions and debates helps us to understand consumer society, the current consumption habits, and factors encouraging institutions, companies, and consumers to prefer more sustainable practices. In this respect, this section presents an overview of consumer society critiques followed by alternative approaches to consumer society.

2.1 Consumer Society Critiques

There has been an ongoing debate on the driving force behind consumer society. Whether it is the corporations that determine what consumers want through marketing and advertising or it is the consumers who determine what the corporations must offer to survive (Shor and Holt 2000). The economic critiques of consumer society argue that capitalism needs consumers who are driven to purchase continuously. The development of capitalism and the rise of giant conglomerates and multinationals, created the need for the modern corporation to control consumer demand and desire (Hebdige 1988). New production techniques and technologies accelerated mass production and the capitalist corporations mainly focused on controlling consumer demand and creating needs for new goods (Kellner 2006).

Similarly, Galbraith (1958) pointed out that the production of goods satisfies the wants that it creates. Institutions of modern advertising and sales help to create and satisfy the desires that did not exist previously. Consequently, in mass culture, consumers are provided with mass-produced products and identical needs are satisfied with identical goods. Even art is reproduced for the masses, requiring imitation to be unavoidable. Therefore, mass production is criticized for lacking quality, taste, and creativity (Shor and Holt 2000).

The economic critiques of consumer society focus on the profit motive of the corporations, whereas the cultural critiques mainly concentrate on manufacturing meanings and identity, rather than wants and needs. Baudrillard (1969) articulated

the theory of production of social meaning through commodities. According to him, consumption is "an active manipulation of signs," to differentiate oneself from others (Kellner 2006, p. 6). As consumer goods are able to carry and communicate cultural meaning, they have a value that is beyond their utilitarian and commercial value (McCracken 1986). Baudrillard called this regime the "sign-value," according to which commodities are not only characterized by use-value and exchange value, but also by sign-value, expressing style, prestige, luxury, and power (Kellner 2006). Similarly, fashion items also have a symbolic or sign value and are used as an identity resource, which often becomes a rationalization process for fashion consumption.

Everything in capitalist society is reproduced as an element of the system. Needs could no longer be defined as innate, instinctive and spontaneous. Instead they are generated and required by the system (Baudrillard 1969). Therefore, consumption does not arise from an objective need of the consumer. Instead it is socially produced in a system of exchange and of signs. Baudrillard's "symbolic exchange," is an alternative to the values and practices of capitalist society, such as utility, production, monetary profit. It refers to symbolic or cultural activities which do not contribute to capitalist production and accumulation (Baudrillard [1973] 1975; [1976] 1993).

These critiques of consumer society not only focus on quantity of consumption but also on consequences of consumption. Consumption has become means to differentiate oneself from others (Baudrillard 1969). It can structure social difference and inequality. Veblen's Theory of the Leisure Class is the most influential statement supporting this view. Consumption and display of commodities have become means to communicate social position, status, wealth, and class differentiation ([1899] 1994). Similar to Veblen, Simmel ([1904] 1957) also found that consumer behaviors help to express status.

The cultural meaning carried by consumer goods is more complex and various than Veblen's emphasis on status (McCracken 1986). Bourdieu ([1979] 1984), in developing his theory of cultural capital and taste, examined this relationship between class, consumption, and taste in postmodern societies. Unlike Veblen, he showed that cost of an item is not the only differentiator of social class.

Taste and aesthetic disposition is also influential in uniting and distinguishing people and in reproducing class differences.

In advanced capitalist societies it is difficult for consumption objects to signify status and determine class boundaries, due to the overproduction of commodity signs. As Peterson and DiMaggio (1975) stated, "popular goods become aestheticized and elite goods become massified" (Shor and Holt 2000, p.220). In line with Bourdieu's theories, Holt (1998) argued that elites high in cultural capital -with distinctive tastes, skills, knowledge, and practices- seek to construct an individual style, through authenticity and connoisseurship, whereas, those low in cultural capital become a part of the mass culture and mass taste.

By the early 1960s, role of marketers and consumers started to change. Instead of marketers, consumers began to create new trends and meanings and marketers started to have little control over how consumers constructed meaning. Consumers were no longer seen as passive conformers. Instead, they have become resistant and creative. Innovations did not necessarily trickle down from top to bottom. Commodities are therefore not only used to support the economic system of capitalism (Fiske 1989). Consumption, which is now considered enjoyable and liberatory, has become the driving force behind production (Shor and Holt 2000).

Twitchell (1999) is one of the scholars, who stated that consumers may not be passive and innocent victims of commercialism, as people love things. Veblen ([1899] 1994) claimed that if people had fewer choices they would be happier, there would be less waste, and there would be more equality among them. However, he never considered that consumers may have other reasons to purchase things, such as searching for meaning. Therefore, Twitchell (1999) argued that we have demanded consumerism, which can be liberating, democratic, and enjoyable for many people.

Shor (1999) also highlighted that the simple rational-economic model is not adequate when predicting most of consumer behavior, such as fashion consumption. Consumers may not always be rational, well-informed, consistent, or conscious. However, they are not also completely manipulated. Shor referred to the new developments in consumption as new consumerism, which includes: upscaling of lifestyle norms; pervasiveness of conspicuous consumption and status goods; disconnection between consumer desires and incomes; competitive consumption and

luxury becoming an aspiration rather than comfort (Shor 1999, p. 448). As a consequence of this new consumerism, desires outrun incomes and the quality of life is jeopardized.

Development of flexible production technologies enabled production of customized products, providing customers with more choice, which makes it more difficult to escape this commodification in the contemporary marketplace (Shor and Holt 2000). Even art has become commodified and lost its specificity and distinctness, as it is everywhere. "Materialization of aesthetics" has led to imitation and replication of art, which Baudrillard ([1990] 1993) called "transaesthetics." Art is no longer art in a classical or modernist sense but is only an image, artifact, object, simulation, or commodity (Kellner 2006, p. 20-21).

In *The Consumer Society Reader*, Shor and Holt (2000) provide a detailed overview of the criticisms of the consumer society that have been reemerging at the end of the 20th century. According to them, inequality of income distribution; commodification of social life and everything becoming a marketed commodity with speed; and rapid globalization of the world economy, have set grounds for these criticisms.

These excessive consumption patterns and trends of the 20th century resulted in pollution and waste; environmental degradation; deterioration of economic well-being and the natural environment; global warming; rising poverty; inequality of income distribution between the rich and the poor people and the nations (Taylor and Tilford 2000). As a result, people started to address these problems and search for alternative approaches.

2.2 Alternative Approaches to Consumer Society

Anti-consumerist movements have emerged as a consequence of the criticisms of consumer society. One of these movements is "voluntary simplicity." Elgin (1993) described it as searching for meaning and simplicity in life; the development and enrichment of nonmaterial life; and having more time, less stress and more balance in life. Briefly, living more voluntarily is to live more intentionally, purposefully, and consciously. Living more simply is to unburden ourselves, to live more lightly, and to be direct and honest in all relationships (Elgin

1993, p. 397). He further indicated that the objective is not to live with less; it is living with balance to find purpose, fulfillment, and satisfaction in life.

Ecological living does not necessarily mean rejecting economic progress; instead it aims to discover technologies that are helpful toward a sustainable future (Elgin 1993). Today, people especially in Western industrial countries may want to slow down and have more time to enjoy life. They may be tired of keeping up with fashion trends. A simpler approach to living is associated with using time and energy saved by simpler living in activities with partner, children, and friends or in volunteering to help others; feeling concerned for the poor, social justice, and equity in the use of resources; lowering overall level of consumption; being less concerned with passing fads, fashions, and seasonal styles; changing consumption patterns in favor of durable, easy to repair, nonpolluting, energy-efficient, functional, and aesthetic products; eating more natural, healthy, and simple food; reducing clutter and complexity in personal lives by giving away or selling possessions that are seldom used; recycling; developing skills that enhance self-reliance and decrease dependence; being involved with compassionate causes; and changing transportation modes (Elgin 1993, p. 401- 403).

Another growing movement is the "culture jammers," who often support de-marketing or un-cooling of everything in consumer culture (Lasn 1999, p. 414). Similar to the voluntary simplicity lifestyles of Elgin, in 1990s de-marketing, which is a downshifting movement supporting an anti-consumerist lifestyle, has become a growing trend. As Schumacher mentioned in *Small is Beautiful*, "the point of life is to obtain the maximum of well-being with minimum of consumption." Lasn (1999, p. 426) believed that this philosophy can be applied in areas of the culture from food to fashion.

Bergman (2000) added a new dimension to these movements by focusing on work life and the underlying need for a new work movement. According to him, the purpose of our economy is to keep us in work, rather than pleasure, use, or satisfaction. We do not want economy to slow down because of our need for jobs. Therefore, buying many things can be seen as necessary rather than wasteful, in order to maintain economic growth. He believed that efforts to reduce consumption and waste or to save the environment will not succeed if they affect the job system

negatively. Consequently, environmental and labor movements first need to change the job system (Bergman 2000).

He explained that people can work for own consumption and provide for oneself such as planning vacations; servicing one's own bank account; working together with others in one place; small entrepreneurs using the internet to offer lower prices and to underbid the large companies, as they do not use stores and employees. As a consequence of these developments, the waste created by mass production will decrease since there will not be much excess (Bergman 2000).

Bergman (2000) further argued that when people do the work that they really want to do and which is best appropriate for them, work becomes empowering and people will lose interest in high consumption life styles. People who serve in the job system often feel frustrated and dissatisfied. This rage felt about work often leads to buying sprees. On the contrary, when people love what they do passionately they become indifferent to materialistic things and buy less. Moreover, they acquire a taste for finer things and get more attached to the things they buy, as they are a part of the process. Therefore, according to Bergman (2000) the new work system can be the solution to the problem of forced growth.

Other anticonsumerist movements concentrate on ecological or environmental consequences of current consumption habits (i.e. Taylor and Tilford 2000). Environmental sensitivities have developed since the mid-1980s (Prothero et al. 2010). There has been an increased interest in ecological and sustainable living. Their main argument is that it is not possible to continue consuming natural and renewable resources at the current levels (Shor and Holt 2000).

Further criticisms indicate that the aspirational gap created with desires outrunning incomes leads to an erosion in quality of life, especially for middle class consumers (Shor and Holt 2000). Shor (1999) underlined the importance of quality of life rather than quantity of staff and argues that instead of emphasizing luxury, exclusivity, and distinction, we can support democratic and egalitarian consumption practices. Products are to be made with higher standards, taking into account the labor and environmental conditions, unlike the conditions of the sweatshops in the apparel and fashion industries. Similarly, a number of researchers argued that we need to promote less consumption oriented lifestyles to improve quality of life

(Prothero and Fitchett 2000), and consider the benefits and costs of consumption, thus challenging the highly consumption-orientated dominant social paradigm (Kilbourne et al. 1997).

Shor (1999) stated that these developments can only be possible with consumer movement and government policy. Similarly Elgin (1993) also argued that to be able to resolve the problems of the industrial era, there needs to be action at personal, national, and global levels. At the personal level, we need global awareness and simple ways of living. At the national level, we need to adopt new policies of energy, environment, education, and media. At the global level, we need partnerships among nations. People may face conflicts that can hinder sustainable consumption behavior. Therefore, a paradigm shift would require a transformation of the institutions and sacrifice of both consumers and producers (Kilbourne et al. 1997).

Some of the arguments and proposals of these movements are similar to the principles and values of sustainable fashion, which is addressed in the coming sections. However, first I discuss the historical perspective to fashion and clothing, as examining how fashion has evolved throughout the history helps to understand the dominant fast fashion system and emergence of a sustainable fashion market.

2.3 Historical Perspective to Fashion and Clothing

At the beginning of the twentieth century, Simmel ([1904] 1957) suggested that any given form of clothing, art, conduct, or opinion may become fashionable. However, historically and theoretically, fashion has referred particularly to clothing and personal adornment, which have been recognized as effective tools for constructing one's desired appearance (Davis 1992). Thus, for the context of this study, the scope of discussions is limited to fashion in clothing, and can be defined as "the process of social diffusion by which a new style of fashion clothing is adopted by some group(s) of consumers" (Solomon 2002, p.503).

In medieval societies clothing symbolized wealth as it used to be very expensive (Wilson [1985] 2003). Before industrialization, more than two-thirds of clothing was made at home by women. As making of clothing was so labor-intensive, it was scarce and simple. Most people wore the same clothes for many years and did not try to keep up with fluctuations in style. Even the ordinary items of clothing were passed from one generation to the next (Scott 2005).

At the end of the 18th century, two critical events changed the production and consumption of clothing items. First, democracy removed social hierarchy and class distinctions, so people were free to dress as they pleased. Second, the opening of the first factories in the 1810's and mass production put clothing items and accessories within anyone's reach (Scott 2005). By the 1940s, the production of attractive cheap clothing was increasing along with the development of modern factory methods. In the 2nd half of the 20th century, mass-produced, ready-to-wear clothing started to become available to everyone (Wilson [1985] 2003).

Consumption of textiles increased as a result of availability of wider variety of goods at low prices; having higher disposable incomes and fewer social restrictions (Scott 2005). Attitudes to clothing have changed as well. Clothing, which was once regarded as a higher-priced good that is made to last for a long time, to be mended and altered, and to be chosen carefully, has become a disposable item, with little attention being paid to its quality and craftsmanship (Cline 2012).

In the middle of the 1980s, view of fashion has changed, similar to the changes in criticisms to consumer society. It was acknowledged that fashion and shopping can actually provide pleasure to women. Wilson (1985), who presents a feminist perspective of fashion, is one of the scholars' who argued that fashion can be for pleasure. According to her, fashion is not one form of capitalist consumerism and it is not possible to escape the fashion system.

In 19th century, the only justification given for clothing was function and utility but Wilson (1985) claimed that dress is never primarily functional. Instead, fashion is an art form and a symbolic social system. Her arguments are similar to those of Baudrillard and Barthes in that fashion always has social meanings and aesthetic considerations. It makes the exploration of alternatives possible and it can provide pleasure or social position but what makes fashion valuable is its pointlessness (Wilson 1985, p.303).

Before discussing fast fashion market and its critiques, I give an overview of the fashion institution, explaining the fashion system; the construction of meaning within the fashion system; theories on fashion diffusion; and subfields, dominant logics, and actors of the fashion institution, which facilitate understanding of emergence of a new market within fashion industry.

2.3 Fashion Institution

As conceptualized by McCracken (1988a), the fashion system can be defined as consisting of all people and organizations involved in creating symbolic meanings and transferring these meanings to cultural goods. Along with advertising and consumption rituals, fashion system is one of the modes that are responsible for creation and movement of cultural meanings (McCracken 1986).

McCracken (1986) explains this transfer of meaning in *Culture and Consumption*. The simplest way of meaning transfer is where the fashion system takes new styles of clothing and associates them with established cultural categories and principles. In the second way of meaning transfer, the fashion system invents new cultural meanings, which is undertaken by opinion leaders who may be individuals of high standing, such as the social elite or celebrities, and who may shape or refine existing cultural meaning and become sources of meaning for individuals of lower classes (McCracken 1988a). The innovation of meaning, changes in style and attitude are actually induced by lower classes imitating these opinion leaders (Simmel [1904] 1957).

The third way of meaning transfer entails the fashion system to engage in the reform of cultural meanings. The innovative groups are often responsible for the meaning transfer. In the case of the fashion system, these agents are product designers and fashion journalists and social observers, who serve as gate keepers (McCracken 1986). The network of institutions is also required for a style's diffusion to be successful, as mass consumers do not accept every change (Atik and Firat 2013). The fashion system can also promote the reform of cultural meanings in a more radical way, as in the case of hippies, punks, gays, or even anti-fashion movements which can become fashionable themselves (McCracken 1988a). Diffusion of fashion enables the meaning transfer to spread to masses.

According to earlier theories, fashion was mainly a practice of the leisure class, who set the standards for conspicuous consumption (Veblen [1899] 1994). New consumer trends in fashion, which were set by the big couture houses, first appear at the top then they trickle down the hierarchy from the upper social classes to the lower ones (Simmel [1904] 1957). However, trickle-down theory of fashion began to have some criticisms when other means of fashion diffusion were observed,

such as trickle across, and trickle-up. Atik (2006) provides an overview of these alternative theories of fashion diffusion in her thesis study.

King (1963), with his horizontal flow concept and trickle-across theory, delivered a different perspective to the trickle-down diffusion of fashion. He argued that in mass production and mass communication environments fashion spreads simultaneously within each social class. Mass production makes new fashions available at all price levels, while mass communication rapidly disseminates information and influences new fashion offerings. Similarly, with his "collective selection theory" Blumer (1969) suggested that a variety of fashion trends emerges and competes at the same time, and the ones that succeed lead to a collective transformation in mass taste and habit (Atik 2006).

More recently, it was noted that certain individuals who stand out from the crowd and who have influence within their subculture can also initiate new fashion trends in order to differentiate themselves from others and to communicate their ideals. Designers, retailers, and consumers started to search for these cool trends on the street and the fashion trends, which were discovered on the street, trickled up (Gladwell 1997). Consequently, trickle-up diffusion, does not simply happen through upper social classes imitating different subcultures directly but through a complex institutional process, involving also the other actors of the fashion institution. Fashion no longer served only to articulate class distinctions; it has become a key principle of the modern marketing institution for expanding markets in all areas of modern life (Atik and Firat 2013). Consequently, it has become a tool to increase sales and deliver economic growth (Fletcher 2010).

Fashion also brings about contradictions and tensions. In *The Ideological Genesis of Needs*, Baudrillard (1969) states that, with its urge to innovate signs, its continuous production of meaning, and mystery of its cycle, fashion is one of the more inexplicable phenomena (Baudrillard 1969, p. 71). Wilson (1985) also discussed the contradictions and tensions that fashion brings about. On one hand fashion is oppressive as we have to care about dress and our appearance, but on the other hand, we love clothes and we find fashion pleasurable. Faurschou's (1987, p. 69) definition of fashion as "a cultural production that both limits and enriches

symbolic communication, constitute a site of freedom or restriction, submission or rebellion, eroticism or domination," reflects these contradictions.

Clothes are required by everyone but there are those who hate it, who are not bothered with their appearance and who see it as a burden; and those who are addicted to it, the fashion freaks and the fashion victims (Wilson 1985). Similarly, Atik and Firat's study (2013) reveals that consumers constituting the mass market are fragmented and fashion requires the presence of these different consumer categories and actors, which have different institutional roles.

2.3.1 Actors, Subfields, Logics, and Institutional Work

The organizational field of fashion includes various key actors: clothing marketers (designers, manufacturers, and retailers), models, media, fashion associations, design and fashion schools, celebrities as endorsers and lead users, fashion bloggers, and consumers (Bourdieu 1993; Scaraboto and Fischer 2013; Dolbec and Fischer 2015). The fashion industry is composed of relationships between these different actors.

The fashion industry is also dominated by relationships between several subfields with varying power dependencies, which are subfields of haute couture and mass fashion (Bourdieu 1993). These subfields can be partly characterized by their relation to the two traditional underlying logics of the field, which are the logic of art and the logic of commerce (Scaraboto and Fischer 2013; Dolbec and Fischer 2015).

Logic of art, which is mostly concerned with creating innovative and influential trends, is dominant in subfields concerned with small-scale, labor-intensive production of artistic products such as haute couture. Whereas logic of commerce, focusing mostly on economic considerations, becomes more important in subfields that concentrate on mass production of commercial, cultural goods, such as mass fashion (Scaraboto and Fischer 2013). These traditional subfields influence one another (Rocamora 2002).

The subfields and their related dominant logics can intersect, for instance when haute couture designers develop ready-to-wear lines. These logics can also clash, for example when artistic freedom or creativity of designers is restricted by commercial success and institutional constraints. Prior research has stressed the replacement of old logics by new ones. More recently, Dolbec and Fischer (2015)

showed that new logics co-exist with prior logics in an organizational field. Institutional logics inform institutional work but not completely determine it. In the field of fashion, institutional work consists of designing, manufacturing, publicizing, and selling fashion products (Scaraboto and Fischer 2013; Dolbec and Fischer 2015).

These key actors, dominant logics, subfields, and institutional work have an imperative part in institutionalization of a sustainable fashion market. However, before I discuss this process, it is important to understand the current fast fashion system, its consequences, and critiques.

2.4 Overview of Fast Fashion: Critiques and Consequences

The phrase "fast fashion" refers to low-cost clothing collections that imitate current luxury fashion trends (Joy et al. 2012, p. 273). It is commonly used to describe how designs are adapted very quickly from catwalk to stores and into the mass-retailing market (Cline 2012). As Wilson states, "fashion is dress in which the key feature is rapid and continual changing of styles. Fashion, in a sense is change" ([1985] 2003, p. 3). This demand for fast speed in fashion is the main characteristic of today's textile and clothing industry.

Fast fashion, pioneered by the Inditex Group and H&M, has become popular among retailers that adopt the vertically integrated business model following "just-in-time" manufacturing philosophy and "quick response" strategies (Birtwistle et al. 2003). It was made possible by advanced technology, quick manufacturing, supply chain control, rapid prototyping, small batches, large variety, efficient transportation and delivery, and "floor ready" merchandise (Barnes and Lea-Greenwood 2006).

Previously apparel designers presented only two collections a year, spring/summer and autumn/winter. Standard turnaround time from catwalk to consumer was around six months. Now the rate of fashion production cycle is reduced to three to eight weeks and in-store collections change every 2 or 3 weeks, which can mean offering around 20 collections per year (Tokatli 2008; LeBlanc 2012). In order to keep customers coming back, the retailers replenish stock and purchase on a weekly basis to be able to introduce new trends and new items (Tokatli and Kizilgun 2009). For instance, retailers like H&M and Forever 21, receive daily shipments of new styles and Zara has new lines twice a week (Cline 2012).The

increasing supply and demand for fast fashion has created a vicious cycle necessitating designers, retailers, and manufacturers to react faster.

Speed of availability of updated looks, greater variety, and limited editions make the industry attractive to many consumers (Joy et al. 2012). Offering the latest fashion trends at reasonable prices makes fashion accessible for almost all social classes. Along with speed and style, disposability becomes an important characteristic as well. Fast fashion companies give ten washes as a reference after which an item is not expected to retain its original value (Joy et al. 2012). Consequently, the current fashion system requires products to be renewed frequently, so that the market constantly grows (Atik and Firat 2013).

High speed in fashion by itself may not describe unethical and/or environmentally damaging practices. It is rather a tool to increase sales and deliver economic growth. However, fast fashion is not only about speed of production but also about the greed of both buyers and sellers (Fletcher 2010). As Fletcher (2007) stated, "fast fashion is about greed and it's time to slow down and consider the true cost of choosing quantity over quality." While being affordable and trend-sensitive for consumers, and profitable especially for large retailers, the current fashion system raises fundamental ethical issues (Joy et al. 2012).

There are negative economic, societal, and environmental consequences of permanent and ubiquitous fashion consumption (Biehl-Missal 2013). The fashion industry, especially clothing production and consumption, has been criticized for the exploitation of both consumers and workers, damaging the ecosystem and the environment, contributing to depletion of natural resources, and increasing textile waste (Wilson 1985; McRobbie 1997; Morgan and Birtwistle 2009).

Dardis (1974) and Fiske (1989) are among the earliest scholars who started to discuss the impact of fashion apparel on consumer welfare. Fashion industry has been criticized for creating artificial newness and obsolescence. "Ideology of progress" can be responsible for the initiation of this desire for new, especially in Western societies that value change and progress (Fiske 1989, p. 327). Even if desire for newness is against consumers' interest, they continue to want the new. Women, with nonprogressive, nonachieving, routine, or repetitive jobs, may participate in fashion in order to participate in ideology of progress (Fiske 1989). Therefore,

fashion was criticized for almost making it obligatory for women to buy new things by constantly providing new offerings.

Later, the focus of criticisms shifted to fashion images and representation of women in advertising, which presented idealized female beauty that is unattainable for most women. Through its models, advertising, and thin-oriented clothing design, the fashion industry has caused social problems, such as reduced self-esteem, eating disorders, body image distortions, and increased tendency for cosmetic surgery (i.e. Wolf 1991; Bordo 1993). There have been strong criticisms of fashion and advertising imagery for inducing the beauty myth as most women do not fit the ideal beauty images reinforced by fashion institutions. These idealized images used in media produce an image of life that is colorful and exciting, perpetuating the desire for change (McCracken 1988a). Consequently, consumption becomes a source of false promises (Murray 2002).

Similarly, many youth subcultures have a strong desire for up-to-date tastes, in areas such as dress and music, both to intensify pleasure, and to feel in control. The basis of limitless exploitation is formed by the desire for attention-seeking through dress, and the social pressure to be seen as trendy (Böhme 2003; Cline 2012). Fast fashion retailers exploit and fulfill this desire by constantly providing new offerings, by rapid change, and by enabling immediate gratification of continually evolving temporary identities (Joy et al. 2012). The unsustainable conditions of production and their social and ecological consequences are often overshadowed by advertising and "must have" styles of the fashion industry (Cline 2012), creating the desire to buy new clothes (Niinimäki 2010). These criticisms highlight an ethical concern about fashion as an institution working not necessarily for the well-being of consumers, but instead perpetual recreation of insatiable desires for the system's own economic well-being (Wolf 1991; Bordo 1993).

The exploitation and economic unsustainability of mass production is disapproved on the production side as well (Cline 2012). In this regard, McRobbie (1997) was one of the first scholars to present an overview of the feminist view and criticisms of fashion. In 1970s, feminists address the exploitation of garment workers in clothing production and the fashion industry has been criticized due to appalling working conditions in clothing production, particularly for low wages and child labor

(Wilson 1985; McRobbie 1997). While large companies generate higher profits, workers only earn minimum wages (Cline 2012). Moreover, due to short lead times, suppliers struggle to plan orders and predict the number of workers needed in longer term. This creates the need for either temporary or subcontracted workers or excessive overtime to meet unpredictable orders with unreasonable deadlines (Fletcher 2007; Cataldi et al. 2010).

The return of the sweatshop is often a result of globalization and import competition. Anonymous chains of producers are now producing for the industry and for well-known designers to ensure that the orders will be on time and at the required cost. The privatized and non-unionized work is carried out and basic human rights are sometimes violated in production of the garments (McRobbie 1997). The numerous sweatshop scandals since 1990s are a sign of these appalling and unsafe working conditions. Therefore, it is important to consider the negative consequences of the rag trade and global sweatshops in the fashion industry (Schor 1999).

Fashion has also been related to waste in production and consumption (Dardis 1974; Pears 2006; Fletcher 2008; Morgan and Birtwistle 2009). Dardis (1974), was the first scholar to highlight that if fashion apparel is discarded before it is worn out, it represents an economic loss and an unnecessary waste of resources, unless there is a second-hand market. Mass-market fashion retailers today create and waste trends ever more quickly. Increasingly rapid releases encourage constant shopping and trend chasing (Cline 2012). Producers offering latest fashion trends at reasonable prices encourage disposability, which leads to rapid product turnover and high waste outputs (Fletcher 2008). As a result of the rapid and continual changing of styles, clothes quickly lose their appeal, become out-of-fashion and are disposed of. Consequently, this throw-away fashion has become a big waste (Morgan and Birtwistle 2009).

Furthermore, fast fashion emphasizes fashionable appearance at the expense of quality garments (Cline 2012). Traditionally, clothing items were higher-priced and made to last for longer. Competition based on low prices has led to production of lower quality clothes. The current cheap fashion clothing does not survive many washes and is seen as disposable. Therefore, consumers no longer have a personal and long-lasting interaction with their clothes and have little regard for the

craftsmanship of the product (Cline 2012). Through excessive consumption and quick disposal of clothes, these consumers in a way serve the global capitalist system (Biehl-Missal 2013).

Producing massive amounts of low-quality clothing with artificial fibers also puts strain on natural resources (Cline 2012). As the clothes we make, buy, wear, and discard are resource intensive, each stage of the garment's life has considerable environmental impacts (Goodwin 2012). Therefore, fast-fashion clothing production leads to deterioration of natural resources and the environment (Wilson 1985; McRobbie 1997).

Carbon and energy footprint analysis and life cycle assessment are important in order to assess the environmental effects of the entire value chain in fashion industry, from raw material supply to production, distribution, consumer use and disposal (Fletcher and Grose 2012). The carbon footprint of a garment consists of the total carbon dioxide and other greenhouse gases emitted in the lifecycle of a garment. The carbon footprint of a large unisex cotton t-shirt for instance, is 6.5 kilos (Carbon Trust 2008). This value can be reduced by switching to organic farming methods and by using green renewable energy. However, due to the volatile and unpredictable nature of the business, accurate carbon calculation for fast fashion items is a challenge for measuring sustainability (Fletcher and Grose 2012).

Most of the consumers are not aware that the clothes they make, buy, wear and discard are resource intensive, as they don't see the carbon or water footprints (Goodwin 2012). However, if fashion consumption keeps increasing at the current rate as a result of accelerated product obsolescence, the impacts on social and ecological environment will pose a threat to quality of life of future generations. Therefore, according to some researchers current unsustainable fashion practice needs to be re-designed (Fletcher 2007; Clark 2008; Cataldi et al. 2010).

2.5 Fashion and Sustainability

Over the last thirty years, there has been growing awareness of the impact of fashion consumption on both people and the environment (Beard 2008). There are now consumers who are resentful and disappointed with mindless consumption and its impact on society (Kozinets and Handleman 2004). They have become aware that consumption fosters production, creating an ongoing cycle of insatiable desire.

Different fashion styles created by fast fashion enable individuals to reinvent themselves to build multiple evolving selves, which help them to adapt to a postmodern lifestyle (Joy et al. 2012). However, recently they have become aware that this mindless consuming can also harm others and the environment. Therefore, these concerned consumers are now motivated to support sustainable fashion practices (Beard 2008).

McRobbie (1997) presented a relatively optimistic view of fashion and argued that it is a mistake to view fashion sector as unmanageable, as there are always opportunities for change. According to her, the new perspective of fashion needs to bridge the gap between six main stages of fashion cycle: education and training; design; production; retailing and distribution; advertising and the image industry; and consumption. In this regard, she proposed a new relational economic model based on a neighborhood system linking fashion designers, local customers, and well paid workers. However, establishing such a system may not be easy, as consumers can always prefer the cheapest stores despite their suppliers and production techniques. Therefore, exploring the social relations between producers and consumers and collaboration among all the actors involved is necessary.

McRobbie (1997) also offered some guidelines for this system to succeed. Education and training of both designers and workers can have an effective role in improving the performance of the fashion industry. Talented and trained fashion designers can work with small teams of well-paid and trained production workers to create an honest system that could survive global competition. Working in partnership with big fashion retailers might be necessary. Government can also play a role to help create a sustainable fashion industry by providing funding for such developments. The new system can enable consumer and producer sovereignty as well as a decent standard of living (McRobbie 1997).

The alternative system that McRobbie suggested at the end of 1990s has similarities to sustainable fashion philosophy, which is discussed in the next section. However, first I provide an overview of the more recent empirical studies on fashion and sustainability. Table 1 includes examples of these recent studies on sustainable fashion approaches.

TABLE 1: Recent Studies on Sustainable Fashion Approaches

Recent Studies on Sustainable Fashion Approaches	
Pears (2006) (Empirical)	Pears explores wasteful fashion consumption, to raise awareness of fashion waste and to develop a sustainable consumption practice that reduces fashion waste. Findings reveal that fashion consumption causes environmental problems and consumers are dissatisfied with the range of fashion garments available, homogenization of design, and low quality of products. She also argues that it is possible to develop a sustainability movement by adopting a community-oriented approach and through encouraging frugality, simplicity, and waste conservation.
Fletcher (2007) (Conceptual)	Fletcher addresses the unpleasant reality of fast fashion and necessity to slow down and consider the true cost of choosing quantity over quality.
Beard (2008) (Conceptual)	Beard examines the factors influencing the rise of ethical fashion and the lifestyle and societal indicators that effect consumer behavior in relation to purchasing eco-fashion products.
Brito et al. (2008) (Empirical)	They discuss how the sustainability movement is impacting the fashion retail supply chain and the challenges and conflicts that the stakeholders face.
Clark (2008) (Conceptual)	Clark argues that the slow approach offers more sustainable and ethical ways of being fashionable and has implications on design, production, consumption, and use. It is more than a literal opposite of fast fashion.
Fletcher (2008) (Conceptual)	Fletcher examines how sustainability can transform the fashion system and the innovators of change. The study covers transforming fashion products, fashion systems, and the fashion design practice.
Winge (2008) (Conceptual)	Winge examines deeper meanings and implications beneath fashionable eco-conscious dress worn by celebrities and questions if green or eco-fashion is only a trend or the fashion industry is actually adopting an environmental approach to fashion.
Morgan and Birtwistle (2009) (Empirical)	They address the relationship between fast fashion and increase in textile waste.
Cataldi et al. (2010)	They assess the slow fashion movement using systems thinking, the 5 level Framework for Strategic Sustainable Development (System,

(Empirical)	Success, Strategic Guidelines, Actions, Tools), and the four Sustainability Principles. They examine potential barriers and gaps; argue that the current unsustainable fashion practice needs to be re-designed; and provide "Slow Fashion Values" for Slow Fashion to emerge as a sustainable fashion model.
Fletcher (2010) (Conceptual)	Fletcher frames the ideas and practices of the slow culture to engage better with systems-level questions in the fashion sector and to build deeper and longer-lasting change towards sustainability.
Niinimäki (2010) (Empirical)	Niinimäki addresses the attitude-behavior gap in ethical clothing consumption. According to the findings, manufacturers, designers and retailers are not truly aware of what consumers expect from eco-fashion, and therefore, the current eco-fashion and ethical clothing appeal only to a limited number of consumers.
Hadden (2012) (Conceptual)	Hadden provides examples of practices, companies, and designers who support the slow fashion movement.
Joy et al. (2012) (Empirical)	They address the dissonance among fast fashion consumers, who often share a concern for environmental issues and indulge in consumer patterns against ecological best practices. They argue that actual luxury brands can unite the ideals of fashion with those of environmental sustainability by emphasizing authenticity, respecting artisans and the environment, and fostering values of quality and sustainability.

In her thesis study carried out in Australia, Pears (2006) seeks to identify how social significance of fashion can be preserved within the context of sustainable consumption development. She explored wasteful fashion consumption aiming to raise awareness of fashion waste, to stimulate individuals to take action, and to develop a sustainable consumption practice that reduces fashion waste.

In 2008, Winge questioned whether "green" or "eco-fashion" is only a trend, or if the fashion industry is actually adopting an environmental approach, by examining the deeper meanings and implications attached to the fashionable eco-conscious dress worn by celebrities. Same year, Beard (2008) in her article, "The Branding of Ethical Fashion and the Consumer: A Luxury Niche or Mass-market Reality?" examined the factors influencing the rise of ethical fashion and investigated

the lifestyle and societal indicators that effect consumer behavior in purchasing eco-fashion.

In her article, "Slow Fashion: an Oxymoron or a Promise for the Future," Clark (2008) gave a theoretical explanation of how slow fashion can offer more sustainable and ethical ways of approaching fashion, which has implications on design, production, consumption, and use of clothes. Same year, in a study focusing on the stakeholders of the fashion industry, Brito and colleagues (2008) discussed how the sustainability movement is impacting the fashion retail supply chain and the challenges and the conflicts that the stakeholders face.

To understand eco-fashion consumption, Niinimäki (2010) addressed the attitude-behavior gap in ethical clothing consumption. Despite ethical interests, the increase in the amount of cheap and fashionable clothing leads to unsustainable clothing consumption, which according to her explains the existing attitude-behavior gap in the eco-fashion field.

Cataldi, Dickson and Grover (2010), in their master thesis study, assessed the slow fashion movement using systems thinking, the 5 level Framework for Strategic Sustainable Development (System, Success, Strategic Guidelines, Actions, Tools), and the four Sustainability Principles. They examined the potential barriers and gaps preventing the success of each Leverage Point. Their findings aim to strengthen the slow fashion movement by providing guidance to various actors in the field of fashion including designers, suppliers, buyers, manufacturers, retailers, and co-producers.

Most of these prior studies on sustainable approaches to fashion are either conceptual (i.e. Beard 2008; Clark 2008; Winge 2008) or mainly carried out with consumers (i.e. Pears 2006; Niinimäki 2010; Joy et. al. 2012). However, they show that there is a growing awareness on the consequences of fast fashion. Discussion of criticisms of consumer society and the fast fashion system and the growing interest on fashion and sustainability help us to understand the emergence of a sustainable fashion market. The next section provides an overview of the turning points, developments, and milestones of sustainable fashion.

2.5.1 Sustainable Fashion: Developments and Mile Stones

Sustainable fashion and the concepts of recycling and environmentally friendly fabrics began to grow in the early nineties, attracting media's attention to this topic. Numerous sweatshop scandals that happened in the late 1990s pressured fashion brands and retailers to implement factory compliance monitoring programs either independently or through collaborative initiatives, such as the Fair Labor Association (LeBlanc 2012).

In March 1990, *New York Times* and *Vogue* published articles about the new environmental trend in the fashion world. *The World of Fashion in Vogue* provided an overview of the turning points of eco fashion in *Voguepedia*. In this section, I include some of these milestones. In summer 1990, the British fashion designer Katharine Hamnett, who is often recognized as one of the first designers to combine environmental activism with fashion, gave a speech at the United Nations about the environmental impacts of fashion. In 1995, Giorgio Armani began to use hemp in his Emporio Armani collection. In 2001, Natalie Chanin launched *Project Alabama* and her collection of 200 locally produced hand-sewn T-shirts were well received at New York Fashion Week. Same year, Stella McCartney launched her own line, applying animal-friendly (no leather, no fur) policies.

The first Ethical Fashion Show was held in Paris, in 2004. Same year, a slow fashion show was also staged in London. In April 2006, Vanity Fair had its first environmentally focused issue, where the editor Graydon Carter declared "Green is the New Black." In this issue, eco fashion was featured as the latest celebrity chic. Consequently, fashion designers, such as Giorgio Armani, Stella McCartney, and Betsey Johnson started creating stylish garments made with sustainable materials for the runways, boutiques, mass markets, and especially for celebrities (Winge 2008). In 2007, all 20,000 cream-and-brown shopping bags of designer Anya Hindmarch, with the slogan "I'm Not a Plastic Bag," were sold out within an hour in London. Sustainable fabrics were widely seen in New York Fashion Week held in 2010. The same year the first official sustainable fashion show was staged at London Fashion Week (Eco Fashion, *Voguepedia*).

Even though sustainable approaches to fashion are still not widespread, the number of sustainable fashion companies and designers are increasing (Pears 2006).

Hadden (2012) provides examples of companies and designers who support the sustainable fashion movement. Along with these, many other examples of sustainable fashion companies, brands, designers, and practices are presented in the findings chapter. In this section, I only include some of the examples, which show the development of the movement.

Sustainable design in fashion initially focused on selection of materials. However, sustainable fashion requires a more holistic perspective. Therefore, recently companies are taking into account not only how fashion is produced, but also how it is consumed (LeBlanc 2012). Clark (2008) gives examples of companies that try to slow down the obsolescence in fashion, such as Slow and Steady Wins the Race, Junky Styling, and TRAIID (Textile Recycling for Aid and International Development). Some of these companies take part in Fashion Weeks and have celebrity clients such as Gwen Stefani and Kate Moss, which enhances the fashionability of the garments.

Apart from individual companies and designers, there are also institutions and coalitions which are important in the development of the movement. For instance, Centre for Sustainable Fashion, launched by London College of Fashion, conducted an online survey in 2007 to assess fashion companies' understanding of sustainability issues and how these factors differ across the various fashion sectors including retail, design, wholesale, or manufacture. Fashion and Sustainability Analysis report the Centre issued in 2008, highlights opportunities and industry's need for a networked and focused approach to sustainable activity in the fashion industry.

Another example is WRAP (Waste & Resources Action Program), which was established in 2000 in UK, as an independent not-for-profit company to help reduce waste, minimize resource use, and increase recycling. In July 2012, the organization launched a report titled "Valuing our Clothes," which provides an overview of the financial and environmental impacts of clothing -from raw material, through manufacturing, to purchase, use and disposal- and encourages a reevaluation of the way we view and value our clothes. Liz Goodwin, the CEO of WRAP, addressed that at each stage of the garment's life, there are considerable environmental impacts and therefore, there is a potential to identify and implement changes that will reduce these impacts (Goodwin 2012). She argued that it is possible for consumers to realize

both financial and environmental savings if they could increase the life of the clothes they buy and wear, through alteration, repair, multiple re-use, and recycling. At the same time, there are significant opportunities for businesses to develop new offerings and to grow.

Findings of WRAP's research shows that if we increase the use of our clothes by nine extra months, we can reduce their water, carbon, and waste impacts by up to 30 percent, and save £5 billion pounds. Their findings also reveal that one third of the clothing we no longer want ends up in landfills each year. This shows that 140 million pounds is currently lost to the economy in a year, since these textiles can instead be processed for re-use in multiple ways in a range of industries, from mining to motoring (Goodwin 2012).

Furthermore, major brands and nonprofit organizations came together to form the Sustainable Apparel Coalition in 2011. The Coalition, consisting of retailers (i.e. Target), direct apparel manufacturers (i.e. Nike and Levi's), NGOs, and government agencies, launched a sustainability tool called the Higg Index in July 2012 (*Forbes* 2012). The index, which covers three main areas -brand, product, and facility- aims to enable the apparel industry to assess the sustainability of a product throughout the supply chain; reduce redundancy in measuring sustainability in the apparel industry; drive business value through reducing risk and uncovering efficiency; and create a common means to communicate sustainability to stakeholders. Ultimate aim of the coalition is to develop the index into a tool that can be integrated into design and manufacturing processes, to help assess the potential impacts of various decisions and to enable companies to design more sustainable products (*Forbes* 2012).

2.5.2 Slow Fashion as a Sustainable Fashion Movement

Slow fashion is one of the most recent movements of sustainable fashion. Therefore, I discuss it more thoroughly in a separate section. Slow fashion develops a more holistic understanding of what constitutes sustainable fashion by addressing social, economic, and environmental issues (Pears 2006). The "Slow Design Manifesto" presented at the "Slow Design" symposium in Milan in 2006, described the slow approach as offering the time to produce, appreciate, and cultivate quality. The term "slow fashion" was first coined by Kate Fletcher from Centre for Sustainable Fashion in England, in 2007. It borrows from the Slow Food Movement,

initiated by Carlo Petrini in Italy, in 1986 (Fletcher 2007). Slow Food movement has been encouraging people to enjoy regional produce and organically grown food, and defending agricultural biodiversity (Hadden 2012). It links pleasure and food with awareness and responsibility. Similarly, the new sustainable vision for fashion links pleasure and fashion with awareness and responsibility (Fletcher 2007).

Initially, slow clothing was intended to be an alternative to mass produced clothing but its meaning has been broadened. "Slow" in slow fashion does not refer to time, as in the case of "fast" in fast fashion. It represents a different approach in which designers, buyers, retailers, and consumers are more aware of the impacts of products on workers, communities, and ecosystems (Fletcher 2007). It is a different approach and a philosophy, which is about being mindful of the stakeholders' needs and designing, producing, consuming, and living better. Similarly, Clark (2008) presents slow approach as something more than a literal opposite of fast fashion. It is identifying sustainable fashion solutions by reformulating strategies of design, production, consumption, use, and reuse.

Apart from being concerned with garment industry's impact on environment and resources, it also aims to reduce the number of trends and seasons, and encourage quality production so that garments will have greater value as opposed to disposable fashion (Cataldi et al. 2010). As Fletcher (2008) addresses, if quality is favored over quantity and if people choose garments that last longer, the rate of clothing consumption will be slowing down. The broader definition of slow includes not only slowing down of consumption and production processes, but while doing so, also protecting the well-being of workers, communities, and the environment.

Slow fashion is about choice, information, cultural diversity, and identity. It is also about balance. As there is no time pressure, it allows suppliers to plan orders and predict the number of workers needed in longer term, giving companies time to build mutually beneficial relationships. Consequently, there is no need for temporary or subcontracted workers or excessive overtime to meet unpredictable orders with impossible deadlines. Consumers will eventually buy fewer products, but higher in value. Slow design enables a richer interaction and a stronger bond between designer and maker; maker and garment; garment and user. It includes the consumer in the supply chain as co-producer (Fletcher 2007; Cataldi et al. 2010).

As explained by Kate Fletcher at a convention organized by Centre for Sustainable Fashion in 2007, slow fashion is not only a fad or a seasonal trend, but a sustainable fashion movement that is gaining importance (Cataldi et al. 2010). It can provide a more sustainable future for the textile and clothing industries and an opportunity for the businesses to be done in a way that respects workers, environment, and consumers (Fletcher 2007; Cataldi et al. 2010). Consequently, slow culture is an opportunity to build deeper and longer-lasting change towards sustainability in the field of fashion (Fletcher 2010).

Three pillars of slow approach were introduced in "Slow Design" symposium in Milan, in 2006. In 2008, Clark used the same three groupings -taking a local approach; having transparent production systems; and making sustainable and sensorial products- to develop a conceptual framework. Researchers from the Strategic Leadership towards Sustainability program in Sweden suggested that in order for slow fashion to emerge as a sustainable fashion model, "Slow Fashion Principles" need to guide the entire supply chain, including designers, manufactures, and retailers (Cataldi et al. 2010). These principles are mostly covered within the three pillars of slow approach stated below.

The first approach is to take a local approach to designing and making fashionable clothes, which entails using local materials and resources to support the development of local businesses and skills. It aims to support local communities by offering skill development and helping them to trade (Cataldi et al. 2010). The utilization and valuing of local resources can potentially provide an alternative to standardization and centralization, and encourage diversity, as opposed to using homogeneous materials and resources all around the world (Slow + Design Manifesto 2006).

Consequently, slow fashion aims to maintain ecological, social, and cultural diversity. Biodiversity, which is to preserve and support the variety of life and of habitats on Earth, offers solutions to climate change and environmental degradation. Slow fashion also supports business and cultural diversity, encouraging diverse and innovative business models, such as independent designers, second-hand, vintage, recycling, fashion leasing, local knitting clubs, clothing swaps, and traditional methods of garment and textile making (Cataldi et al. 2010).

Transparent production systems with less intermediation between producers and consumers, is the second main approach to slow fashion (Clark 2008). Transparency refers to blending of the line between consumption and production, as seen in smaller scale enterprises and local practices, such as using of hand skills, revival of knitting, and other craft processes. More transparent production systems and less intermediation also enhance collaborations between designer, producer, and user, and acknowledge human needs through co-creation. Consequently, collaboration between producers and co-producers ensures long lasting relationships and enhances strength of the movement (Cataldi et al. 2010).

Third approach to slow fashion is sustainable and sensorial products, where the aim is to design and make garments that generate significant experiences, have a longer usable life, and are more highly valued than typical consumables (Clark 2008). The product is seen as an investment and remains "in fashion" beyond the fashion season. Thus, using high quality fabrics, encouraging classic design over passing trends, offering beautiful and timeless pieces to ensure the longevity of clothing has become important (Cataldi et al. 2010). These "slow products" are not purely based on visuality or image. They also include sensorial aspects and emotional factors that underlie the choices of what people wear (Clark 2008).

This approach also acknowledges the fashion system and cultural significance of shopping, and recognizes fashion as being dependent on actual objects, not only on their sign value (Clark 2008). In this respect, co-creation of garments, offering fashion with emotional significance, or including the customer in the design process in order to satisfy needs of creativity, identity, and participation becomes important (Cataldi et al. 2010).

Other important values and principles of slow fashion are encouraging a systems thinking approach as it recognizes the impact of collective choices and actions on the environment and people; slowing consumption to allow earth's natural regeneration; ensuring the fair treatment of workers; increasing visibility in the market to be competitive; developing awareness of consumers, designers, and producers; and being conscious of the needs of others and the environment (Cataldi et al. 2010).

Clark (2008) addresses that slow approach can be applied to fashion. In this regard she suggests repositioning the fashion system; challenging existing hierarchies of designer, producer, and consumer; questioning fashion being concerned exclusively with the new; confronting fashion's reliance on image; presenting fashion as a choice rather than a mandate; and supporting collaborative work at the local level. Consequently, slow fashion can offer an approach for a more sustainable future if redefinition of fashion acknowledges the slow principles and practices (Clark, 2008).

However, for slow fashion principles to become realizable efforts need to be made both on personal and societal levels. On personal level, we can oppose mass produced fashion; support smaller businesses, fair trade, and locally-made clothes; buy second-hand or vintage clothing; donate unwanted garments rather than throwing them away; choose clothing made with sustainable, ethically-made, or recycled fabrics; choose quality garments that will last longer and that can be repaired; make, mend, customize, and alter own clothing; slow the rate of fashion consumption by buying fewer clothes and less often. On a societal level, conscious consumption can be promoted; supply chain can be slowed down to reduce the number of trends and seasons; awareness can be raised about the negative impacts of the fashion industry on workers, communities, and ecosystems (Hadden 2012).

So far in the literature review chapter, I gave an overview of consumer society and fashion institution; and the conditions, consequences, and criticisms leading to emergence of a sustainable fashion market. I then explained sustainable fashion, including the slow fashion movement, by providing an overview of the developments and milestones. Final section of literature review includes earlier studies and key concepts on market formation and market dynamics, which are critical in developing the conceptual framework to examine new market formation.

2.6 Earlier Studies and Key Concepts on Market Dynamics

In this section, I review the earlier studies on market dynamics along with the key concepts used in this study. Many of these major concepts related to market-level analysis were introduced in prior studies on institutional theory and actor-network theory. The study of market system dynamics and actor-network theory help to understand the influence of multiple actors on dynamic behavior of markets as

social systems (Giesler 2003). Social systems in marketing address the socially constructed nature of marketing and hold that consumer culture is not given and marketing knowledge is constituted in the dynamic interaction of observer and observed. Giesler's (2003) research illustrates that social systems are fundamentally social entities, created both by consumers and by the marketers.

Similarly, according to actor-network theory (ANT), a market can be conceptualized as an actor-network, which is constantly emergent in the relations among actors and the translations (Martin and Schouten 2014). The core construct in actor-network theory is the actor-network, which is a heterogeneous assemblage of human, nonhuman, and hybrid actors. This assemblage is unstable and constantly being performed through the interactions among various actors (Callon 1986; Martin and Schouten 2014). ANT holds that action necessitates mobilization of these multiple human and non-human entities (Latour 2005).

The other key principle of ANT is that all actors have agency to affect the actions of other actors (Latour 2005; Martin and Schouten 2014). Any human or non-human entity can become an actor, as soon as it exerts a force on others (Bajde 2013). Translations is another key construct in ANT. Callon (1986) refers to translation as a process whereby one actor problematises a situation and then mobilizes an actor-network to deal with it. ANT treats everything as a continuously generated effect of the network of relations. For actors to exist and action to happen, translations performed by assemblages of human and nonhuman entities (materials, technologies) have to be enacted (Bajde 2013). Translations result from the relations among actors, and actors are constituted by those relations (Martin and Schouten 2014).

Bajde (2013) states that ANT explores uncertain human-nonhuman assemblages or groupings and what holds these assemblages together or apart; how they grow stronger or weaker; how they facilitate and shape action; and how they are ultimately made into actors. These key concepts and principles of ANT are helpful to explain the process of market emergence in the field of fashion. However, as an approach ANT is very general. Therefore, I use elements of actor-network theory in combination with Institutional Theory (Humphreys 2010) to conceptualize the study and to make it more theoretical and focused.

Based on Institutional Theory, a market can be defined as "an organizational field encompassing a set of institutions and actors, governed by institutional logics, supported by institutional work, and characterized by institutional boundaries (Dolbec and Fischer 2015, p. 1449). Legitimacy is one of the core concepts of Institutional Theory and it refers to the "extent to which an action or entity is characterized by cultural alignment, normative support, or consonance with relevant rules or laws" (Scott 1995, p. 45). Actors in the field of fashion have varying degrees of legitimacy. For instance, according to study of Scaraboto and Fischer (2013), plus-sized consumers are likely to have less legitimacy than other consumers. Similarly, at the moment sustainable fashion designers and companies have less legitimacy compared to fast fashion designers and brands.

Institutional logics define the content and meaning of institutions and are important in shaping the actions of the actors when operating within a field (Dolbec and Fischer 2015). There are two dominant logics in the field of fashion: the logic of art and the logic of commerce, as addressed previously in literature review (Scaraboto and Fischer 2013; Dolbec and Fischer 2015). Actors can behave in ways that do not conform to the dominant logics within a field, which may result in dominant logics to be reproduced, as in the recent study of Dolbec and Fischer (2015). Similarly, the current research seeks to expand, not reject the logics of the existing fashion market by introducing "logic of sustainability."

Institutional work is defined as "actions aimed at creating, maintaining or disrupting practices, understandings and rules shared by actors in an organization field" (Dolbec and Fischer 2015, p. 1450). Institutional work is shaped by institutional logics and it can help to maintain or reshape an established organizational field; or facilitate establishment of new fields and weakening of existing ones. In the field of fashion institutional work includes designing, manufacturing, publicizing and selling fashion products, as stated earlier in literature review (Scaraboto and Fischer 2013; Dolbec and Fischer 2015). These elements of Institutional Theory are used to understand the dynamics of new market formation within the field of fashion.

Models of market development are often based on the relative importance of firms versus consumers. As stated by Martin and Schouten (2014), firm-driven

market development (FDMD) and consumer-driven market emergence (CDME) have major differences. In CDME, the tasks, the costs, and the adoption of innovation are distributed, incremental, and occurs in communities of practice that provide support for the products and their usage. Whereas, according to Callon’s translation theory, in FDMD the firm is the primary actor, which tries to develop, lead, and manage an entire actor-network.

Success depends on the compliance of human actors (product designers, marketing managers, and customers); institutional actors (suppliers and distributors); technological actors (products); and macro-environmental actors (environmental, economic and/or sociopolitical conditions). For the purpose of this study, institutional actors do not only consist of suppliers and distributors but also include other actors taking part in the institutional side of fashion, such as designers, marketers, retailers, fashion associations, and fashion schools.

Research on market system dynamics has been increasing. Recent studies on market development often examined consumers’ role in market formation or in changing existing markets (i.e. Thompson and Coskuner-Balli 2007; Giesler 2008; Sandikci and Ger 2010; Scaraboto and Fischer (2013); Martin and Schouten 2014). Few studies focused on marketers as the initiators of marketplace dynamics (i.e. Humphreys 2010; Giesler 2012). Table 2 includes examples of some of these recent studies on market formation and change.

TABLE 2: Examples of Studies on Market Formation and Market Dynamics

Examples of Studies on Market Formation and Market Dynamics	
Thompson and Coskuner-Balli (2007)	They analyze community-supported agriculture (CSA) as a form of ethical production and consumption organized as resistance to commercialization of organic agriculture by industrial farms. They examine consumers’ roles in changing existing markets, focusing on those who are motivated to participate in change efforts to challenge the market. Consumers can collaborate with entrepreneurial actors to resist hegemonic control of mainstream marketers.
Giesler (2008)	In his analysis of music downloading and sharing, Giesler describes

	<p>market evolution as a conflict between opposing groups of consumers and producers, where activist consumers force the industry to counter and adapt. He examines consumers' roles in changing existing markets, focusing on those who are motivated to participate in change efforts to challenge the market and to countervail the hegemonic control of mainstream marketers. Consumers may have limited success if their efforts provoke powerful marketers to attempt to de-legitimate their actions.</p>
Sandikci and Ger (2010)	<p>They examine changes in existing markets and use fashion innovation to resist stigmatization as a result of existing market offerings. Consumer innovators who develop a parallel taste structure initiate a business opportunity which becomes a new market or a new market segment. They focus on efforts of motivated agents who participate in change efforts because they have unmet needs. Consumers can collaborate with entrepreneurial actors to support a parallel taste structure within a market.</p>
Humphreys (2010)	<p>Humphreys studies what leads to the creation of new markets by focusing on marketers as the main agents of marketplace dynamics, who are motivated to participate in change efforts. She draws from institutional theory to provide an understanding of market creation and development, viewing it as a process of legitimization.</p>
Giesler (2012)	<p>Giesler makes use of Callon's theory of translation in his analysis of the Botox market. He studies what leads to the creation of new markets focusing on marketers as the main agents of marketplace dynamics, who are motivated to participate in change efforts.</p>
Scaraboto and Fischer (2013)	<p>They study "frustrated fatshionistas" who seek to expand, not reject the logics of an existing market in order to fulfill their desires to wear designer clothing. They focus on efforts of consumers as motivated agents who participate in change efforts in existing markets because they have unmet needs. Consumers may have limited success, especially if they are marginalized within the society.</p>
Martin and Schouten (2014)	<p>They use ANT to examine an emerging market within the motorcycle industry and role of relations and translations that led to its formation and stabilization. They highlight consumers' roles in driving market emergence and develop a model of consumption-driven market</p>

	emergence in harmony with existing market offerings. They focus on efforts of consumers as motivated agents who participate in change efforts because they have unmet needs. They develop products, practices, and infrastructures that exist separately but mirror the mainstream.
Dolbec and Fischer (2015)	They examine consumers' roles in market systems and unintended market level changes by engaged consumers leading to augmentation of institutional logics in an aestheticized field. They focus on institutional work, actors, and institutional logics and show that new logics co-exist with prior logics in an organizational field.

Some of these earlier approaches to Market System Dynamics emphasize one actor-network and how it mobilizes. Most examined either consumers' or marketer's role in market formation and market change (See Table 2). However, new markets can emerge through the collaborative efforts of consumer evangelists and entrepreneurial actors (Thompson and Coskuner-Balli 2007). Therefore, in analyzing the market system different actors of the fashion cycle are included in the study.

Similarly, Humphreys (2010), in her article "Megamarketing: The Creation of Markets as a Social Process," drew from institutional theory to provide a theoretical understanding of market creation and development over time. She stated that there are at least two ways to approach how new markets are created. The first one is the conventional approach, where consumers have real needs to be fulfilled and for this markets are created. The second approach is the MSD approach, where actors need to work together as a system to create a market. Humphreys (2010) theorize the creation of new markets as a cultural, political, and social process, acknowledging the importance of different stakeholders.

Furthermore, in most of the earlier studies, consumers' role is conceptualized as some form of resistance to prevailing market logics (i.e. Thompson and Coskuner-Balli 2007; Giesler 2008). According to Martin and Schouten (2014), these resistance-based market formations are examples of one-sided market dynamics. When consumers refuse to contribute to profits of mainstream marketers, which Scaraboto and Fischer (2013) define as large, high-profile corporations with strong brand names, they want to be served by alternative marketers. However, resistance to

or struggle against existing market logics is not a prerequisite for new market formation (Martin and Schouten 2014). Similarly, rather than taking an activist bent, this study examines the process of market emergence in the field of fashion.

In contrast to studies of resistance, Scaraboto and Fischer (2013) study "frustrated fatshionistas" who seek to expand, not reject the logics of an existing market in order to fulfill their desires to wear designer clothing. Similarly, Martin and Schouten (2014) demonstrate that there is another side to market dynamics in which consumers, similar to successful institutional entrepreneurs, not only seek to expand existing industry logics but also drive the formation of a new market within an existing industry. They worked to develop products, practices, and infrastructures that existed separately but mirrored the mainstream (Martin and Schouten 2014).

Martin and Schouten's (2014) study of emergence of a new market within the motorcycle industry, develops a model of consumption-driven market emergence in harmony with existing market offerings. It is a process of multiple translations. Consumers mobilize human and nonhuman actors to co-constitute products (adult minimoto rider), practices, and infrastructures. These drive the growth of interlinked communities of practice (magazine and a race event), which are translated into a fully functioning market.

Recently, Dolbec and Fischer (2015) show unintended market level changes by engaged consumers lead to augmentation of institutional logics in the field of fashion. In prior research, the focus of market level dynamics has largely been on products types (i.e. mini-moto bikes), producers (i.e. community supported agriculture entrepreneurs) or brands (i.e. Botox). Dolbec and Fischer (2015) expands the scope of market level dynamics by focusing on institutional work, actors, and institutional logics.

Similar to Scaraboto and Fischer (2013), Martin and Schouten (2014), and Dolbec and Fischer (2015)'s studies, this research seeks to expand, not reject the logics of an existing market. However, unlike these studies it focuses on market emergence driven by institutional actors, not consumers. In the next chapter, I provide an overview of the literature gaps; state the research questions the study responds to; and discuss the conceptual framework used to understand the dynamics of new market formation within the field of fashion.

3. CONCEPTUAL FRAMEWORK

In recent years, empirical studies on fashion and sustainability have gained importance. In literature review, I provide an overview of the prior studies on fashion and sustainability, which helps to frame the literature gap (See table 1). Even though some of these earlier studies have an optimistic view on future of fashion and argue that it is possible to design a more sustainable fashion system (i.e. McRobbie 1997; Clark 2008; Fletcher 2008; Cataldi et al. 2010), there are many barriers to creation of a sustainable fashion market, which are addressed in the findings section. Therefore, it is not easy to label sustainable fashion as an oxymoron or to trust it to be the future of fashion system. The aim of this thesis study is not to explore whether sustainable fashion actor-network will mobilize. The purpose is to provide a more comprehensive perspective of market formation.

Furthermore, most of the prior studies on sustainable approaches to fashion examined the consumer-side and were micro-oriented (i.e. Pears 2006; Niinimäki 2010; Joy et al. 2012). This study aims to provide a more macro perspective of market formation. I benefit from institutional theory, market system dynamics, and actor-network theory to give a theoretical explanation of how new markets emerge within the field of fashion and how different actors, institutional work, and institutional logics contribute to this market change. The key concepts and principles of ANT are helpful to explain the process of market emergence in the field of fashion. However, as an approach ANT is very general. Therefore, I use elements of actor-network theory in combination with institutional theory to conceptualize the study and to make it more theoretical and focused.

In literature review, I also provide an overview of the prior studies on market dynamics, which further helps to frame the literature gap (See table 2). Recent studies on market development often examined consumers' role in market formation or market change (i.e. Thompson and Coskuner-Balli 2007; Giesler 2008; Sandikci

and Ger 2010; Scaraboto and Fischer (2013); Martin and Schouten 2014). Few studies focused on marketers as the initiators of marketplace dynamics (i.e. Humphreys 2010; Giesler 2012). However, new markets can emerge through the collaborative efforts of different actors. Therefore, in analyzing the market system different actors of the fashion cycle are included in the study.

Furthermore, in some of the earlier studies, consumers resist prevailing market logics (i.e. Thompson and Coskuner-Balli 2007; Giesler 2008). Similar to recent studies of Scaraboto and Fischer (2013), Martin and Schouten (2014), and Dolbec and Fischer (2015), this research seeks to expand, not reject the logics of an existing market by introducing the "logic of sustainability." However, unlike these studies it focuses on market emergence driven by institutional actors, not consumers.

The review of earlier literature, research, and the key concepts, and addressing the literature gaps help to frame the research questions and the conceptual model. The study aims to respond to following research questions.

1. What are the dynamics that mobilize actors to seek market change?
2. What are the initiators of change and their roles in formation of a new market in the field of fashion?
3. What are the barriers and driving factors in emergence of a sustainable fashion market?

Figure 1 shows the process of market emergence in the field of fashion. The conceptual model suggests that the creation of a sustainable fashion market is driven by philosophical concerns and influenced by social, cultural, economic, and environmental happenings. Consequences of fast fashion lead to criticisms and conflicts within existing fast fashion actor-network. Actors are motivated by criticisms and consequences of fast fashion leading to legitimization of a new actor-network, creating a new sustainable fashion market. The sections of the model which are marked in blue are responded by review of existing literature. The sections highlighted in red are the contributions of this dissertation.

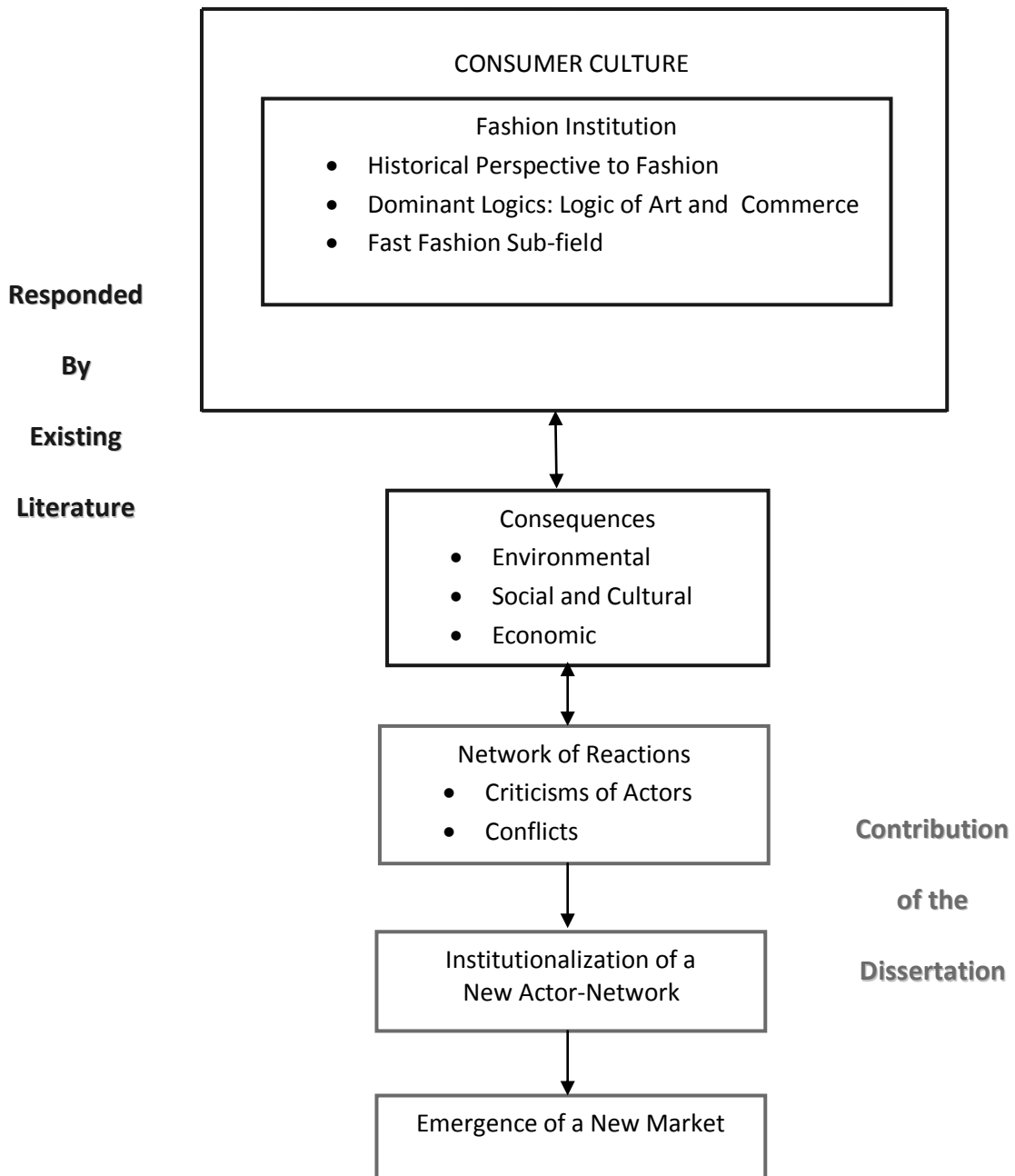


FIGURE 1: Process of Market Emergence

The next section on methodology explains the research context and the data collection and analysis methods used in examining the emergence of a new market within the field of fashion.

4. METHODOLOGY

The methodology section includes the research context and data collection methods used in the study, including ethnographic research consisting of participant observation and interviews, supported by secondary data. I also discuss my position as the participant observer. The chapter concludes by data analysis and methods used to assess trustworthiness of the findings.

4.1 Research Context

Fashion industry is selected as a context in analyzing the creation of a new market. Fashion is a part and a good example of the institution of marketing in representing how different elements of this modern institution operate (Atik and Firat 2013). As the process of fashion entails complex interactions, exchanges, and influences among different people and institutions that are a part of the fashion cycle (Davis 1992), it is a suitable context to study emergence of new markets and systems. Different actors of the fashion system were included in the study to provide a more comprehensive perspective of market formation.

Even though fashion is not only related to clothing, historically and theoretically fashion has referred particularly to clothing, dress, and personal adornment (Wilson 1985; Davis 1992), which have been recognized as effective tools for constructing one's desired appearance (Davis 1992). Therefore, the scope of the empirical part of the study is limited to fashion in clothing. Both fast fashion and sustainable fashion actor-networks were studied to gain a better understanding of the process.

Furthermore, fashion industry, especially clothing production, is one of the industries that have been associated with the exploitation of both resources and people (McRobbie 1997; Wilson 1985; Beard 2008; Fletcher 2008; Morgan and Birtwistle 2009) and there have been calls to re-design the currently unsustainable fashion system (Fletcher 2007; Clark 2008; Cataldi et al. 2010, Dickson, and Grover

2010). Therefore, fashion industry is a suitable context to examine the emergence of a sustainable market. The ethnographic part of the research was mostly carried out in Turkey, as it is an important clothing producer and exporter, which is discussed separately in the following section.

4.1.1 Turkish Clothing Industry

Clothing industry is one of the leading industries of the Turkish economy today, in terms of production, employment, and export earnings. Turkey has been a major cotton-producing country. The modern apparel industry in Turkey was born, along with the industrialization efforts in 1970s. In 1980s clothing industry made major advancements, capturing more than 20 percent of Turkey's total exports by 1990s. There are now more than 29000 clothing manufacturers in Turkey, producing for the domestic and export markets (Turkish Clothing Industry, *ITKIB* 2011).

Turkey's important role as a clothing manufacturer and an exporter, can be partially explained by its comparative advantages such as the relative ease of procuring fabric due to country's high-quality cotton cultivation, availability of raw material sources, and technologically advanced textile production; the low policy costs due to Turkey's access to the European market through a customs union with the European Community in 1996; the relatively low shipping costs due to its proximity to Europe; liberal trade regime and compliance with European Union's technical regulations; and free trade agreements with numerous countries (Tokatli and Kızılgün 2009; Turkish Clothing Industry, *ITKIB* 2011).

In spite of all the above advantages, Turkey is not a low-cost manufacturer and the quota system that restricted textile and clothing imports to Europe and USA ending in January 2005, became a major concern and an obstacle for Turkish suppliers. However, as a result of fast fashion gaining importance, in addition to cost considerations, quick response concerns started to influence sourcing decisions as well. Ability to meet buyers' demands for quick response and short lead times, due to geographic proximity to main markets, such as Europe; flexibility in production; and capability of doing fast fashion, enabled Turkish textile and clothing manufacturers to compete against lower cost competitors, such as China. They started to receive orders from fast-fashion retailers such as Zara and H&M (Tokatli and Kızılgün 2009; Turkish Clothing Industry, *ITKIB* 2011).

Consequently, suppliers have learned to work with short lead times to become successful. On the other hand, being one of the biggest cotton producers; owning large factories manufacturing high-quality textiles; and having short lead times are no longer sufficient to compete in the global market. Along with short development and production cycles, the suppliers also need to be involved in the design process and prepare collections. Therefore, they have to invest in innovation to have the capacity to create design. Along with producing clothes for worldwide famous brands, Turkish suppliers also started to manufacture and sell their own designs and brands (Tokatli and Kızılgün 2009).

As a result, to sustain their competitive advantage in the market, Turkish suppliers need to respond to the demands of fast fashion brands for shorter lead times, higher flexibility, and original design. Role of speed, affordability, and design for Turkey is discussed in detail in the findings chapter. To show Turkey's development and importance as a clothing manufacturer, I share some figures in the following paragraphs. Table 3 shows foreign trade figures of Turkish apparel industry between the years 2005 and 2014.

TABLE 3: Foreign Trade Figures of Turkish Apparel Industry

Years	Exports (USD)	Change %	Imports (USD)	Change %
2005	13.422.476.709		751.144.589	
2006	13.569.690.083	1,1%	1.039.973.044	38,5%
2007	15.577.956.348	14,8%	1.520.571.873	46,2%
2008	15.251.170.762	-2,1%	2.122.526.496	39,6%
2009	12.868.195.771	-15,6%	2.020.994.943	-4,8%
2010	14.205.917.174	10,4%	2.704.270.671	33,8%
2011	15.648.660.734	10,2%	3.165.676.374	17,1%
2012	15.753.400.255	0,7%	2.502.472.382	-20,9%
2013	17.150.270.228	8,9%	2.971.397.265	18,7%
2014	18.499.643.985	7,9%	3.062.519.116	3,1%

Source: Ministry of Economy, February 2015 (Istanbul Textile and Apparel Exporter Associations, ITKIB)

In 2005, Turkey became the world's second largest clothing exporter, with a net export value of 12.7 billion USD, following China (Annual Report, *Istanbul Textile and Apparel Exporter Associations*, 2014). According to World Trade Organization, same year, Turkey's total textile (7.59 billion USD) and apparel exports (13.5 billion USD) made up 4 percent of total world exports (Guleryuz 2011). In 2010, Turkey had 3.6 percent of total world apparel exports, becoming the 5th biggest apparel exporter in the world and the 2nd in Europe. According to Turkish Exporters Association, in 2011 apparel industry became the third industry with highest exports in Turkey after automotive and chemical products (Textile and Apparel Industry Report, *Middle Black Sea Development Agency*, 2014).

Turkey's apparel exports became 18.5 billion USD in 2014, having a share of 11.7 percent in Turkey's total exports (157.7 billion USD). Turkey's leading apparel export markets in 2014 were Germany (20.9 percent of total apparel exports), United Kingdom (13.3%), Spain (8.8%), France (6%), and Holland (5.1%) (Annual Report, *Istanbul Textile and Apparel Exporter Associations*, 2014). Same year, income from apparel exports had 2.9 percent share of gross domestic product and 6.3 percent share of manufacturing industry (Ozdemir, *Hurriyet* July 30, 2015).

Including the uninsured workers, almost 2 million people are employed in the textile and apparel industry in Turkey, of which an estimate of 450000 are in textiles and 1500000 are in apparel industry (Textile and Apparel Industry Report, *Middle Black Sea Development Agency*, April 2014). It is the second industry after agriculture in providing employment opportunities (Guleryuz 2011). Istanbul has the highest employment in apparel industry followed by Izmir (8.5 percent) (Textile and Apparel Industry Report, *Middle Black Sea Development Agency*, April 2014).

Clothing production is especially developed in Marmara and Aegean regions. Main part of the ethnographic research is conducted in a clothing manufacturer based in Izmir, which is the third biggest city of Turkey. In apparel exports Izmir was the 3rd city, with 7.6 percent share, after Istanbul and Denizli in 2011 (*Ministry of Labor and Social Security*, December 2011). Izmir is the leader in organic cotton production in Turkey and the region is one of the highest quality producers of cotton

in the world. However, cotton production is gradually decreasing due to the decrease in cultivation areas. There are around 3500 textile and apparel companies registered in Izmir. Together with textile and raw material exports, apparel exports exceeded 1.2 billion USD in 2011 (Textile and Apparel Production Report, *IAOSB News Journal*, July 2012).

Ethnographic research was conducted in one of the biggest apparel manufacturers in Izmir. It is a privately held company specializing in production and design of mainly circular knit products since 2004. The main customers are worldwide retailers such as H&M, Inditex Group, C&A, George, We, Mango, Mayorel, and Sainsbury. It employs around 1100 people, 900 of which are blue collar workers. Production capacity is an estimate of 2 million pieces per month. 40million Euros of sales were realized in 2014. Design team consists of 13 in-house designers, who follow international fairs, catwalks, trends, WGSN, and prepare collections for different customer groups. Majority of the orders received are from company's own designs. Main strengths of the firm are in line with competitive advantages of the Turkish suppliers, which are quick lead times and strong design. The next section explains the data collection process.

4.2 Data Collection

As a research method I used ethnography with emphasis on participant observation and interaction, supported by interviews and secondary data. In the following sections, I explain these data collection methods. Furthermore, as I work in fashion industry, my extended participation in the context helped me to examine the dynamics of the field and the relations among different actors -designer, supplier, producer, retailer- and their roles, practices, and discourses in creation and diffusion of a sustainable fashion movement. Therefore, I also discuss my role as a participant observer.

4.2.1 Ethnographic Research

How particular projects are to be designed depends on the nature of the research questions and the phenomena to be investigated (Kjeldgaard et al. 2006). In this study, ethnography was used as a research method because it explores the emergence process of a new market rather than testing hypotheses; it works mainly with unstructured data rather than with pre-coded data; and it involves explicit

interpretation, mainly in the form of verbal descriptions and explanations rather than quantification and statistical analysis (Atkinson and Hammersley 1994).

As Murray underlines in one of his presentations on ethnography, in order to understand and describe the culture, it is important to participate and to engage in the flow of activity. Ethnography helps to develop an empathetic understanding of the culture and to understand and describe the context. It brings the researcher close to the context, fosters sensitivity to differences, and encourages depth of thinking (Murray 2013, presentation on "Ethnography for Managers"). These features characterizing ethnography makes it a suitable research method, as it helps to understand the ways sustainable fashion market is constructed by actors behaviors and experiences and to explain patterns of action that are cultural and/or social rather than cognitive (Arnould and Wallendorf 1994).

One of the defining characteristics of ethnography is collecting systematic data and studying and recording human action or behavior in natural settings (Arnould and Wallendorf 1994; Elliot and Jankel-Elliot 2003; Emerson et al. 2011). It is about getting close to the experiences of people studied; developing an understanding of their symbolic world; and using their shared meanings, which also involves learning the language in use (Elliot and Jankel-Elliot 2003). Therefore, participant observation is an important part of ethnography. Extended and experiential participation of the researcher in the cultural context helps to connect with the participants and gain deep insights (Ekström 2006).

The practice of ethnography in marketing is widespread (i.e. Schouten and McAlexander 1995; Thompson and Arsel 2004; Martin and Schouten 2014). However, the notion of doing fieldwork differs between disciplines and studies. A variety of methods including, spending long-term and shorter-term periods in the field, interviews, participant observation, netnography, videography, photography, narratives and storytelling are used today (Ekström 2006). The nature of the phenomenon, the researchers' prior experience and degree of conceptual understanding, and the research questions that emerge during the research process determine the data collection process (Arnould and Wallendorf 1994). Taking into account these considerations, participant observation and interviews were used in this study, along with secondary data.

Ethnography involves both emic and etic experience. Emic is the subjective experience of the informants and explains the behavior of members of a culture according to their own concepts and definitions (Kjeldgaard et al. 2006). Etic is the researcher's interpreted cultural meaning or theoretical accounts of this experience (Arnould and Wallendorf 1994; Ekström 2006). Similarly, in the current study, ethnographic interpretation was based on two major data sources: observation of behavior and verbal reports. Observational data and personal experience in the field provided etic interpretation.

Verbal report data from interviews supplemented observational data in constructing ethnographic interpretation and served to provide emic perspectives of action; perceptions, values, and beliefs of informants (Arnould and Wallendorf 1994). The two ethnographic data sources have different roles, strengths and limitations in building interpretations, which are addressed in section on "assessing trustworthiness of the findings."

Establishing the balance between emic and etic in ethnography is critical because if emic is too much, then the researcher is just focusing on the description of the informants, whereas if etic is too much, then the researcher is just summarizing a theory rather than making a theoretical contribution (Murray 2005). In the current study, data collection consisted of participant observation, in-depth and ethnographic interviews, and secondary data, in order to establish the balance between emic and etic and to consider the criteria mentioned above in determining the data collection process.

4.2.2 Participant Observation and My Role as a Participant Observer

In an academic context, ethnographic fieldwork often involves long-term participant observation and immersion by the ethnographer into a social group, culture, or environment over an extended period (Agafonoff 2006). In nonparticipant observation, the researcher observes and records naturalistic behavior but does not become a part of the event. On the other hand, participant observers can become insiders over time. Considering my profession in the fashion industry and my 15 years of prior experience in the field, participant observation was a relevant technique to use in this research.

I have been working in the fashion industry since 2000. I worked at five different companies, three of which are based in UK. During this time, I had different roles, such as merchandiser, product developer, account manager, and design manager. I have been working as the manager of the design department in a textile company in Izmir, Turkey, for the last three years. It is a supplier of major fast fashion retailers such as H&M, Inditex Group, Mango, George, WE, and C&A.

My research interest in the emergence of a sustainable fashion market evolved couple of years ago, when I started reading about examples of sustainable fashion practices. Prolonged prior engagement in the fashion industry helped me to develop an understanding of and sensitivity to the dynamics of the industry. I wanted to address the serious problems and consequences of fast fashion and examine the process of new market emergence. To this end, I started making observations, taking field notes, and conducting interviews.

The study is based on 30 months of ethnographic fieldwork, which was mostly carried out in a fast fashion supplier in Izmir, from Fall 2012 until Fall 2015. Naturally occurring every day events, settings, interactions, actions, and conversations were observed and recorded during this time period. Table 4 includes the list of customer and internal meetings attended during fieldwork, along with numerous unstructured short conversations. The numbers given are the closest estimates, as there have been many occasions.

TABLE 4: Details of Meetings Attended During Fieldwork

Meetings Attended	Jan 2013- Fall 2015	Location	Group
Meetings with retailers, brands, and designers	116	72 in Izmir 16 in Istanbul 14 in UK 6 in Spain 4 in Dusseldorf 2 in Amsterdam 1 in Belgium 1 Stockholm	51 with UK customers (i.e. George, Matalan, Tesco, Primark) 39 with other European customers (i.e. C&A, WE, Hema) 18 with Inditex Group 8 with H&M Group

Internal Meetings	50	Izmir	Production, Sales and Merchandising, Fabric and Accessory Sourcing, Design and Sampling Departments
Unstructured Casual Conversations	Numerous	Various	Various

Observations or data gathered through casual conversations and experiences, and during meetings were jotted down as scratch notes during the day and typed as soon as possible afterwards as field notes. Actors, activities, place, time, objects, acts, events, and feelings were recorded. In the field, focus was on details such as what the people were doing; how they were communicating; what they were discussing. These field notes document action, its setting, participants' explanations, passages of conversation, and the observer's notes on the events (Arnould and Wallendorf 1994).

The research may not be considered as a multisited ethnography as field work was mostly carried out in a fast fashion supplier. However, field notes were also taken in meetings in fast fashion retailers and interviews were conducted in fashion academies and institutions. Therefore, the study carries some of the advantages of a multisited ethnography, such as providing different perspectives; enabling the researcher to become aware of different experiences and relationships; and helping to make associations and connections among sites that make up the system (Ekström 2006; Kjeldgaard et al. 2006).

When the researcher's role in producing and creating knowledge is discussed, Rabinow (1977) argues that the participant observer is influenced by the collection of cultural data and it is scientifically legitimate to include the researcher's own experience in a study. Furthermore, access to the field becomes easier if one has previous experience (Ekström 2006). Similarly, having a full time job in fashion industry enabled me to gain access to various formal and informal settings and to obtain valuable longitudinal perspectives. My extended participation helped me to examine the relations and the conflicts among different actors and their roles, practices, and discourses in creation of a sustainable fashion market.

The main goal of this ethnographic research is to develop an understanding of the process of emergence of a sustainable fashion market over time. In this regard, my professional experience and being immersed in the context becomes important. Working in a supplier enabled full-time ethnographic immersion in the field. I was a full participant, observing the actions of the people along with my own embodied, subjective experience. The nature of my ethnographic involvement allowed me to interact with different actors as an insider; and understand their experiences, relations and conflicts.

One of the benefits of working in the industry and being personally involved was more frequent and prolonged contact with the actors. Data collection was more continuous and spontaneous as encounters during the day could often turn into data collection opportunities. As a result of being a full-time ethnographer, it was possible to gain additional insight into processes, events, emotions, behaviors, and acts. Furthermore, having worked in the fashion industry for the last 15 years, both in Turkey and in UK, enabled me to gain insights and perspectives that would have been difficult to achieve through less sustained involvement.

On the other hand, the outcome of increased ethnographic involvement can lead to the problem of over involvement, in which case the researcher gets so close to the phenomenon under study that it becomes impossible to maintain a balanced, scholarly perspective (Schouten and McAlexander 1995). To safeguard against over involvement I employed critical self-examination. As I have been deeply immersed in the industry as an actor, I had to make conscious effort to maintain scholarly distance from the phenomena I was experiencing and observing, as suggested by Schouten and McAlexander (1995).

Naturalistic research findings may also lack integrity because of biases of the researcher. Therefore, researcher self-analysis and introspection becomes very critical in ensuring the integrity of research findings (Wallendorf and Belk 1989). It is important not to take anything for granted and recheck especially to discover the true feelings. It is also crucial not to allow knowledge and feelings to interact with the respondents (Mariampolski 2001). To avoid these problems I kept a record of my cognitive and emotional experience, of my personal frame of mind, biases, feelings, and thoughts in order to clarify my own assumptions and expectations, as suggested

by Wallendorf and Belk (1989). Self-knowledge and self-analysis helped me to become aware of and assess the potential effects of the biases. Furthermore, recognition of my personal biases has become an important learning experience for me.

4.2.3 Interviews

Observational data if used alone have limitations. It does not reveal the perceptions, values, beliefs, and internal states of informants. Such information can be obtained through unstructured interviews or questioning during participant observation. Therefore, ethnographers prefer to expand their data sources beyond data obtained through observation (Arnould and Wallendorf 1994).

In the current study, data obtained from participant observation was combined with verbal report data elicited in ethnographic interviews to explain phenomenon of interest more thoroughly. Both ethnographic and in-depth interviews were carried out with different actors on the institutional side of the fashion industry, to be able to understand how a sustainable fashion market has emerged; the dynamics that mobilize different actors to participate in this movement; points of conflict and paradoxes; and what is keeping (or encouraging) the network from mobilizing.

Ethnography makes use of small samples of informants, which can be referred to as opportunistic samples. Similarly, in the current study, the informants were selected in the course of an emergent design. Judgmental sampling was used to seek out people who have specialist knowledge in the area and who are likely to give rich data because in ethnography, "to develop a thick description and to tackle with multiplicity of complex structures, it is advised to go for depth not breadth, understanding not prediction" (Elliot and Jankel-Elliot 2003, p. 216). The informants were selected purposefully according to their different roles and experiences. They differed along characteristics such as age, gender, work experience, and job title. The diversity of the informants enhanced the validity of emerging interpretations through triangulation of data across informants, as discussed further in section on assessing trustworthiness (Schouten and McAlexander 1995).

Actors interviewed were mainly clothing marketers (designers, sales manager, product developers, and merchandisers). However, other actors were also included as informants such as academic director, owner, consultants, and business

and research manager. During the interviews most of the informants made comments as a fashion consumer as well. However, consumers were not interviewed separately as the main purpose of this study is to focus on the institutional side of market emergence.

I formally arranged some of the interviews (See table 5). Others arose spontaneously out of informal conversations between me and the participants, or from my questions during the observations, as addressed in the previous section on participant observation. The formal, semi-structured interviews were audiotaped and then transcribed for analysis. These interviews mostly involved individual informants and were mainly conducted at their work. Only one of the interviews was a group interview. Interviews ranged from 30 minutes to over an hour. Table 5 includes details on the interviews and informants.

TABLE 5: Details of the Interviews and Informants

	Date	Gender, Age, Nationality	Job title, Place of Work	Job Description
1	March 2013	Female, 28, Spanish	Designer, Barcelona	She works for a Turkish supplier and designs for fast fashion retailers such as Inditex.
2	March 2013	Female, 30, Turkish	Designer, Izmir	She works for a Turkish supplier and designs mainly for fast fashion retailers.
3	March 2013	Female, 41, Turkish	Sales Manager, Izmir	She works for a Turkish supplier and manages the merchandising team.
4	April 2013	Female, 41, Turkish	Product Developer, London	She works for Turkish manufacturers to help them develop their collections.
5	May 2013	Male, 35, Turkish	Merchandiser, Izmir	He works for a Turkish supplier. He is the merchandiser for Inditex group.

6	May 2013	Male, 42, Turkish	Merchandiser, Izmir	He works for a Turkish supplier. He is the merchandiser for UK retailers.
7	October 2013	Female, 42, Turkish	Academic Director, Istanbul	She is the academic director of a Fashion Academy in Istanbul. Previously she worked as an instructor at a Design Institute in China.
8	October 2013	Female, 38, Turkish	Product Developer, Istanbul	She works in research and development for a big fast fashion retailer. Previously she worked for manufacturers of fast fashion retailers.
9	December 2013	Male, 57, Turkish	Owner, Izmir	He is the owner of a Turkish supplier of fast fashion retailers.
10	February 2014	2 Females and 1 male, 30s, Turkish	Consultants, Istanbul	They work for a Sustainability and Communications Consultancy in Istanbul.
11	February 2014	Male, 40s, British	Business and Research Manager, London	He works at a Sustainable Fashion Center at a Fashion College in London. He works with clients, collaborators and SMEs on product development, communications, and business planning. He delivers seminars and workshops on fashion and sustainability.
12	December 2014	Female, 30s, Turkish	Designer, Istanbul	She has her own brand since 2006. She is also working as the design manager of a textile company in Istanbul. She is a member of Istanbul Fashion Incube project. She uses ecological, recycled, and local materials in some of her collections.
13	December	Female, 32,	Freelance	She worked in fashion industry as

	2014	Turkish	Designer, Istanbul	a designer for 10 years. In 2012, she quit and she is now working as a freelance artist and has upcycling projects and workshops.
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*Interviews are listed according to date of interview.

A key aspect of ethnographic interviews is to focus on the use of non-directive questions in order to stimulate the interviewee into talking about the particular broad area (Elliot and Jankel-Elliot 2003). Along with "daily routine" and "life history" questions, a general guideline was followed in the semi-structured interviews (See Appendix 1 for Interview Guideline). Interviews are used to elicit emic meanings. Therefore, open-ended probes were used to better understand the informants and to elicit deeper insight (McCracken 1988b).

On the other hand, in the informal interviews and casual conversations, I did not necessarily follow a written list of questions. The conversations took place in a wide variety of contexts, such as while working with informants, at meetings, at lunch time, and during customer visits. The objective was to get close to the experience. Lots of rich data came from these informal talks.

4.2.4 Secondary Data

Secondary data such as news, blogs, and various online sources on sustainability and sustainable fashion were used to support the findings. Secondary data was collected to show that sustainable fashion market actually exists and to examine the dynamics of this market and actor-network. Table 6 provides list of the secondary data used, which is grouped under 10 main topics: remedies; conscious collections, recycling, and upcycling examples; consequences; fashion weeks, fairs, seminars, and awards; discussions and paradoxes; actions of retailers and brands; industry information and consumer insight; projects, funding, and collaborations; criticisms, protests, and tragic events; and other examples and initiators of change. Appendix 2 contains details of the secondary data used in the study.

TABLE 6: List of the Secondary Data

Topic	Examples
Remedies	22 secondary data related to remedies
Conscious Collections, Recycling and Upcycling	21 secondary data on Conscious and eco collections, recycling and upcycling
Consequences	15 secondary data on consequences of fast fashion
Fashion Weeks, Seminars, Awards	14 secondary data related to sustainable fashion weeks, fairs, seminars, and awards
Discussions and Paradoxes	12 secondary data related to discussions and paradoxes
Actions of Retailers and Brands	11 secondary data on actions of retailers and brands
Industry Information and Consumer Insight	9 secondary data related to industry information and consumer insight
Projects and Collaborations	9 secondary data on projects, funding and collaborations
Criticisms and Protests	8 secondary data related to criticisms, protests and tragic events
Other Examples and Initiators of Change	8 secondary data on other examples and initiators of change

Prolonged engagement in the field, persistent observation, and redundancy in the data gathered from observations and interviews signify that sufficient data was gathered. Saturation point was reached when meaningful comparisons between groups and individuals were made and when I started hearing similar responses and comments (Mariampolski 2001). Data collection was ceased when the point of data saturation or redundancy was reached (Glaser and Strauss 1967). The next section discusses the data analysis process and methods used to assure the trustworthiness of the findings.

4.3 Data Analysis

Ethnography is an inductive process. Findings result from a constant, iterative process and theoretical presuppositions are made in an interpretive frame (Denny 2006). Similarly, collection and interpretive analysis of ethnographic data and triangulation of findings were iterative throughout the current ethnographic process. During data analysis and interpretation building, I had continuous engagement with data from field notes and interviews. I constantly questioned my presuppositions about the topic and the data was produced in interaction with the participants.

Based on the processes described by McCracken (1988b) and Arnould and Wallendorf (1994), I collected, coded, compared, and broke down data to form themes and categories. Then, a conceptual framework was developed to unite all the themes in a holistic manner (Schouten and McAlexander 1995). Content analysis of field notes, interviews, and secondary data helped me to construct summary themes and the findings were continually refined as part of an emergent design.

In ethnographic interpretation, redundancy and variety in the data are needed to develop an emic representation of similarities and differences and for developing an etic interpretation that builds theoretical insight from emic perspectives (Arnould and Wallendorf 1994). Therefore, as explained previously in data collection section, multiple data collection methods were used in the research to be able to examine different experiences and perspectives provided by various ethnographic data sources.

Ethnographic interpretation aims to explain the reason and importance of recurring features, acts, behaviors, or statements. Therefore, as explained by Arnould and Wallendorf (1994), it must go beyond establishing codes and themes that are repeated in emic statements and practices. Similarly, in the current study, themes were developed and compared across informants and multiple data sources. I interpreted the verbal reports and observations and explored the connections between data gathered through different methods, to identify convergences and disjunctures in order to provide a *thick description* of market emergence.

4.3.1 Assessing Trustworthiness of the Findings

The trustworthiness of an interpretation is based on whether the data provides sufficient conceptual depth, repetition, and variation to account for convergences and

disjunctures in perspectives (Arnould and Wallendorf 1994). Assessing trustworthiness of the research is critical to have confidence in the findings; to ensure that the findings emerge from the context and the respondents and not solely from the researcher (Lincoln and Guba 1985); and to assure that the findings are not based on false information from informants (Wallendorf and Belk 1989).

The set of criteria for evaluating trustworthiness of positivist research methods, such as internal validity, external validity, reliability, and objectivity, are not appropriate when the research is based on a post-positivist philosophy and employs participant observation and ethnographic methods because a single external reality is not assumed by post-positivists and there is no goal of generalizability. Furthermore, the research attempts to understand a dynamic phenomenon and therefore, it can neither be stable nor replicable (Lincoln and Guba 1985). Therefore, there are different criteria to assess trustworthiness when qualitative research methods are employed.

Lincoln and Guba (1985), Wallendorf and Belk (1989) suggest several research techniques to enhance trustworthiness when ethnographic methods are used. Some of these criteria and techniques were used in data collection and analysis stages of the current study such as; prolonged engagement and persistent observation; triangulation of sources and methods; negative case analysis; debriefing by peers; seeking limiting exceptions; purposive sampling; and reflexive journals. Furthermore, special attention was paid to theoretical candor, transparent demonstration of data collection, and explanation of the relationship between ethnographic interpretation and field notes, as suggested by Sanjek (1990).

Prolonged engagement and persistent observation was one of the methods used to increase trustworthiness and credibility of the findings. I spent sufficient time in the context, which is critical to acquire depth of understanding of the phenomenon, group, or culture. However, in familiar contexts there is the danger of being too familiar with the phenomena. To avoid this, I intentionally kept my academic distance, as explained in section "my role as a participant observer." Overt conduct of research allowed me to ask questions and probe issues. This open recruitment and involvement enabled me to understand the context more quickly (Wallendorf and Belk 1989).

The length of time appropriate to spend in a particular context or the duration of the engagement depends on the purpose of the research, the prior experience of the researcher, explanations of the informants, and observations of the actual behaviors (Wallendorf and Belk 1989). Reporting the amount of time spent at a site is important in establishing trustworthiness of the interpretation (Adler and Adler 1987). In the current study, participant observation was carried out and field notes were recorded during the period from Fall 2012 until Fall 2015, as stated previously. Moreover, previous experience in the fashion field enabled me to gain extensive knowledge of the dynamics of the industry.

Prolonged engagement also facilitated construction of trust and cooperation with the informants, helping to increase the integrity of the research. Problems with integrity may arise leading to misinformation, lies, and avoidance, when there is conflict between the researcher and informants; when informants fear or dislike the researcher, or when they try to present themselves in more attractive ways (Wallendorf and Belk 1989). Prolonged engagement through participant observation enabled me to learn the language, the phenomenon, and the characters of the informants, and relations within the group, which helped to build trust and enhance integrity.

The second means of enhancing trustworthiness during data collection was through triangulation across sources and methods. However, rather than using multiple data sources and methods to achieve convergence in interpretations, they were used to generate varying perspectives as (Arnould and Wallendorf 1994). Triangulation across sources requires the researcher to develop interpretation based on data acquired from interaction with several types of informants, according to the purposive sampling plan. For this reason, in current study interviews were carried out with informants who have different roles within the fashion system, in order to have a varied representation (See Table 5).

Triangulation across methods requires the researcher to test an interpretation in data gathered using several methods (Wallendorf and Belk 1989). It can also incorporate secondary data. In this research, triangulation across sources was used to further strengthen the credibility of the findings, which were not only based on interviews but were also supported by field notes and secondary data. I used data

from press and online sources as an additional source in constructing interpretation. Data gathered through participant observation, interviews, and analysis of secondary data was treated comprehensively. All parts of the data was inspected and analyzed so that the results were integrated.

One of the shortcomings of qualitative research regarding validity is anecdotalism, which is depending on a few well-chosen examples chosen from field notes and not providing the criteria for including certain instances but not others. Data triangulation also helped to overcome this potential problem of lack of representation of research materials by combining different findings and different ways of looking.

Triangulation across sources and methods also helped to establish integrity. Comparing the information gathered using different informants and data collection methods enabled to check the accuracy of the information and the extent to which it is shared (Wallendorf and Belk 1989). Spontaneous statements by respondents were valued along with responses to the questions.

Probing and self-revelation techniques were used during the interviews in order to gain deeper insight and to make the interview more natural to informants (Wallendorf and Belk 1989). Safeguarding informant identity is important. I explained to the informants how the information provided will be used and that informant anonymity will be assured. Pseudonyms were used in field notes and reports.

To guarantee objectivity and enhance trustworthiness, I kept notes of events seen, overheard, or experienced during fieldwork; and my personal frame of mind, biases, and interpretations. These notes taken during field research provided my personal reflections and some became primary data about the phenomenon of interest. They also helped to enhance confirmability (Wallendorf and Belk 1989). Confirmability, which is another criterion for assessing trustworthiness, is establishing "the degree to which the findings of an inquiry are determined by the respondents and the conditions of the inquiry and not by the biases, motivations, interests, or perspectives of the inquirer" (Lincoln and Guba 1985, p.290).

In constructing a credible interpretation of ethnographic data, Lincoln and Guba (1985) suggest to use negative case analysis in which the researchers construct

an interpretation and then modify it as they encounter instances that provide negative support for the original hypothesis. Purposive sampling insures that it is the researcher's obligation to seek negative instances and data which is likely to not confirm the emerging hypothesis (Wallendorf and Belk 1989). Similarly, in current research, to construct a credible interpretation, deliberate attention was paid to negative cases and to marginal people and events. Rather than treating deviant cases as insignificant, they were examined in detail to see if the overall argument needs to be modified, to strengthen the validity of the findings.

Researchers should periodically meet with peers who are not researchers on the project but they will serve to critique and question the emerging interpretation (Lincoln and Guba 1985). During the current study, I had regular meetings with my advisors and professors and their critiques and feedback were taken into account in finalizing the emerging interpretation. As a result, having an emergent design and the various data collection, sampling, and research techniques and approaches followed enhanced trustworthiness of the findings.

So far, I provided an overview of the literature, earlier research, and literature gaps; stated the research questions the study responds to; explained the research context; and discussed the conceptual framework, the data collection and analysis methods used to understand the dynamics of new market formation within the field of fashion. The next chapter includes findings based on analysis of the interviews, field notes, and secondary data.

5. FINDINGS

Results of the analysis are grouped under six main findings sections. The first three sections -speed, affordability, and design- are about the main characteristics of the current fashion industry and the outcomes related to speed, affordability, and design. The fourth section is on barriers to mobilization of a sustainable fashion market and the driving factors and dynamics that mobilize the actors to seek market change. The fifth section provides examples on sustainable fashion practices, products, companies, and brands, to show that a sustainable fashion market actually exists. The last section of findings is on initiators of market change.

Fashion has different meanings and connotations, which was reflected in most of the interviews and field notes. As the empirical part of the study was carried out with actors working on the institutional side, fashion was often related to work. It was associated with innovation, newness, and change, and regarded as a necessity, a requirement, and an obligation to follow often for work or for personal reasons. Fashion was also associated with fast consumption and availability of cheap clothing. It usually evoked conflicting feelings and thoughts such as being related to popularity and excitement as well as being a trap. These conflicting perspectives and paradoxes are critical in setting the barriers and driving factors in emergence of the new market within the system.

The purpose of my thesis study is to examine this process of market emergence in context of fashion. In this regard, characteristics and dynamics of the fashion industry are important to address in understanding the consequences of the current fast fashion system and future prospects of market emergence. Speed of availability and offering latest fashion trends at affordable prices are among the most important characteristics of the industry today. These dynamics of the system bring along some positive and negative consequences, which are highlighted in the following sections.

Some of the positive aspects of the current fast fashion system are: enhancing economic growth and earnings by providing job opportunities and enabling the development of businesses; becoming an inspiration and providing grounds for technological developments and innovations; democratizing fashion and enabling its diffusion and use by many; and enhancing satisfaction by fulfilling people's desire for new and change.

On the other hand, there are negative consequences of the current fashion system as well, such as leading to deterioration of resources and increasing textile waste; promoting unnecessary consumption; having negative consequences on welfare of workers and consumers; leading to dissatisfaction and unhappiness; and promoting copying and lack of originality.

Furthermore, the three main characteristics of the current fashion system- speed, affordability, and design- are closely related to each other and both hinder and facilitate the emergence of a new market within the system. All of these dynamics and paradoxes are discussed in detail in the following sections.

5.1 Speed

Fashion is dress in which the key feature is rapid and continual changing of styles (Wilson [1985] 2003, p. 3).

Review of literature and analysis of the interviews, field notes, and secondary data reveal that speed is one of the main characteristics of the current fashion system. Over the last 15 years, the fashion industry has undergone a profound transformation. One of the changes is the speeding up of the fashion system (Tokatli 2008; Tokatli and Kizilgun 2009; Cline 2012; LeBlanc 2012). The three-month production cycle, which often includes the time it takes to design, manufacture, and distribute clothing to stores, has decreased to three to eight weeks. A design from a runway show can be adapted very quickly and make it to the stores within a month (Tokatli 2008; Cline 2012; LeBlanc 2012; Moon 2014; Godelnik 2014). This turnaround between design conception and placement in a store can decrease down to even 13 days (Noble 2014). Consequently, the fashion industry today is trapped in a competitive cycle of shorter and faster sales and production periods.

As explained in detail previously in the literature review section, originating in the late 1990s, fast fashion model is based on speed and quick response. It is led by Spanish high street giant Zara, whose target is consumers who are passionate about fashion and trends. This new type of shoppers wanted catwalk looks at high street prices and they wanted them at once. Soon most of the high street retailers sensed this opportunity and started producing more fashion items, offering them to the consumers immediately at diminishing prices (Styles 2015).

Trends run their course with lightning speed, with today's latest styles swiftly trumping yesterday's, which have already been consigned to the trash bin (Joy et al. 2012, p.273).

Joy and colleagues definition of fast fashion underline this immense speed of the system. Trends change frequently and there is a continuous supply of new themes and new designs. There are no slow periods. Chief fashion critic of the New York Times, Journalist Vanessa Friedman drew attention to the fact that the system is based on planned obsolescence and designers are expected to create at least six to eight collections a year (Rickey May 1, 2014). The rate in which new styles are added and stock is turned over in stores is unbelievable. Instead of having four seasons of fashion, fast fashion retailers like Topshop, Zara, H&M, and Forever 21 bring new collections in store almost every week in order to keep customers coming back (Tokatli 2008; Tokatli and Kizilgun 2009; Cline 2012; LeBlanc 2012). For instance, Topshop releases around 300 styles a week (Noble 2014).

Fast fashion is obviously a term that is being used specifically in relation to the high street retailers and the 16 collections a year model that actually means that the products are on the rail or on the shelves no more than 3 weeks or 4 weeks. We have this system where newness and the availability of something that looks like it is different from the thing that was there few weeks before is absolutely necessary part of retail because it is what customers have come to expect. This also has some implications... High fashion has evolved and changed to be able to meet that demand that fast fashion has created in the consumer. We see that pre-collections in the luxury sector is a response to the fact that retailers are so desperate for new

products all the time that they are not really interested any more in just buying one collection a year but at least 4 collections a year so that they got that turnover of stock. It has a huge impact and I think it is connected to so many different things. It is connected to the way we consume everything. It is connected to the way we consume information; the speed with which the information is there; the social media; and the proliferation of internet sites that promote fashion in all sorts of different ways. This pretty much tells us that we really need to be looking at something new all the time. If people are looking at something new, they feel that they should be wearing something new and that is the problem (Business and Research Manager, Male, 40s).

Speed was associated with the current fast fashion system in most of the interviews. The fast fashion description of a business and research manager, as quoted above, addresses the speedy circulation of products and attracts attention to three key requirements of the current fashion system, which are speed, newness, and change. These characteristics of the fashion industry are closely related to each other. To ensure continuous consumption speed becomes critical as fast fashion retailers need to fulfill consumers' desire for new by constantly providing new offerings and by rapid change (Joy et al. 2012).

Lucy Siegle, in her article at *Ecouterre*, describes Zara's way of working, which is one of the most successful fast fashion business models. Rather than taking nine to 12 months and using forecasters and analysts to decide on styles, colors, and fabrics, Zara set up a large production team at Inditex's headquarters at A Coruña, who gets constant feedback from trend-spotters on the ground about consumers' view of what's hot and what's not. Based on this feedback the stores receive new fashion items twice a week. Zara's system enables the goods to be distributed to all the stores within one week after being shipped. Instead of holding onto lots of stock and assessing for quality, retailers started to follow Zara's way of getting what is new and swapping two wardrobe seasons a year to up to 20 seasons (Siegle 2011).

As a result, the realized growth of the fast fashion market has been astonishing. Conventional apparel retailers and the traditional apparel model of selling seasonal lines of clothing, manufactured and marketed months in advance, has been replaced by affordable brands that rapidly respond to the latest fashion

trends enabled by just-in-time production (Gonzales 2015). Consumers both got used to and have loved this fast system, which has some positive consequences such as delivering economic growth; fulfilling desire for new and change; and enhancing excitement. On the other hand, the immense speed of the fashion system inevitably has negative outcomes on environment, natural resources, society, and workers, such as leading to stress and uncertainty; increasing waste and disposability; leading to overstock; and decreasing value and uniqueness. Both the positive and negative outcomes of speed are examined in the following sections. However, first I discuss speed as part of contemporary consumer culture and the importance of speed for the Turkish market.

5.1.1 Speed as Part of Contemporary Consumer Culture

Fashion is a central element of current consumer culture and it represents elements of contemporary society (Atik and Firat 2013). Today, there is fast consumption in all areas, not only in fashion. However, fashion is especially bad.

...It is also related to consumption habits. We don't only consume fashion all the time. Remember the number of times they bought toys to us when we were kids and compare it to the number we buy to our kids today. People even consume mobile phones quickly; they think about which iphone to buy almost every month. Therefore, the t-shirt they buy becomes insignificant compared to the other big items consumed. If the end consumer does not develop awareness it is difficult for the system to change... (Academic coordinator, female, 41).

Informants gave examples of fast consumption both from fashion and from other industries, such as mobile phones and toys. Consuming a t-shirt quickly becomes insignificant compared to other expensive items. People no longer wear something for a long period; until it gets really old (Owner, male, 57). Consequently, at an era when everything is consumed so fast, it seems unlikely for fashion to slow down.

I do not approve of fast fashion. We need to have it as we earn money from it however it is a trap for people to consumer more. It is especially a trap for the younger ones. I do not think that fashion which is consumed this quickly is fashion in

real sense. It does not make sense. It only serves to increase consumption. However, everything is fast now and consumed quickly. Fashion is a part of this culture (Sales manager, female, 41).

People got used to buying and throwing away so quickly without considering the consequences. There are informants who are not happy with the speed of consumption. One of the informants highlights that we have no right to use things once and throw them away so quickly. We need to consider the carbon footprint (Designer, female, 32). Another one states that she is not happy with textiles being only consumption oriented. She believes that textile products should not be short lived and manufactured for so cheap. People need to make use of a product for 10-20 years. However, this is against today's consumption culture and fashion that is a part of this culture needs to be fast (Designer, female, 30).

In a panel that she attended at Istanbul International Arts & Culture Festival, Livia Firth, the founder of Eco-age, tried to attract attention to consequences of having two collections in a week as opposed to in a year. She underlined that people's habits and psychology of buying clothes have changed. 20-30 years ago, people thought a lot before buying something. They saved money to buy clothes with good quality that they can use for longer. They mended and used their mothers' or relatives' clothes. Today, people buy something just for the sake of buying, without thinking, without consideration, and use it only for a short time before throwing it away. As the speed of production and consumption continues, it is difficult to change this consumption sprint (Bursaligil 2015). Consequently, speed has become an inevitable part of the contemporary consumer culture and of fashion, which is a part of this culture.

5.1.2 Role of Speed for Turkey

Speed and quick response, along with fashionability, are especially critical for Turkish suppliers to have more business because Turkey is often considered for orders with short lead times.

Turkish manufacturers used to sell easily before. Fashion was not used to be this fast. However, with China and Bangladesh manufacturers entering the market, price competition began. Turkey is not able to compete on products with cheaper prices

and long lead times. Therefore the Turkish manufacturers need to sell more fashionable items with short lead times. It took time for Turkish suppliers to get used to this system and mentality. The adaptation period was long, which was the main problem in Turkish textiles for some time. They got quicker now but some still carry on the old habits and act as if they can sell easily. However, it is not that easy any more. The price that the retailer will sell at is pre-determined. Suppliers need to make sure that they make garments that fall into that price range. They need to work in such a way that you have the right products, at right time, at right price (Sales manager, female, 41).

Previously Turkish producers were able to sell effortlessly, in easier conditions, as fashion was not this fast and competition was not as fierce. When China and Bangladesh entered the competition, the price started to become a problem and Turkey could no longer get orders with long lead times. Therefore, Turkish suppliers had to get used to fast fashion mentality and start working with short lead times to have business, as they could no longer compete on price.

All the companies are asking for fast fashion and quick response. In this respect, Turkish suppliers offer many things: design, different fabrics, and quick lead time (Sourcing director, male, 40s).

Turkey is for speed market and speed orders (Research and developer, female, 30s).

In the current fashion system, many retailers are aware of the importance of offering fast fashion and quick response and Turkey's role in this respect. Lead times from Far East are three to four months. Therefore, retailers use suppliers from Far East for regular intakes and long term orders (i.e. orders with six months lead time or longer). They buy the short term orders from Turkey (i.e. orders with two months lead time or shorter). Likewise, in many of the meetings attended Turkish suppliers' competitive advantage in offering short lead times and quick response was stressed.

Meetings attended show that, especially when the retail sales are tough, retailers prefer to buy less from China and Far East. As the lead times are longer, by the time the goods are in store, the colors and trends may change, so they cannot sell these products. It is less risky to buy from Europe and Turkey since they offer shorter lead times and fast fashion items rather than basics, and they are more flexible.

Furthermore, retailers prefer to see the sales results and based on early indications they need quick re-buys, for which they need shorter lead times. For quick lead times, most retailers need to supply close to home, as lead times from China are too long. Retailers that previously mainly sourced from China and had little sourcing from Turkey, want to increase this percentage. Especially for repeat orders, lead times become more important. Furthermore, there are often styles or trends that retailers think that they have missed in their initial collections. They need quick response for these styles as well. For all these reasons and occasions supplying from Turkey becomes interesting.

General Manager of a supplier based on a meeting that he recently attended stated that currently around 50 percent of textile production is in China and approximately 3 percent is in Turkey. However, Chinese production for Europe will decrease as their production will soon only cover their internal demand. The orders that they cannot fulfill are expected to shift to Africa, Europe, and Turkey. As a result, importance of Turkey in textile production will increase further (General Manager, male, 45).

On the other hand, retailers cannot work with Turkey the same way they work with Far East. As a result, both the retailers and suppliers need to work according to quick lead time shipments and orders. Lead times have gotten even shorter. Turkish suppliers sometimes need to ship in six weeks to be able to get orders (Owner, male, 57). Apart from production lead times, the sampling process from Turkey has speeded up as well.

In most of the meetings attended the designers and buyers of different retailers selected many styles and requested all the development samples to be sent in one or two weeks. The styles most often had different options, fabrics, trims, prints, and embroideries. Retailers usually had development meetings around similar times and requested samples to be sent on similar dates, which put a lot of strain on the sampling department. Furthermore, retailers complained if suppliers cannot fulfill these deadlines.

Consequently, even though fast speed of production and sampling process brings along many difficulties, quick repeats and quick response are becoming even more important in the current fashion system. Speed has become an asset and a

marketing tool for Turkish suppliers to gain more business. Therefore, it is critical for the fast fashion system to maintain its current speed for Turkish suppliers to sustain their business. Shifting to a more sustainable and slower fashion system can have negative consequences on the Turkish textile and clothing industries.

5.1.3 Speed as Enabler of Economic Growth

As mentioned at the beginning of the section, speed has both positive and negative consequences. One of the most important positive outcomes of speed is economic growth. Fast fashion is a multi-billion dollar industry and it's growing (Gonzalez 2015). Speed and quick lead times have become an asset and a marketing tool for fashion suppliers and retailers, which enable them to generate more business, leading to economic growth. This is in line with some of the earlier findings which argue that high speed in fashion is a tool to increase sales (Fletcher 2010). Rapid changing of styles leads to frequent renewal of products, so that the market constantly grows (Wilson 1985; Atik and Firat 2013). Speed of availability and offering latest trends at affordable prices make the industry attractive to consumers (Joy et al. 2012).

Shopping sample is sent in one day; development sample can be done in two days and customer can have the development in three days. If the suppliers are aware of this power and can use it, they can become very successful. If everything is organized well, there is no reason why it cannot be done (Product developer, female, 41).

Informants addressed the importance of speed as an enabler of growth and success as well. Fashion system has evolved to be able to meet the demand that fast fashion has created in the consumer and this current commercial model of fast fashion is very successful. Eventually, speed has become a tool to gain competitive advantage both for suppliers and retailers who are aware of the advantages of being quick.

On the retail side, aim of the retailers is often to grow, to get bigger, and to have more sales. Retailers like H&M and Zara open 500-600 new stores every year and they grow in 25-30 countries which gives them the power to become trend setters and to dominate the industry (Owner, male, 57). Speed is a critical tool for

their success, as retailers that are slow in changing their window displays; offering fashionable items; and following trends, lose sales. On the other hand, the system is rewarding for companies that are fast as the ones that have different goods in stores frequently, sell more and earn more (Sales manager, female, 41).

It was stressed in a supplier workshop held in Istanbul in July 2015 that, market shares of major fast fashion retailers in ladieswear in Europe increased between the years 2009-2014. For instance, market share of Inditex group increased from 3.5 to 4.6 percent; H&M increased its share from 3.1 to 4.2 percent; Primark increased it from 0.9 to 1.9 percent; and C&A almost remained the same at 2.5-2.6 percent. Looking at the success of these high street retailers, even the luxury sector has pre-collections now and the retailers are desperate for new products all the time so that they have constant turnover of stock (Business and research manager, male, 40s).

Inditex's chairman José Maria Castellano, who is known for coming up with Zara's "*blink-and-you-miss-it-fashion*," states that "*this business is all about reducing response time. In fashion, stock is like food. It goes bad quick.*" The secret behind Zara's success is short lead times, multiple seasons, reduced delivery times, and not keeping lots of stock. Normally fashion retailers discount 35 to 40 percent of their merchandise, whereas Zara set up such a system that it discounts around 18 percent of its products (Siegle 2011).

We can ship in three to six weeks. Everything is speeding up. Crazy times! One of the biggest fashion retailers for instance works in three ways. They buy from our collection; they develop their own styles; and they have a fast fashion model which started 4 months ago. The speed is unbelievable. Their buyers and designers go shopping in London. They make a design pack; they choose fabrics, shapes, and graphics. They invite main five or six suppliers to their office in Istanbul. They present the range to all the suppliers at the same time and ask everyone to send the samples and the prices in two or three days. Suppliers which have the best samples and best prices get the orders and they need to ship in four to five weeks. Everything in trend is in store in five weeks. Last time, they did not even invite the suppliers to give the briefing. They just sent all the information via mail. The suppliers are fighting to get the orders and it is working because they put million pieces on the

table and everyone tries to get these orders... (Owner, male, 57). (Rest of the quote is related to design.)

Fast fashion project of one of the biggest fashion retailers is another good example of the success of this model, as it enables both the retailer and its suppliers to gain more business and increase their sales. One of the suppliers even used this model as a marketing tool to show to other retailers what the company can achieve in regards to speed.

It is a difficult customer. They want a discount or cancellation for a slight delay. It is difficult to work like this but we need to achieve a certain turnover. We do not have the luxury to say no to customers. Therefore, we need to make a time and action plan to meet the shipment date and everyone needs to do their best to make this happen (Owner, male, 57).

Everything is very slow at your company. Orders, print approvals, lab dips, samples, everything. We are the fastest fashion retailer. We do not have time. You are much too slow. We can work on design. I am not worried about that. I am more worried about the production side. Sending of size sets, colors for approvals, supply of everything is very slow compared to other suppliers. Even before production, at approval stage, I am afraid that it will not be on time. Therefore, I always think twice before placing orders with you. All suppliers need to understand what our company needs. We need priority and speed (Buyer, female, 40s).

Speed is also critical for suppliers to sustain their business. Retailers often complain when suppliers are slow in replying back to their requests. Long lead times, both for production and development, are not acceptable especially for fast fashion retailers such as Zara and H&M. They want to receive development samples in two or three days. Six or seven days sampling time is often not satisfactory. Most retailers require developments to be quicker and they do not tolerate delays in shipment as it affects their sales (Buyer, female, 30s).

Notes from meetings attended indicate that even one week can become important. Retailers request four to six weeks lead times to fill quick buys, for orders of styles that they missed to place at pre-selection stage, and for repeat orders of best sellers. Companies that act quicker are often preferred. Being slow or late can lead to

cancellation of orders and loss in sales. Suppliers sometimes even have to accept shipment dates and lead times that are difficult to achieve and risk receiving cancellations, discounts or reclamations, in case of delay.

As a result, fast fashion suppliers who are slow throughout the production and development processes cannot survive. Therefore, companies search for sources and reasons of delay and take precautions to prevent the mistakes and delays, and to improve their speed not to lose business. Furthermore, suppliers often take many actions to improve and shorten the production process and lead time and to proceed quicker. Hence, in none of the meetings attended any one was talking about how to slow down the process but instead how they can further speed it up to get more business. Consequently, it is unlikely for fast fashion brands, retailers, and suppliers who earn a lot of money from this business to slow down.

Furthermore, the speed of fast fashion requires the actors such as retailers, manufacturers, accessory and fabric suppliers, to invest in new technological developments and innovations such as new and different dye techniques, print techniques, and different machinery. Consequently, it helps new areas and new industries to develop and businesses and economy to grow (Owner, male, 57). Especially to become a supplier of leading fast fashion retailers it is important to be quick and to offer very new techniques, fabrics, styles, ideas, and trends, before anyone else. Suppliers need to keep up with the trends and constantly be innovative, which helps them to develop as well (Merchandiser, male, 35).

Personally, I can support slow fashion as I do not approve fast fashion. People buy something and not use it at all. I used to do this as well. However, I still want fast fashion to continue. If slow fashion becomes successful then I will have no business and I will not be able to earn any money (Product developer, female, 41).

If the cycle slows down and system becomes sustainable than a lot of people will lose their jobs. We will sell fewer styles but higher quality garments that will last longer with higher margins. The lead times will be longer so there will be less stress but to run this system we will need less people which mean firing people. Less production means less people (General Manager, male, 40s).

Besides, fashion industry and fast fashion system provide job opportunities and enhance economic growth and earnings. Frequent changes in trends and offering many collections also create more jobs for more people (Sales manager, female, 41; designer, female, 28). Even if under pressure and stress, most of the informants I spoke to did not want fashion to slow down because of their need for jobs. There is fear that sustainable development can lead to a slowdown in economic growth, which could result in loss of jobs and a rise in unemployment (Dolan et al. 2006). Therefore, even though some of the informants do not approve of fast fashion they prefer the system to continue for economic reasons, to secure their jobs and living. Speed is critical to be able to succeed and not to lose business.

The only motivation I have is to have enough business for all my workers; to have enough orders so that they can sew every day. If I need to work with four to six week lead times, I have to use local materials anyway. However, I cannot produce a product at the same standards with a very expensive brand in these conditions. Because my target customer is not this. My target customer is fast fashion customer and sustainability of fast fashion means to be quick and to be affordable... (Owner, male, 57).

Economic concerns were addressed in most of the meetings and interviews. Competition is getting tougher and when sales of retailers are not good this is also reflected on the orders that are placed with suppliers. To make investments and to fill production capacities suppliers need more orders. They are concerned that if they do not have enough orders they will not be able to sustain their business. Moreover, if the cycle slows down they need to lay off many workers as the business will be less (Director, male, 50s). Therefore, having enough business is critical to be able to keep all the workers, which requires being quick and affordable as the target customers are fast fashion customers (Owner, male, 57).

There is a paradox between current economy and sustainable fashion. Fashion is necessary for economy to survive and for people to find jobs...Waste may have increased by 5 percent. However, last year we employed 450-500 people and this year we became 800 people, which means providing job opportunities to 300-400

more people. I think offering employment opportunities are not proportionate to increase in carbon footprint. At least in our industry, the cut and sew section of the business, I believe that the positive effects are more than negative consequences. The situation may be different in dye houses. Employment wise we grew 30 percent this year, whereas the growth rate of Turkey is around 3.5 percent (Owner, male, 57).

A lot of discussions are made only on the environmental side, that we don't need a lot of things and that we could consume less of everything. But if we were to decrease 10 to 20 percent of everything we don't need, the result on the social and economic side would be catastrophic, including a lot of lost jobs and increase in poverty (Karl-Johan Persson, CEO of H&M, from an article by Martinko 2015).

As industries grow they have more waste. However, offering jobs and employment opportunities to many people can override the adverse effects on environment and the increase in waste. As quoted above, the CEO of fast fashion retailer H&M, Karl-Johan Persson, even stated in a post for *The Guardian* that, reducing speed of consumption would lead to loss of jobs and increase in poverty, creating a social and economic catastrophe (Martinko 2015). Therefore, buying and selling many things can be seen as necessary rather than wasteful, in order to maintain economic growth (Bergman 2000).

As a result, speed which enables economic growth and success, and can serve as means to gain competitive advantage, is also regarded a requirement to sustain business, economy, and jobs. This makes it difficult to imagine a radical change in lifestyles supporting unsustainable consumption practices (Thøgersen 2005). However, this greed for economic growth also brings with it negative consequences of fast fashion, which is addressed later on in the section but first I discuss speed of change fulfilling desire for new.

5.1.4 Speed of Change Fulfilling Desire for New

In the later part of the 20th century, the apparel industry experienced major changes in production logistics, timelines, and scale, which helped to increase output and feed shoppers' increasing desire to buy more (Gonzalez 2015). Zara is one of the main retailers responsible of the changes in fashion system. Instead of focusing on quantity, Zara manufactures only small quantities of each style. Its designers in Spain constantly create new designs of which around 12,000 are produced in a year. They

hardly have stock replenishments, which creates a "*terrible hunger*" in the consumer. Consumers fear that they will miss the opportunity to have an affordable version of a catwalk item if they do not buy quickly (Siegle 2011).

Accordingly, consumers changed their priorities in buying clothing. Instead of assessing for quality or looking at labels, they started to search for what is new. Therefore, they started to visit the stores frequently. For instance, Zara expects its customers to visit the store on average 17 times a year, whereas for a typical retailer this drops to four times a year (Siegle 2011).

Like Zara, Primark also keeps shoppers coming back to store by constantly adding new styles. Ann Marie Cregan, Primark's head of buying for womenswear, states that about 10 percent of the lines in store are new each week. Stock turn-over is six times a season compared to an average of two times for most U.S. retailers. Basic garments are produced in Asia with a lead time of about 90 days, while fast fashion items are manufactured in Turkey or Eastern Europe with a lead time of eight weeks, which allows Primark to respond to demand for popular items quickly and trade in season rather than forecasting long time in advance (Davey and Morris 2014). These strategies enabled the retailer to become successful in the past years.

...Newness and the availability of something that looks like it is different from the thing that was there few weeks before is absolutely a necessary part of retail because it is what customers have come to expect... (Business and research manager, male, 40s). (Full quote is used in introduction of the speed section.)

Informants also addressed that due to many factors such as the way we consume information; the speed with which the information is there; and the proliferation of internet sites that promote fashion, consumers now expect to see something new or at least something that looks different every few weeks. Once they start looking at something new all the time, they then feel that they should be wearing something new all the time (Business and research manager, male, 40s). Fashion satisfies this desire for new and different by changing fast (Designer, female, 30).

If all fast fashion brands are slowing down, I suppose we will get used to it in the same way we got used to fast fashion. But I really cannot imagine the result of this because the world has become very trendy in the last few years. Before, one out of 20 people was trendy but now almost nine out of ten people are trendy and follow fashion. For instance, in Barcelona I see people with different styles. The t-shirt is Zara but the trousers are from another store, combined with something second-hand. People like to be different and they like to wear special and new things. Therefore, it is difficult to have four seasons again. It means three months without buying any new items. Actually, I would like it because it will be the better for the society and environment, but it is difficult to apply it. The customers go to stores and every week there is something new. I have even seen people buying something new every day (Designer, female, 28).

Shopping habits have changed as well. People used to go shopping at the beginning of the season and bought what they needed for that season. Now they go shopping almost every week and when they see the same products they think that they are old, as they have already seen them (Research and Developer, female, 30s). Even if retailers decide to slow down the cycle, it is difficult to have four seasons again because the customers got used to seeing and buying something new every week. Therefore, it will be difficult to get used to having three months without buying any new items.

Moreover, it is difficult to encourage people to consume less and buy fewer clothes, especially when the retailers constantly offer new products and change their collections frequently (Assistant Consultant, female, 30s). Some of the informants believe that even a crisis will not be able to decrease this speed of consumption (Designer, female, 30s).

... If fashion only depended on men then we would be in trouble. This has changed as well. I used to have one pair of blue jeans, now I have 5 or 6 pairs. I definitely buy a pair every year, even if they don't get old and each is slightly different; a different wash, effect, shape, color (Owner, male, 57).

It is to do with supply and demand. Because of this speed we constantly search for new things. Before we used to go shopping at the beginning of the season and bought what we need for that season. After that we only went to stores to have a look if they

had anything new. Now we go shopping every week and when we see the same products we think that they are already old, as we have already seen them. When people expect to see new things every week, firms need to continue this cycle by offering new products at this speed to be able to survive. They need to meet this fast demand for new products. A chicken and egg situation (Research and developer, female, 30s).

Retailers need to constantly offer new products to be able to meet consumers' expectations for seeing new things every week. They have to continue this fast fashion cycle and fulfill constant demand for new products to be able to survive. If people wear the same things for a long time and if there is no constant change, the retail stores will not be able to sustain their businesses.

Fashion needs to change quickly like today. It should not be slow. Otherwise it will lose its excitement. I do not know if slow fashion will excite me. If there is something that excites me when wearing or designing then my opinion may change but according to me fashion needs to be fast (Designer, female, 30).

We want to surprise the customers. We want to have something exciting. If it's hanging the same things there all the time, it is not so exciting (Margareta van den Bosch, H&M's style adviser, from an article by Godelnik 2014).

Furthermore, some of the informants find speed of change necessary to ensure excitement. Fashion being fast and changing quickly is important for it to remain exciting. Having fewer collections can be considered boring and not as exciting as fast fashion. Similarly, Margareta van den Bosch, H&M's style adviser, told NPR that surprising the customers and excitement is an essential part of the business (Godelnik 2014). As Topshop's creative director Kate Phelan states "*it's important to celebrate individuality. Trying to look normal takes away the thrill of the new and the excitement of shopping*" (Farrell 2014). Consequently, desire for new and change was often associated with excitement.

It is difficult to change people's habits. To shift from slow to fast speed is easy but once people get used to going to stores and seeing new stuff every week it is very

difficult to do the reverse. They get used to buying something new frequently and when someone tries to stop this, it is very difficult (Designer, female, 28).

As a result, fashion is used to fulfill people's desire for new by changing fast and remaining exciting. There is such a speedy circulation of new products that as new styles are offered consumers are tempted to buy new things. Consequently, the level of consumption has been increasing as people expect to see new things in stores every week and feel the need to be shopping for something new all the time. It is difficult to change this habit and slow down the process.

5.1.5 Consequences on Welfare of Workers: Stress

Field notes, interviews, secondary data, and prior literature reveal that the speed of fast fashion and its rapid growth puts a strain on all the actors. Shorter lead times can mean overlooking unethical practices. Earlier findings highlight that unpredictable orders and unrealistic deadlines make it difficult to make production plans. Therefore, suppliers struggle to predict the number of workers needed in longer term. Consequently, fast fashion's practice of buying in irregular orders with quick deadlines, to keep up with changing trends, and to respond to fluctuating demand aggravates problems like excessive overtime and replacing full-time staff with temporary or subcontracted workers, to whom employers pay less benefit (Fletcher 2007; Cataldi et al. 2010; Abnett 2015).

One of the most important negative consequences on welfare and health of workers is stress caused by speed. The increasing supply and demand for fast fashion has created a vicious cycle necessitating designers, retailers, and manufacturers to react faster. To be successful firms need to ship in short time and send samples and answer other requests quickly. This constant requirement to act quickly to ensure economic success leads to stress and exhaustion among actors.

Delivery dates are very important. We cannot accept delays. Colors of the development samples need to be correct. Variations are not acceptable. Styles need to be authentic. We need to give that message to the customer! Finishing and quality need to be perfect. We do not want quantity of development samples. Speed not allows us to comment on all samples we receive. We wish we had the time but we do not. Therefore, items need to be perfect (Buyer, female, 40s).

Garment workers are expected to produce a huge volume of clothes in impossibly short turnaround times at the cheapest possible price (Martinko 2015). Lead times have become shorter and retailers have become more demanding. They want everything to be quick and perfect. With these kinds of demands and retailers competing to be the cheapest and quickest, all the pressure is often placed at the end of the supply chain (Noble 2014). Therefore, it is stressful and tiring for people who work in the industry. Informants also often complained about stress and lack of time.

Everything changes quickly and demanded very fast. The customers have become too demanding. It is impossible to prioritize customer requests as everything has become urgent. Most popular and common phrases repeated in field notes and interviews were "*I request urgently, within today, asap...*" Sometimes, it is not even possible to make an action plan as additional urgent requests keep arriving from the customers. At the end, it becomes impossible to distinguish or prioritize.

Slow meant 6 months lead time in old days. We knew what we will ship and make in advance. Now there is no time even to make a weekly plan (Manager of the sampling room, female, 40s).

Speed of the fast fashion system also brings about uncertainty. Uncertainty on retail side leads retailers to demand short lead times, which creates uncertainty on the production side, as both retailers and producers do not know what they will sell in the next couple of months. It has become more difficult to guess and plan what the customers will like and buy. The uncertainty caused by speed enhances the stress of the actors on the institutional side and it is one of the main reasons behind conflicts, as no one can foresee or plan the future.

I think that the main reason behind stress is speed. Before, when lead times were three-four months, no one used to fight with each other this much. Once a week, we used to have calm meetings. We placed orders for fabrics of garments to be shipped three months later. If it arrived in three weeks instead of two, it would not be a problem. Week delays were not as important. Today, as we need to do everything so quickly, everyone is arguing with each other. Instead of waiting for an approval, to

save time, people take initiatives and risk making wrong decisions. This results in major problems. Before we took time to make the samples, so they were correct and if it was not approved there was time to resend. If fabric was wrong there was time to repair the fabric. Now there is no time to make even one tiny mistake or time for anything to go wrong. As it is so fast, everything needs to be perfect and correct but this is not realistic. There are always mistakes or problems in this business (Merchandiser, male, 42).

Short lead times and requirement to do everything urgently also increases tension and conflicts among actors. In old days, there were not this many arguments between people as the lead times were longer. Today, people need to work against time. Moreover, there are many potential problems that can affect the shipment date and lead time in fashion and even a tiny problem causes a delay in shipment. Any delay is devastating for every partner along the supply chain (Hertzman 2014). There is often no time to fix the mistakes. Therefore, everything needs to be correct, which is not realistic. Consequently, the need to do everything perfect and quickly aggravates the arguments between actors.

Economic concerns are often the reason behind stress. For instance, the main concern of the owners of the companies is often to earn more money. To this end, they put pressure on the sales and design team to receive more orders. However, if the development samples are not on time and if they are not perfect in design and make-up, it is very difficult to get orders. Consequently, the employees are under stress and pressure most of the time to fulfill the requirements of both the company owners and the customers (Designer, female, 28).

...They are very difficult especially at development stage. It is necessary to impress them with many samples and to send the samples very quickly. We all know that their expectations are very high and it is difficult to impress them. Everyone is trying to sell to them, so they do not care much about the suppliers. In total we made around 100 samples for them in the last couple of weeks and all were urgent. This is always the case with them. They request a lot of samples and all are urgent and it is always very stressful (Merchandiser, male, 35).

Some fast fashion retailers put a lot of pressure on both the designers and the manufacturers, even during development process. Interviews and meeting notes reveal that the amount of development samples that the retailers demand from the suppliers and the speed that they require them at can be very challenging and stressful. Some can even request around 60 styles to be sent in two weeks. Considering that most of the retailers' demands are urgent, the development stage has also become very stressful for the suppliers. Speed is critical to be able to succeed. However, necessity to put up with this speed often causes stress and this stress and pressure often ends up in arguments between designers, merchandisers, and the sampling department.

We have to argue and fight with production every day because fabric has not arrived or something else has not happened on time. There is a lot of stress that fast fashion creates. It needs to be quick, correct, fast, and cheap. These pressures that fast fashion creates result in people arguing with each other all the time and blaming each other for the mistakes (Merchandiser, male, 42).

There are disputes between departments. Marketing is always in conflict with manufacturing. This is natural and occurs in every business. As marketing and sales people, we may need to lie sometimes to be able to sell. However, the production conditions are different. There are many variables. If thread is one day late, fabric is delayed by three days and production is late one week which automatically affects the lead time (Sales manager, female, 41).

Moreover, textile industry is a very big industry with a big supply chain including many different actors. Hardly anyone works independently. Manufacturers, fabric suppliers, accessory suppliers, designers, merchandisers, retailers, all need to work in cooperation with each other. During this process there can be many problems to encounter as there are many unpredictable factors and variables in textile production, such as procurement of fabric, materials, and accessories, which make it difficult to keep up with the short lead times. These uncontrollable or unforeseen variables add up to the pressures of the business and result in problems and conflicts between actors.

There are conflicts between departments as well. For instance, the marketing department can make an unrealistic or too optimistic promise to the customer and expect production to meet this deadline. However, it is not easy to keep these promises mostly due to speed and uncertainty of the business. Sometimes the dispute is with the retailers about price, quality, or shipment. Sometimes it is with the production department about lead time, quality of product, or costs. Therefore, the actors working in the industry often complained that even if they like their job and enjoy following fashion, it is often very stressful.

There are many factors causing stress. Customers may want to make changes on products after placing an order because they can't be sure. This means stopping production and starting from the beginning and doing everything again, which is very stressful and tiring. Moreover, they do not want the suppliers to delay the shipment. This is the most stressful issue in production, which is my biggest problem. We need to send pre-production samples with bulk fabric before starting production. The customer can even make changes on that sample. Fabric arrives in three weeks. Production takes one and a half weeks. This leaves two-three days for approvals. We are constantly under stress. We may need to take initiative and start production instead of waiting for approvals but this is taking a risk because there may be things that they don't approve. Shipment date may also be delayed because of problems in our own system. We may face important problems in purchasing fabric and accessories, such as quality. Print can have formaldehyde so we have to carry out tests. There are many potential problems and everything can affect the lead time in fast fashion. If we can't ship on time than we have problems with the customer. We need to be fast and well-programmed to get orders. We are now trying to establish a system to make risk analysis in order to foresee the possible problems and to take precautions but this is not always possible. There are always these ups and downs in textiles and it becomes very stressful (Merchandiser, male, 35).

Brands not submitting approvals on time or making last minute changes to product aggravates the problems and makes the process harder (Hertzman 2014). The retailers are often not aware of the importance of sending approvals quickly. Moreover, they make changes; they do not allow the suppliers enough time to get approvals; and they still do not want to delay the shipment. Meeting notes also show

that there are often conflicts and arguments between retailers and suppliers due to shipment delays.

Delayed shipments lead to commercial losses for retailers as the merchandise cannot be in store at planned time. Therefore, retailers often ask suppliers to compensate for loss in sales, even when they are responsible for delaying the shipment by approving something late. Some retailers cancel some of the quantity to prevent over stocking. Others ask for reclamation for delays. This can be 5 percent discount for one week delay; up to 25 percent discount for two weeks delay; and when the delay is more than two weeks order can be cancelled. Moreover, when one order is delayed it affects the other orders as well and the whole production schedule is affected. Therefore, it is critical to be fast and well-programmed to be able to foresee the problems and take precautions, which is not possible all the time.

We need to be fast but we got used to this. If we receive fabric and accessories on time, we have enough capacity, and we will not have problems with the lead time. However, everything is urgent and every time it is a new project, a different fabric is used for each new order and each time we have a problem with the fabric. These problems affect the lead times and in order to ship on time we have to work overtime. Overtime increases the costs and it may become a problem due to code of conduct requirements. Therefore, making people work overtime can be problematic. It needs to be within allowed limits. Customers do not understand this. When they are late in giving us the approvals we have problems keeping the same lead times. They think that once they give an approval, we can ship it the next day as if we are printing t-shirts in a photocopy machine (Owner, male, 57).

Furthermore, when the approvals are given late, in order to ship on time, the workers often have to work overtime which increases the overhead costs. Manufacturers also need to keep the overtime within acceptable limits of code of conduct requirements. It is hard to explain these to the retailers, as they want everything they need, exactly as they require, on the date they asked for. They do not understand the problems that the suppliers have to deal with or the factors that they cannot control such as fabric lead time (Designer, female, 28; Owner, male, 57). Having strict code of conduct procedures and requirements to conform to these

standards can slow down the speed. Therefore, it is difficult for suppliers to meet all these demands within expected lead times. If retailers require 4 to 5 weeks lead times they need to trust the producer and the producer needs to guarantee that they will handle the production in the best way (Merchandiser, male, 35).

One of the leading retailers we work with has strict rules for its suppliers. If it is an urgent issue related to a fast order, the suppliers need to reply back to an inquiry within four hours upon receipt of request. If it is a normal issue and a request, suppliers need to reply back in 24 hours. Every supplier has a score chart, based on which they are evaluated every year. If the suppliers do not meet these deadlines, then they lose points on their score chart. It is very stressful to work like this as it is not always possible to reply back to an inquiry within 4 to 24 hours (Owner, male, 57).

There are many other examples of stress and conflict, mainly due to working under time pressure. Due to working against time it is not possible to risk assess all the developments, which can lead to problems in production. At the end, suppliers often have to bear the costs of high speed. However, it is also inevitable for them to be quick if they are working for fast fashion retailers. Some of the big fast fashion retailers even evaluate suppliers every year based on their speed in replying back to inquiries and on performance for on time delivery.

We set up our supply chain for our brand values...We've just said, our approach to ethics is our approach to ethics, we can't deviate from that (Krishan Hundal, responsible from ethical sourcing at M&S, from an article by Abnett 2015).

Some businesses are much more "fast fashion" than others. For instance, there is discrepancy in speed between M&S and other high street chains. M&S, which targets a relatively older consumer, adds new products to stores every four to six weeks; whereas H&M and Topshop launch new items at least once a week. Krishan Hundal, who is responsible for ethical sourcing at Marks & Spencer, addresses that operating without forward planning can make things difficult for suppliers. He states that their approach to ethics is beyond argument and speeding up production cannot

change their ethical policies (Abnett 2015). When planning starts earlier, it leaves more time for suppliers to develop and produce, which means there will be less stress.

It does not look like things are becoming better. Instead, it is becoming more uncertain and difficult every day. I cannot see the future anymore, neither can I say that it will be a better one. I need to have a lower price than the competitors to be able to survive. I need to have an order for 50,000 pieces everyday to be able to sustain my business. I make 100 samples everyday and ship in four weeks for almost all the orders. We need to be very organized and coordinated as even one day delay can result in big loss in sales and profits (Marketing Manager and Director, male, 50s).

We have a difficult period this year. Sales are not really well and competition is very aggressive. Sales period started early. Normally we could plan in advance but now fashion and trends are changing so fast that we can't plan in advance as we are not sure what will sell (Buyer, female, 40s).

According to most of the informants, the business is not likely to get any easier in the future, as the industry is becoming more uncertain and difficult. Suppliers need to be quick; have low prices; and make a lot of development samples to be able to get orders. It is not any easier on the retail side. The fierce competition and the difficulty to plan due to uncertainty and speed of change are among the main difficulties.

I miss my old job. We only placed orders four times a year. Our lead times were three to four months. We had time for everything. We made good money as well. But then I got bored and quit as everything was the same. There was no excitement. Now I work with a retailer which is very demanding. They want a new collection and something new every five or six weeks. Their lead times are short as well. They change everything at the last minute and they do not accept any delays in shipment. It is not even logical. There is a time and action plan. We do not have any built in extra days. If anything changes there is bound to be a delay. I really hate them sometimes! (Merchandiser, female, 32).

Even though some of the informants like this speed and find it exciting, they still complain that they have a lot of things to do but not enough time to get them done. They are often stressed due to time pressure (Designer, female, 30). Some have conflicting feelings. Having fewer collections can be considered as boring and not as exciting as fast fashion but on the other hand, fast fashion has become very stressful and difficult to cope with.

Of course if everything did not have to be this quick we would have more time to prepare better samples for the customer. Unfortunately this is not our case. I wish it was slower but it is not. We need to adapt to this speed (Designer, female, 28).

I do not see the possibility of a new system in the world. Of course I would like to go back to the old system. If fashion cycle is slower like in old days everything will be more predictable and less stressful. 15 years ago they phoned from Germany to place an order for 100000 pieces of polo shirts that was same as the one we produced a year ago. They had the previous order in white, red, and black. They placed an additional order for 50000 pieces in green. They did not even have any fit samples. We just carried on with production and shipped. There were no controls. Those times were good (Merchandiser, male, 42).

Considering the stress dimension of the business, it is not a sustainable business model, especially for the ones who work in the industry. Most of the informants expressed their desire for the system to be slower so that they can work in a more efficient way. Some even wished to go back to the old system, as it was easier, more predictable, and much more relaxed. Today, the suppliers do not even know what they will ship or sell next month. In old days, they used to know and plan what they will produce and ship in the next six months. Even if the colors changed there were couple of basic fabric qualities. Manufacturers kept stock of those fabrics in raw and dyed them in requested colors. They used to plan all this with the retailers and did not face as many problems.

There are even examples of actors who left the industry due to speed. For instance, a well-known Dutch designer (reserved anonymous for confidentiality), who attended a workshop organized by Istanbul Moda Academy, in 2012, stopped working as a designer, as she was tired of the production and consumption speed of

the fast fashion system. She became a lecturer at an Institute of Fashion and started supporting slow fashion practices. She works together with local people from different countries.

Another informant also stated that she was much stressed and not happy when she was working with fast fashion retailers and suppliers. Now she has her own studio and is working as part of the fashion incubator. She does not earn as much but she is much happier. The Academic Coordinator of a design school also indicated that if the system continues with this speed, there will eventually be a saturation point in textiles. Everyone will be exhausted and worn out from this cycle. People may be fed up with this stress and ask for it to stop.

Fast fashion promotes consumption but it needs to continue for economic reasons. It needs to continue, as we all earn our living from this business. I am not sure how it will change or if it is possible to go back to the old pace. However, I would like to go back to the old pace because I do not even know what I will ship or sell next month anymore. Before, I used to have orders to be shipped in the next six months. This uncertainty leads to stress and it is the main source of all the conflicts as no one can see, predict, or plan the future. The retailers do not know if they are buying the right products so they are cautious when placing the orders. They want to work with short lead times and place repeat orders for the best sellers. As a result, everyone is under pressure and stressed out but will the system change? I do not think so (Sales manager, female, 41).

As a result, working in these conditions has negative outcomes on welfare of workers and is stressful for most of the actors working on the institutional side. It's a tough way to do business considering that many factories are already working on thin margins and extreme deadlines. However, according to most of the informants, it is not likely for the system to change or slow down, mainly due to economic reasons, as many people earn their living from the business. Therefore, the actors often feel the pressure and the necessity to adapt to this speed.

5.1.6 Consequences on Environment: Waste

Fast fashion isn't really about speed, but greed; selling more and making more money. Time is just one factor of production, along with labor, capital, and natural

resources that get juggled and squeezed in the pursuit of maximum profits. But fast is not free. Short lead times and cheap clothes are only made possible by exploitation of labor and natural resources (Kate Fletcher, eco-textiles consultant, from an article by Styles 2015).

The current speed of the fashion system also brings about negative consequences on the environment and natural resources, as highlighted in literature, press, and field notes. Shorter lead times often mean ignoring unethical practices and increasing the need for air transport, polluting the environment (Styles 2015). According to Greenpeace, around 80 billion garments are produced worldwide, which equals to over 11 garments a year per person. The immense volume of clothing being made, sold, and disposed of increases the human and environmental costs of our clothes. A campaigner at Greenpeace East Asia states that as fashion gets faster and more globalized, more consumers worldwide become fashion's victims and contribute to industry's pollution (Chua November 21, 2012).

Mass-market fashion retailers today create and waste trends very quickly. Rapid release of products encourages constant shopping and trend chasing (Cline 2012). As a result of speedy and continual changing of styles, clothes quickly lose their appeal, become out-of-fashion, and are disposed of very fast. Trendy clothing adapted from catwalks to retail floors at rapid speed is tempting for many people, who no longer have to wear the same outfit many times. However, the volume of discarded but still wearable items illustrates that people view clothing as disposable (Boboltz 2014).

Buying something very trendy that we know we will only wear for a short time that season and never again is real fast fashion. This is not something good, considering the situation of the world today (Product Developer, female, 41).

I always think that fashion is changing very fast. We can buy something and next year it is not trendy. I do not mind if I really like it but a lot of people following fashion, they throw it away and buy new things. Maybe after five months it becomes old. I do not like this side of fashion. I think it is a big waste (Designer, female, 28).

Similarly, informants also addressed that people got used to buying new things frequently and throwing them away quickly without considering the consequences. However, consuming and throwing away things so quickly have serious implications on the environment and finite resources. Some of the informants criticized the rate of consumption and throw-away mentality in fashion industry. Others considered it a big waste. However, despite all the criticisms, throw away fashion has become more common.

The negative outcomes of fast consumption and production were also addressed in some of the seminars and workshops attended. It was stated in a supplier workshop that people consume more when fashion changes quickly. Similarly, in another seminar it was addressed that if fashion consumption and production keeps increasing at the current rate, the impact on social and ecological environment will increase, making it more difficult for the industry to handle and resolve these issues.

Furthermore, most of the informants addressed that the garments are no longer durable. The products are specifically made with bad quality fabrics so that they become old very quickly and are thrown away after three months. People immediately buy new clothes leading to a speedy circulation of products. As a result, more is produced and consumed and more resources are used and exhausted, deteriorating and polluting the environment.

...We may think that there is still time. We are fine for now and it will happen in the future. It will not happen to us. However, they say that things are changing so quickly, environmental crisis will happen very soon (Freelance designer, female, 32).

If the fashion system continues at this speed, there will soon be an ecological crisis as the world's resources are finite. The root cause of the problems is using too many resources and the planet cannot sustain or afford this level of consumption as it will eventually lead to resource scarcity (Business and research manager, male, 40s). Therefore, sustainability consultants and some of the designers interviewed invite people to become more sustainable and more cautious.

People will soon learn their lesson as there is no such luxury as buying and throwing away so quickly. Environment cannot sustain this. This awareness may not happen soon but it will happen eventually. We have no right to use things once and consume things with short lives and throw them away. We need to consider carbon footprint... (Freelance Designer, female, 32). (Rest of the quote is at affordability section.)

If companies build things that last, customers need to buy less of them and we deplete fewer natural resources....We are facing an ecological disaster and if we continue this idea of fast fashion and throwing away products, not recycling, and not taking care of the environment, we are not going to have a planet to live on (Rose Marcario, CEO of Patagonia, from an article by Godelnik 2014).

People need to gain awareness and consider carbon footprint of their purchases. Rose Marcario, Patagonia's new CEO, in an interview with *The Guardian* also drew attention to negative consequences of speed and the danger of facing an ecological disaster if we continue with the fast fashion philosophy and throwing away products. He suggested producing and consuming less of durable products that last longer as opposed to throw away fast fashion items (Goldenik 2014).

Fast fashion's effect on the environment is not good. As people continuously buy new clothes manufacturers need to produce more. Producing more and consuming these quickly means throwing away more goods, which creates a waste problem. Consuming and throwing away everything quickly means wasting. Therefore, fast fashion is a waste (Merchandiser, male, 41).

Over consumption and over production of textiles also leads to increase in textile waste, which is in line with earlier findings (Morgan and Birtwistle 2009). Fast fashion is a driving force in modern consumer culture, which urges people to buy more clothing. Inevitably, loads of clothes are thrown or given away. For instance, in US more than 10.5 million tons of clothes end up in landfills every year. It is not even easy to break down the natural fibers. Therefore, replacing cotton with organic cotton is not a solution as well (Bain 2015).

According to the Environmental Protection Agency, only about 15 percent of the 13 million tons of clothing and other textiles that are thrown away each year are recycled, turned into products, or broken down to be reused as sustainable fibers. The

carbon produced in making that 15 percent, is a drop in the ocean compared to the amount of carbon generated in the production of the other 11 million tons of clothes that are bought, worn, and disposed in the landfill (C. A. Lee 2014).

Some of the informants also addressed the increase in carbon footprint and waste in textiles. On the other hand, the owner of a supplier while admitting that there are adverse effects on the environment, also stated that compared to most industries, textiles, at least the manufacturing side, is cleaner (Owner, male, 57). However, production of waste in fashion industry is still an important issue and it has started to be discussed in academia and by some institutions. For instance, "*Sustainable Approach to Textile Waste*" was one of the topics discussed at the International Art and Design Congress held at DEU Faculty of Fine Arts in Izmir, in 2014. As a result, fast fashion's consequences on the environment and finite resources cannot be ignored.

5.1.7 Consequences on Wellbeing of Society

There are also societal consequences resulting from speed of fast fashion system, such as increase in materialism and promoting unnecessary consumption. Image has become the most important thing. People started to consume to impress others and to buy social status. In this respect, fashion is used as a tool, as it changes very fast and urges people to buy new things by offering minor changes all the time (Sales manager, female, 41).

They established a system to promote people to spend more. Before style of a car used to change every six years and manufacturers used to manufacture and sell the same style for six years. Now it changes every year. Same thing is valid for textiles. Trends used to change once every two years. Now trends change every three months. Everything is changing faster, not only textiles. Cars, furniture's, phones...The companies change everything quickly to make people buy new things. This is fast fashion (Merchandise, male, 42).

Fashion needs to be fast but there is a lot of unnecessary consumption. Especially young people have become too materialistic. They consume to impress others. This fast and unnecessary consumption also leads to deterioration and waste of resources. However, the society wants to consume and I do not know if this will

change or can be changed. It is not only textiles and fashion; everything from furniture to cars, accessories to food is consumed fast (Designer, female, 30).

Things we buy and wear lose its appeal and styles become old very quickly. It is not only in textiles but in all areas, companies change everything quickly to make people buy new things. Media plays an important role in promoting this fast consumption. Consequently, people feel pressured to buy more. It leads especially the young ones to become more superficial, brand-oriented, and materialistic (Designer, female, 28).

Fast fashion is a system that is created to rob people. It is a system that prompts people to consume in order to earn more money, which creates psychological problems by making people feel pressured to buy more (Merchandise, male, 42).

Fast fashion encourages people to follow unrealistic dreams. What makes people really happy is the relations they have with other people but people try to find happiness in new phones or in new clothes. This actually makes the society unhappy and no one attempts to change this as the capitalist system established by big capital owners continues to dominate the world (Merchandiser, male, 42).

Furthermore, on the consumption side, people are also getting exhausted from speed of change. It is stressful and tiring for consumers to be under pressure to keep up with the fashion trends all the time. There is such a speedy circulation of products that as new things are offered people feel obliged to consume more (Assistant consultant, male 30s). Moreover, people are shopping using credit cards, borrowing from their future earnings. If the system continues like this, eventually it will create serious problems in people's lives (Merchandiser, male, 42).

... the reality is that there is a huge stress pressure on the manufacturer; there is a huge stress pressure on the retailers; and there is a huge stress pressure on the consumer because when we talk to consumers we find out that the level of consumption that people are engaging in isn't making them happy. It is not generating happiness, it is actually generating dissatisfaction. There is quiet good research out there that shows that the use of consumption as a way to satisfy dissatisfaction is not working. It creates the opposite. It actually means people feel

like they are chasing some sort of an idea or a dream that they can never capture. They are buying things; taking them home; they don't fit, they are not right. Therefore, the level of returns with retailers is just going up, especially with online retailers, because people are buying but they do not actually like what they are buying. They are just buying for the buzz of buying and then taking that stuff back. Now many of the retailers are trying to find new policies to stop people doing that. When we look at the bigger picture, we see that it is not functional. So we know that ultimately, at some point, it will start to self implode but a lot of people have invested interest in stopping that happening (Business and research manager, male, 40s).

Moreover, the level of consumption that people are engaging in isn't making them happy. It is actually generating dissatisfaction. Research also shows that using consumption to feel better is not working anymore. One of the indications is the increase in level of returns because people do not like what they buy. They are just buying for the buzz of buying and then taking those items back to the stores. Many of the retailers are trying to find policies to control the returns.

The current fast fashion business model is the problem. It has been successful in getting people to buy and then throw out clothes. But that's not what fashion is about (Dily Williams, director of Centre for Sustainable Fashion, from an article by M. Lee 2011).

Similarly, Dily Williams, the director of Centre for Sustainable Fashion, criticizes the current model based on fast consumption and throw away fashion; and considers this fast model as the real problem (M. Lee 2011). The level of consumption in emerging markets is increasing as well, along with speed of growth of population and wealth. The planet actually cannot sustain this level of consumption. We can come up with new ways of consuming more but we cannot afford the level of constant consumption that we are currently engaging in. There needs to be a cutoff point (Business and research manager, male, 40s.)

Therefore, individuals, especially in Western industrial countries, want to slow down and have more time to enjoy life (Lasn 1999). There are consumers who want less choice in their consumption decisions. They want to consume less, as in the case of slow movement, for environmental reasons or because of economic

circumstances. Many consumers who have been forced to consume less because of economic factors have become happier as they have a less pressured lifestyle and spend more time with their families and friends. Hence, many started to realize that choice and increased consumption do not necessarily increase happiness and/or improve quality of life (Prothero et al. 2010).

5.1.8 Lack of Uniqueness, Originality, and Value

Elizabeth Cline, in her book *Overdressed: The Shockingly High Cost of Cheap Fashion*, states that fashion feels arbitrary and pointless now due to the madness in speed of fast fashion. My findings partly support this argument. For some of the informants, fashion that is consumed so quickly cannot be considered as "real fashion."

When it was not this fast, fashion was really something that people see on catwalks or something that people buy from a good brand and care for at least for six months. Now it loses its appeal in two weeks because it gets old as people get tired of seeing it everywhere. Last month it was in Zara, three weeks ago in another store and so on. Nothing gives pleasure anymore. This is not good and it is boring as well. People see the same things in every store they go. Everyone copies each other and offers it in its store in a quick way. Eventually, all the stores look alike (Sales manager, female, 41).

Fashion serves as a tool of consumption because even if fashion and trends repeat themselves, firms still come up with new things or offer minor changes to avoid people from getting bored and to urge them to buy new things. However, trends used to remain in fashion for a longer period before. Items purchased were more precious and remained valuable for a longer time. Now, things that people buy or fashion trends lose their appeal within weeks as they are copied and recopied. Therefore, fashion lost its zest and appeal. It lost its excitement and has become boring because same or similar items are in every high street store. Consequently, stores look alike and people look alike, as everyone copies each other.

Everything is changing so quickly that fashion started to repeat itself. Designers can get stuck and may not be able to come up with new and original designs due to speed of change. Despite the constant change of products in stores,

especially after the 1990s, there are no longer distinctive and long lasting trends or fashion statements. Every year the same or similar trends are offered with little changes. Trends started to influence each other. In 1920s, 60s or 80s, styles, fabrics, shapes differed from each other. These were iconic eras for fashion. They represent a certain shape, a look, or a style. After the 90s it has become difficult to categorize fashion (Designer, female, 30).

We will not be talking about the fashion of 2010s! When we look at fashion's history, we can classify fashion and trends until the 1990s. After that, it becomes difficult to categorize fashion. 2000s, 2010s have specific features and trends but it has become too complex. They have influences from 90s, 60s, 20s. There are no longer long-lasting single trends like before. Trends and themes repeat frequently with minor changes. For instance by changing color. There is no longer one indicative or determinant trend. Until 1940s silhouette was not the identifier. After 1940s silhouettes and shapes of clothes became very determinative. With Dior's 1950s new look, everyone started to follow that silhouette and that silhouette became the mile stone of that period. We can see the effect of this silhouette in all the designs of the time. Now there is no such distinction. These distinctive trends dominated in 50s, 60s, and 70s. People used to own precious garments that they valued. For instance, in 1970s my mom had a jacket that was made by one of the most famous tailors of the time. We no longer have that understanding of quality. Maybe some designer brands still have but not as before. For instance, Ermonio Zegna brand makes fast fashion that caters to upper-middle class but at the same time they also make completely tailored garments. Maybe the characteristic of this period is this complexity and differentiation of the customers. They no longer want to look standard. They want to express themselves differently. They want to look different. At one time being blonde was the trend than it was red hair, now it is not common to have one strong trend. Fashion becoming affordable can have an impact on this. We have subscription for Stylesite website and we also buy Nelly Rodi magazines. Everyone comes here to look at these to follow fashion and trends (Academic director, female, 41).

In the future, when we talk about 2010s, there will not be one big trend. Before the time scale was wide. The trends that we considered for the 80s now we

use it all in one season. The next season it will be the 40s fashion. Versions of these iconic trends are used in shorter periods. Everything changes so fast that people see everything every season. The priorities or dominating trends may differ but they all exist and as there are changes every season, when we ask the trend of the last two seasons no one can remember a particular trend (Research and developer, female, 30s). Furthermore, due to speed of change, people no longer own precious garments that they value. Therefore, the characteristic of this period can be complexity, rather than uniqueness, originality, or value. People today have little connection to the things they use, how it was made, where it came from as it has become so easy to throw away and consume.

5.1.9 Increase in Overstocks

Typically the fashion industry has been "buy now, buy quickly, buy in season," and toward the middle of the season it is all about sales and discounts. Then we see the next season is stocked in store about four months ahead of the weather changing. It is a very fast cycle (Owner of a boutique, from an article by Donatelli 2014).

The meetings attended show that the current system based on speed is not working for all the retailers. Recently, the fast cycle of the fashion system started to give warning signals. Retailers have to change stock so frequently that there is not enough time for the goods to be sold before new goods arrive. Therefore, they started to have sales and discounts towards the middle of the season to get rid of the accumulated stock. The goods for next season arrive in store couple of months ahead of the weather changing, which does not help with the sales as well (Donatelli 2014).

Even Zara, which is one of the most successful fast fashion retailers started to have longer sales periods and more left over stock offered during the sale. Previously, they only had a small section allocated for sales. They did not have much merchandise left and sales only lasted for few weeks. It was observed that last couple of seasons they had a lot of merchandise left and sales lasted over a month. Other retailers try to solve this problem of overstock by having promotion corners. When they have new arrivals they sell the left over merchandise from previous collections in these corners. For the first time in autumn winter 2014/2015, Zara started to have small promotion corners to get rid of the stock as well.

We started fast fashion two years ago. We have a new collection in store every four weeks. We have seen that within the retail system this is too much as there is too much left over products and there is no room in stores. The system is not working for us. We are not a fashion store. Our new strategy is to have new styles every eight weeks and buy fewer collections but in bigger quantities. There will be fewer developments. Design is still important. Our input will be in promotional styles. We aim to grow in fashion basics as we do not have space for high fashion in our stores. There will be no more fast fashion for us (Buyer, female, 40s).

The problem of overstock, mainly due to the increasing speed of the fashion cycle, was also addressed in meetings with other retailers. Having a new collection even every eight weeks is too frequent for some. They end up with over stock. Therefore, some are thinking of changing their buying strategy to have less options and more volume, to be able to negotiate on a cheaper price. However, more volume and cheaper prices have negative consequences as well. Others try to improve product planning, purchasing, and shipment plans to avoid and resolve the problem of overstock.

5.1.10 Summary of Conflicting Perspectives on Speed

To summarize, there are conflicting views on speed, which is one of the main characteristics of the current fashion system and an inevitable part of the contemporary consumer culture. In meetings and interviews, fast fashion system based on speed was related to economic growth and success; and fulfillment of desire for new.

Speed of availability and quick lead times have become an asset and a marketing tool for fashion suppliers and retailers, which enable them to generate more business. Speed is especially critical for Turkish suppliers to increase and sustain their business, because Turkey is often considered for orders with short lead times. Speed of consumption and production also provides job opportunities; enhances earnings; and enables new industries to develop and economy to grow. Furthermore, speedy circulation of new products and rapid response to fashion trends help to fulfill desire for new. These outcomes of speed are likely to become barriers in emergence and mobilization of a sustainable fashion market.

On the other hand, the immense speed of the fashion system and the overconsumption and overproduction have negative outcomes on the environment, natural resources, society, and workers. Among these, stress, uncertainty, and exhaustion are the most striking outcomes, followed by conflicts between actors; waste and disposability; lack of value and uniqueness; and overstock. These outcomes of speed are likely to become driving factors in emergence of a sustainable fashion market.

Developmental rationalization often justifies unethical behaviors of corporations in return for macro level economic development. However, economic rationalization can override ethical beliefs (Eckhardt et al. 2010). Similarly, in fashion greed for economic growth and desire for new often takes precedence over sustainability goals.

However, speedy growth of fast fashion retailers requires a staggering amount of resources. For instance, H&M manufactures at least 600 million items each year; operates more than 3,200 stores in 55 countries; and expands its locations by 10 to 15 percent every year. Even if retailers like H&M try to lessen their environmental footprint, the business continues to grow and the consequences are far from sustainable (Bain 2015). Furthermore, speed of fast fashion and its rapid growth puts a strain on all the actors, causing stress, exhaustion and conflicts. Therefore, it is important to acknowledge the negative implications of the speedy growth of fast fashion along with its positive outcomes, which is influential in emergence of the new market.

5.2 Affordability

The phrase "fast fashion" refers to low-cost clothing collections that mimic current luxury fashion trends (Joy et. al 2012, p.273).

Analysis of the findings and review of literature reveal that along with speed, being affordable is another very important characteristic of the current fashion system. Most fast fashion retailers today want quick lead times, good design, and perfect styles but at affordable prices. In most of the meetings attended, retailers stressed the importance of price. They want everything to be perfect, quick, and affordable.

We need to be ambitious. We need to be like a boutique; have a boutique look and a boutique quality but at affordable prices. Price is very important (Buyer of one of the leading fast fashion retailers, female, 40s).

Similarly, in most of the interviews and conversations, fashion, especially the current fast fashion system, was related to availability of cheap clothing. Fast fashion brands and retailers stand for quick, available, and cheap clothing. Consequently, the two important characteristics of the current fast fashion system -speed and affordability- are closely related. Fast fashion needs to be cheaper so that it is consumed and replaced by something new quickly.

...The aim of the fast fashion brands and retailers is for the consumer to see a lot of stuff that they can buy at a price that allows them to buy it regularly and constantly... (Business and Research Manager, Male, 40s). (Full quote is used in section on "Social Implications of Affordability: Undermining Value.")

Consequently, the aim of fast fashion brands and retailers today is to constantly offer affordable styles so that the consumers can buy something regularly. To sustain their business at a competitive marketplace, characterized by intense pressure to generate profits and a desire for constant newness, the fashion retailers and suppliers have to produce more products, faster, and at lower costs. To be able to offer cheaper prices, many fashion companies have to shift production to markets with low labor costs and limited protections for workers' rights because most consumers continue to buy cheap products without thinking of the consequences (Hertzman 2015).

Similar to speed, affordability has both positive and negative outcomes. Affordability of the system enables accessibility, diffusion, and democratization of fashion; and delivers economic growth and success. On the other hand, current fast fashion system based on availability of cheap clothing has negative consequences on workers, society, and environment, such as leading to stress; increasing waste and disposability; and decreasing quality and value of clothing. Both the positive and negative outcomes of affordability are examined in the next sections. However, first I

discuss the importance of affordability, price, and economic factors as part of consumer culture, and role of affordability for the Turkish market.

5.2.1 Affordability as part of Consumer Culture

Both meeting and field notes show that price is often the most important criteria for consumers, especially when they have a limited budget. Economic factors may lead to buying less and buying less frequently but people still continue to buy and it is hard to change this consumption culture. Instead of purchasing timeless, well-made pieces, consumers prefer to buy cheaper and low-quality items (Noble 2014). Besides, customers who wish to get fashionable items at affordable prices most often do not care if retailers are working according to ethical and safety standards.

People get satisfied by buying something new. This is how Primark can do business. People have the desire to shop; spend money for themselves; and satisfy this desire once a week, if not once every two weeks, or once a month. I cannot say the same thing for more expensive stores. People cannot find the same thing three days later in Zara. It has been consumed already. However, when they go to All Saints, which is three times or more expensive, they can see the same things even after three months. Fast fashion needs to be cheaper. It needs to be consumed and replaced by something new quickly. This is the mentality of fast fashion retailers. I do not know what people do with very trendy items that they buy that season. Do they wear it next year? What do they do with them? I assume when they like something they buy it even if they know that they will not be able to wear it the next season. This is real fast fashion. I will wear it this summer and not wear it after that. Considering the circumstances of the world today I do not think this is something necessary (Product developer, female, 41).

Desire for new is one of the most important driving forces behind fashion consumption, which is about acquisition and quick disposal of goods (Priest 2005; Rojek 2005). People get satisfied by buying something new and fast fashion retailers fulfill this desire to shop by offering new items constantly at cheap prices. It can be fulfilling to buy something expensive or above one's budget. However, it is often the cheaper items that are consumed and replaced by something new quickly.

If I have more money I would buy more. It is in the nature of a person to buy something new and to look different. It is not only for the one who wears it. It is also for the people around them. I like to see my wife wearing something different. People also get bored after they wear the same thing for two months and they want to buy something new. Retailers use this psychology to sell more. There are maybe no big changes in fashion but they make little changes on old styles to make people buy new things (Merchandiser, male, 42).

Some of the informants also talked about people's desire for new and aspiration to shop for more. Changing the clothes one wears and dressing up in different garments takes away the boredom and brings excitement. To fulfill this desire for new, fashion institutions offer new collections and styles continuously at affordable prices, which promotes consumption.

Fast fashion will definitely continue in the future as well. It is not possible to stop it. If there is a big crisis and people will start buying bread with a card, only then fast fashion can stop. Otherwise, it is not possible to stop people from shopping for more. Economic factors can slow down the pace but it is not possible to stop and expect everyone to have that mentality. If it was this easy then many social projects would have become successful. It is not even enough for people to be aware of the consequences. We can give one of the cheapest fast fashion retailers as an example. It is on the news every six months for employing child labor in India, for factory collapse and so on. When they interview people, they state that they are very upset about the events but there is nothing they can do as they earn this much and therefore they can only pay this much. This is what they can afford and that is why they have to buy these products. They do not say that let me pay a bit more and buy less items instead. I do not think they will ever say that. Only if all retailers come together and take a shared decision to slow down but this is not likely as well. As long as people have money it is not possible. There will always be the need to fulfill that insatiable desire (Product developer, female, 41).

Even when people are aware of the negative consequences of cheap fashion it may not make a difference, as they have got accustomed to buying new things frequently. Due to the never-ending greedy character of modern consumption

(Campbell 1987), there will always be an insatiable desire to buy more. Some of the cheap fast fashion retailers are on the news frequently for using child labor or for being related to factory disasters. People still continue to buy from those retailers, either just because the products are cheaper or because they cannot afford to pay more. Even the Rana Plaza collapse in Bangladesh did not change the buying habits of most people. Either case, retailers are expected to sell garments at affordable prices to meet customer expectations and to maintain profits in order to sustain their business, and they have to sell more as the prices have become so cheap.

As a consequence of the increasing number of affordable styles in the market, consumption may have increased but the total spending per person is not higher. People may buy more stuff but spend less as it is cheaper. To give an example from the American market, from the 1900s to 1950s, American consumers spent approximately 12 to 14 percent of their annual income on clothing. Today, they spend about 3 percent but they have more than five times as many clothing items as they did at the beginning of the 20th century (Boboltz 2014; Tyner 2014). Furthermore, higher prices do not necessarily mean longer use. People do not necessarily wear a 100 Euro t-shirt more than a 10 Euro one. People used to wear something for a longer period, until it gets really old. This has become an old habit now (Owner, male, 57). The current consumption trend is throw away fashion and cheap products serve this trend perfectly well.

Ladieswear sales are decreasing in UK. They are almost 4 percent down compared to last year. Only ladieswear retailers that are successful are: Zara, Topshop and Primark, as they offer fashionable garments quickest and at affordable prices (Buying director of a retailer, female, 40s).

Meetings notes also indicate that both retail and buying prices have become very low and most successful retailers are often the fast fashion retailers that attract consumers by offering new styles and fashionable garments quickly at bargain prices. In 2013, Forever 21, H&M, Uniqlo and Zara, that offer trendy clothes at low prices, generated a combined \$48 billion in global sales. This growth spur is expected to continue. A recent report by the financial services firm Cowen

Group forecasts that fast fashion sales will increase 11 percent every year till 2020 (Gonzales 2015).

The declining retail prices make it difficult to compete and the retailers with lower prices are often the ones that increase their market share. For instance, discount fashion chain Primark has become very popular in Europe, in recent years, by offering fast-changing fashion items at very low prices (Buying director of a retailer, female, 40s). It has been growing and opening stores in many countries, becoming a threat for many high street retailers. While many retailers suffered in the economic downturn Primark more than doubled its profits from 233 million pounds in 2007-2008 to 514 million pounds in 2012-2013. It now turns over more than 4.3 billion pounds a year from 275 stores in nine countries. Its growth rate is even higher than the world's biggest fashion retailers, Inditex and H&M (Davey and Morris 2014).

Primark keeps prices low by sourcing basic garments from suppliers in Asia, China, India, Bangladesh, Cambodia, and Vietnam. Their efficiency is based on always having the best price in the market. According to my observations, the retail price for a vest is around 2.50 Euros and the retail price for a t-shirt can be as low as 3 Euros. They buy the big volume (around 1 million pieces), cheapest price, basic styles from Bangladesh. Upscale basics retail at 4 to 4.5 Euros. Fashion styles, which they aim to buy from Turkey only retail at 8 to 10 Euros. It is very difficult for other retailers to compete with these retail prices.

The secret of Primark's success is placing huge orders for top-selling items and passing on the savings to shoppers. For instance, they sell 150 million T-shirts a year. John Bason, finance director of Primark's parent company Associated British Foods, states that Primark's difference to other major retailers is charging less for comparable quality, even when it buys the clothing from the same factories. They don't have major overheads and they keep the overhead costs down, for instance by doing little advertising and marketing and relying instead on word of mouth and digital and social media (Davey and Morris 2014). Consequently, they can offer the lowest prices, which make it attractive for the consumers.

Field notes also indicate that there are retailers, especially supermarket stores that feel the need to change their strategy, as their sales are below previous years.

They have to decrease their price level further and do more volume business in order to regain their lost sales. They plan to buy long term and have fewer styles which mean bigger volumes and cheaper prices for the suppliers and easier pick for the customers. They will leave more space for open to buys in order to be more flexible against the changes in the market. These changes show that price and economic factors often play a very important role in establishing growth strategies of retailers.

On the supplier side, target buying prices are very low and difficult to meet as well. For instance, maximum buying price for a garment that is retailed at 10 to 12 Euros is only 3 to 3.5 Euros; target buying price for a garment that retails at 15 Euros is around 4.25 Euros; the buying price for a 4 to 4.5 Euros t-shirt is as low as 1.50 Euros; and target buying price of a dress that retails at 29 Euros is around 9.5 Euros. Considering that retailers work with very high mark ups, margins of producers need to be very low to meet these target prices. As the margins are very low, the companies need to do more business.

Target sales prices even started to guide the design of the products. One of the retailers explained that they decided to revise their design process following the "good, better and best concept", which means that the products which have higher retail prices will include more details.

I lost my faith in fast fashion. We make the best samples and send them to the customer earlier than other suppliers but the orders are placed with suppliers who offer cheaper prices. They use our samples as reference samples (Manager of the sampling department of a manufacturer, female, 40s).

The retailers are now exaggerating this fast fashion business. It is too much. Price is everything. They always place the orders with suppliers who give the best prices. Sometimes I have no orders because my price is five cents more and someone else gets the orders. It is not very ethical (Owner of a supplier, male, 57).

Consequently, price has become the most important factor for retailers when placing orders. Sometimes it is even more important than better garments. For instance, one of the well known fashion retailers has a new fast fashion model for some of its styles. They invite over their main suppliers. They present a design pack of 10 to 15 styles and explain what kind of garments they request. They want all the

suppliers to make these samples in two days. The styles have different fabrics, prints, embellishments, and details. The suppliers who make the best samples, quickest, and at best prices get the orders. However, at the end the retailer mostly places the orders with the suppliers who offer the cheapest prices, even if the others make better garments and present them earlier.

The expenses are increasing. However we need to maintain our prices to meet customer expectations. At the same time we are expected to make more money and profits. Therefore it is almost impossible to sustain this. A textile factory collapsed in Bangladesh. It was a supplier of some of the cheapest fashion retailers. This has become an issue on the news. However people say that they will still buy from those retailers because they offer affordable fashion. I do not think those companies even have a proper Quality Assurance Department (Buyer of a retailer, female, 30s).

These are tough times. Our sales are 10 percent less than last year and also below budget. We opened more stores but have less turnover. We buy for next winter now. We have long planned orders. We want to buy long term but with better prices. We want to have less styles, more volume, and easier pick for customers. For instance, one print but in three base colors. We want to decrease price level and do more volume business. Cheap fashion retailers are entering the market, which is a big threat, as our turnover is decreasing. They do not have any code of conduct or standards. We need to protest! They have been on the news many times but people do not care. They only care about their budget. Our babywear had the biggest share in the market but we are now losing it to competitors. We decided to change our store layout to improve sales. We have promotions and will sharpen our prices. We will buy long term basic, easy styles from Far East. We hope these will help to improve our prices and sales (Buyer of a retailer, female, 40s).

Above examples show that, it is becoming more difficult to compete and sustain one's business. Since consumers mostly care about buying affordable fashion, disregarding ethical and quality standards, fast fashion retailers that do not have any code of conduct procedures and standards are becoming a big threat, as they can offer cheaper prices. Therefore, other retailers struggle to compete against these unfair conditions and are often forced to revise their prices and strategies to be able to survive. Meeting notes show that, particularly companies that serve the middle

segment of the market find it difficult to compete with the lower end of the market because especially after the last economic crisis in 2008, people started to buy cheaper products. Even the companies that serve higher segments face competition and have to decrease their prices.

As a result, retailers put pressure on the suppliers to give lower prices. If the suppliers' prices are very high and far away from the targets, then the retailers often do not want to continue working together. Therefore, the suppliers most often have to decrease their prices in order to receive more orders. Sometimes, they need to change the fabric or style to get close to the target. Furthermore, to stand out, retailers mostly want to sell different fabrics, shapes, techniques, which are often more expensive. However, they do not want to pay the extra price and expect suppliers to maintain the same target prices.

Eventually, the competition has become less fair and more unethical, as factors such as price, volume, and cost become more critical to maintain business. Sometimes big suppliers confirm unattainable target prices to receive big orders from retailers. If they are a big supplier with a high turnover, they can confirm orders with volume even if they do not earn anything or even if they lose money from those orders. This way they also guarantee that their smaller competitors do not get more business. As a result, price has become the most important criteria and consideration for all the actors-customers, retailers, and suppliers. This can become a threat and a challenge for Turkish suppliers as explained in the next section.

5.2.2 Role of Affordability for Turkey

Textile industry is one of the most important industries in Turkey, in increasing both production and employment. Meetings and field notes reveal that most fast fashion retailers do not buy the basics from Turkey. Instead they prefer to buy premium fashion products and design from Turkey. However, the aim is to buy stunning products at competitive prices. Therefore, price is still an important factor. This is a big challenge for Turkish producers because they need to offer good design, good quality, and quick response, at affordable prices.

At the production side, textiles have become more difficult in the recent years due to increase in cost of both materials and labor. With rising costs of resources it is expected for the textile production to shift to countries where labor is cheaper, which

is a threat for Turkish suppliers. However, Turkey's place is still important as Turkish manufacturers started to offer design and quick lead times, and produce for fast fashion retailers worldwide. Turkey is now making trendier, higher quality garments that are difficult to produce elsewhere but they still have to offer these styles at competitive prices. The companies that can't adapt to this system can't survive (Merchandiser, male, 35).

The retail prices have decreased at the local market as well. One of the big Turkish retailers, which offer value for money, is responsible for the decrease in prices in the local market. It is very hard to compete with them because apart from having low prices, they invested a lot in design and improved the quality of their products. Consequently, they got bigger and provide a lot of opportunities and business for the local fabric suppliers, manufacturers, and print and embroidery houses that work for them (Owner of a producer, male, 40s).

At the consumer side, a survey held in Turkey shows that the first priority for the consumers is still price followed by quality. Compared to last ten years, importance of being green has increased as well, becoming the third criterion after price and quality, which signifies the increase in awareness on the consumer side (Consultant, female, 30s). However, only a small percentage of firms or designers work on sustainable fashion in Turkey, mainly due to economic and commercial reasons, as price is still a very important criterion. There are conflicting perspectives on affordability as well which are discussed at the end of the section, after examining the positive and negative outcomes of affordability.

5.2.3 Accessibility and Democratization of Fashion

Similar to speed, affordability of the current fashion system has both positive and negative consequences. According to analysis of the findings, one of the most important positive aspects of affordability is enabling accessibility, diffusion, and democratization of fashion. Previous literature also states that offering latest fashion trends and wider variety of goods at affordable prices make the industry attractive and accessible to many consumers (Scott 2005; Joy et al. 2012). Consequently, fast fashion system democratized fashion, enabling its diffusion and use by many; and helped the fashion industry to grow.

It can be considered as a system that exploits people but it is also true that it enables people to wear fashionable clothes at a cheaper price. The groups that created this system own the biggest supply chains in the world. The technology they have developed is unbelievable. They developed such a system that the goods are in the stores in one week after the suppliers ship the goods. This is not easy to establish. The system can encourage us to spend more money but at the same time we can buy it for cheaper. Instead of waiting till the sales period at the end of the season, we can buy things at the beginning of the season. It may be difficult to wait till the sales, especially for women and they end up paying more. The system offers a broader price range of products to choose from. It is obvious that it has made big changes in people's lives (Merchandiser, male, 35).

The system promotes to consume more but it has also become affordable making it possible for more people to wear fashionable items at a cheaper price, without having to wait for the sales period. It is not easy to establish such a system, which has made big changes in people's lives. In the past, only wealthy people used to follow fashion as most people could not buy the expensive fashion brands. Mass fast fashion retailers started to interpret the catwalk trends. This copying and adaptation made it possible for more people to follow fashion and wear fashionable items at a reasonable price (Academic director, female, 42). The "on-trend" clothes that were until recently only accessible to "urban fashionistas," are now available to a broader public, at bargain prices (Moon 2014).

Previously fashion did not change this quickly. Most people owned a sewing machine and women used to make their own clothing at home. As a result of the rise of retail chains and ready to wear clothing companies and the increase in number of styles and affordable products people started to consume more (Research and developer, female, 30s). People are buying more stuff but they are spending less as it is cheaper. Therefore, most do not care about the copying and imitation. They only care about buying affordable fashion, which often increases self satisfaction (Product developer, female, 41), as it fulfills desire for change and accommodates feeling of conformity at the same time.

On one hand, the accessibility of affordable products enables more people to wear fashionable items, resulting in more conformity within the system (M. Lee

2003). On the other hand, there is not one strong or distinctive trend anymore, as people no longer want to look the same because of their desire for uniqueness. Therefore, the characteristic of this period is complexity (Academic director, female, 41). Fashion becoming affordable has an impact on this as it enables people to access, consume, and mix different styles, products, and trends, facilitating the feeling of individual agency and distinction.

On the contrary, there are people who oppose the argument of fast fashion democratizing fashion. In her book, *Sustainable Luxe: A Guide to Feel Good Fashion*, Jordan Phillips, rebels against "McFashion", which he describes as "...a mass delusion that is a democratic right for everyone to purchase cheap clothing that looks luxe" (Kissa 2015). However, especially fast fashion companies argue that they are making fashion accessible and affordable for more people (Godelnik 2014). One of the founders of a ready to wear business states that "*it should be affordable for everyone to look and feel good every day.*"

Many people who cannot afford to buy expensive fashion brands started to follow fashion thanks to copying and interpretation, which is discussed in detail in section on design. As a result, despite the conflicting views on democratization of fashion, mass fast fashion retailers have helped fashion industry to grow and fashion to diffuse to whole world, enabling it to become a mass item, accessible for almost all social classes. On the other hand, affordability and cheap fashion has negative outcomes as well, such as exploiting labor and natural resources; encouraging disposability and increasing waste; triggering pricing pressure; increasing likelihood of tragic accidents; and undermining value of textiles.

5.2.4 Consequences on Welfare of Workers

Fairness in fashion comes when everyone pays the real cost of producing clothing; paying the people who make it fairly and not stripping out the fertility of our ecosystem (Safia Minney, founder and CEO of People Tree, 2014).

Fast fashion retail strategy focusing on bringing new trends to the market in the quickest and cheapest way has negative outcomes on workers and manufacturers. Despite the talks about compliance and concern for workers' rights and safety, in reality price is still the most important criteria (Hertzman 2014). Therefore, to meet

the requirements of low costs, companies, contractors, and subcontractors may need to disregard workers' safety, health, and working conditions (Godelnik 2014).

Prior literature and secondary data also state that establishment of the current system of cheap commodities based on exploiting of labor and natural resources is a result of rapid globalization of the world economy (Show and Holt 2000). Keeping prices low requires fast fashion companies to manufacture in countries where the labor costs are low, which makes it possible to have large quantities of items without paying much for them (Godelnik 2014; Tyner 2014). For instance, manufacturing costs are lower in places such as Cambodia, Vietnam, and Mongolia since there are no minimum wages or age requirements, or regulations on maximum hours worked (Gonzales 2015).

Consequently, textile production is outsourced to places like China and Bangladesh to raise profit margins of fast fashion retailers that mark up goods at 65 to 75 percent and make twice the profit of their competitors. Meanwhile, labor costs overseas are less than 1 percent of the retail price (Chua August 18, 2014). Livia Firth, the founder and creative director of Eco-Age, also states that fast fashion firms that choose to move their production to countries where labor is cheap, argue that they increase employment opportunities in those regions. However, they ignore to acknowledge that they work with factories that use workers like a slave in return for a small fee.

Garment workers are among the poorest laborers in the world. They work in dangerous and poor conditions to manufacture large volumes of clothes in extremely short turnaround times at the cheapest possible price. Many are exposed to toxic dyes and chemicals. In return, they can only earn a small minimal wage so that their governments can remain competitive in the global garment industry (Martinko 2015). Furthermore, in countries where the minimum wage is under \$100 a month, bribery is widespread. Unions might ensure workers fair wages and work conditions, but it is likely for these unions to become corrupt as well.

Chua, reported in one of her article dated 2014 in *Ecouterre* that Cambodian garment workers are working themselves to death. There were mass faintings at factories making clothes for famous Western brands and in 2014 three garment workers died. IndustriAll's general secretary Jyrki Raina said that workers cannot

afford to eat properly as a result of poor pay. Chronic malnutrition, long hours, and unbearable factory conditions are a lethal combination (Chua August 18, 2014). The international watchdog found evidence of forced overtime, inadequate rest breaks, use of child labor, and anti-union practices at factories.

Some of the worst working conditions in Cambodia are in smaller, unlicensed facilities that are subcontractors for larger, export-oriented factories. Many of them avoid paying benefits and workers are less likely to defend their rights for fear of losing their jobs. The authorities, government, or retailers do not accept accountability for ensuring compliance with international human and labor rights law. They do not feel responsible to protect and promote workers' rights throughout the supply chains (Chua March 13, 2015).

Health Hazards in Denim Factories in China is another example. Workers have to breathe the dust that comes from sandblasting the denim to achieve a worn look. Similarly, a 2014 study of garment workers in Bangladesh found that the majority suffered from ill health (Criado-Perez 2015). Some of the informants also addressed that the chemicals used in dyeing processes affect the health of people who work in textiles (Sales manager, female, 41). In factories in Shrilanka, there are still workers sanding the denim by hand to make something new look old. Although sand blasting or stone washing are actually no longer acceptable processes, as they are hazardous for health, it continues behind closed doors, and workers continue to die from lung diseases (Business and Research Manager, male, 40s).

Labor is so cheap in Far East there is no need to have it automated. They make distressed jeans using labor. Laser machine is environmental friendly but it is more expensive so all is done by hand. Plus there are thousands of people. If they are replaced with machines what will happen to all those people? (Global sourcing manager of a retailer, male, 50s).

Similarly, in most of the interviews and meetings attended, low wages and poor working conditions of the industry were addressed. The manufacturing costs are higher in Turkey. The manufacturers most often have to bargain with retailers to negotiate on the prices. Therefore, the retailers can prefer to buy from countries where wages are lower. Labor is so cheap in Far East that producers and retailers do

not prefer to have it automated, even when using machines is more environmental friendly.

I have been to India. In front of the factories there are queues of people who need jobs and who want to work. There are workshops inside the factories where people from all ages sit in lines to do hand crafts. Kids do embroidery on hoops. They are hungry and very poor. The firms that they work for are the biggest ones. Code of conduct not works there. They pay so little. These standards only apply in Turkey and in countries where labor is relatively more expensive (Designer, female, 30s).

Moreover, most retailers have double standards. They do not apply the same code of conduct procedures that they enforce in Turkey, in Bangladesh or India. As the labor is so cheap in Asia, they overlook the bad working conditions. However, cheap and affordable fashion comes with a price to pay. The Rana Plaza tragedy in Bangladesh, in April 2013, was a serious call to action. The day before the building collapsed large cracks were identified by an inspection team, and the workers were evacuated. The following day reluctant workers were forced into the building with sticks. They were also threatened with having their wages cut by a month if they did not comply. At the end, 1,133 people died, 2,500 injured, many disabled permanently when the building crushed. Two years later, victims are still waiting for brands to pay them compensation (Criado-Perez 2015).

Workers are being paid pennies to the dollar to make clothing that we are supposed to wear as fashion items. There is something deeply dangerous about that (Darabi, co-founder of Zady, from an article by Donatelli 2014).

The Rana Plaza Building collapse brought to light the situation many workers face in some of the leading garment producing regions of the world. Working conditions are often unsafe due to limited workers' rights legislations and poor enforcement of these regulations. While the billion dollars global fashion industry takes advantage of cheap labor and raw materials in developing nations and large retailers earn high margins, the workers in these regions only receive little payment for the garments they produce. As a result, they are paying the true cost of this

production by enduring the poor quality of life and increasing inequality (Chandak 2014). Darabi, co-founder of Zady, a conscious e-tailer, drew attention to this inequality in a panel.

Rana Plaza made headlines worldwide because of the scale of the tragedy but little has been done so far. The retailers blamed the subcontractors, the subcontractors blamed the main brands, and government blamed all but governments, companies, and consumers are all responsible. The cycle continues as before. We still fail to appreciate the human cost of the clothes and workers are dying every day in order to produce the clothes that we wear (Criado-Perez 2015).

Furthermore, apart from unhealthy and poor working conditions, notes taken in various meetings also reveal that the pricing pressure causes stress and tension both for retailers and suppliers. Margins keep decreasing as the cost of goods rise and retail prices are driven down by heavy promotions. It is difficult for retailers to compete with low retail prices and it is difficult for suppliers to meet the low target buying prices. The margins of producers need to be very low to attain these prices. Even when the best price is quoted the retailer can decrease the target further claiming that they received a better offer. It is very difficult to work in these conditions (Owner of a manufacturer, male, 57). Some companies go out of business and some have to merge to be able to improve their prices.

This business is not fair. It is very brutal. For instance, recently one of the retailers we work with wanted to cancel an order even though we had no fault. They placed a repeat order with us. The initial order was made in China. They approved our color and bulk fabric so we cut the fabric but then the buyer said that there is a color difference with the initial order which is not acceptable and she wants to cancel the order. As they approved the bulk and color we managed to convince them not to cancel the order but she said that she will ask for a discount if the goods do not sell. We had to accept this not to lose our business with them as it is a big customer but actually we have done nothing wrong. It was entirely their fault (Owner, male, 57).

Consequently, this system is very stressful for the actors working on the institutional side, especially for the suppliers. There is a lot of pressure on the manufacturers and most often the retailers reflect all the cost on the suppliers. The

suppliers feel pressured to bear the cost, even if they have no fault, in order not to lose business.

To endure this downward pricing pressure, products must be cheaper and arrive faster. However, at this speed and at such low prices, it is inevitable to have tragedies like Rana Plaza. Even though brands talk about compliance and sign safety agreements, they still care most about the price. Besides, once the cost of compliance with new health and safety standards is added, it makes it harder for suppliers to meet the target prices (Hertzman 2014).

Apparel companies that compete to drive down costs and increase margins, now also have to compete to enhance their reputation as good corporate citizens to be able to attract conscious consumers (Gonzales 2015). Each brand has its own standards for production and they expect the manufacturers to make the investment in order to fulfill these standards. As a result, many of the factories have invested in upgrading their facilities to comply with safety or environmental standards without assurance of future orders. Furthermore, if an order is delayed, damaged, or needs to be fixed, brands often expect the factory to cover the costs. Therefore, any production and compliance issue is often covered at the factory's expense. The only way factories can manage to survive is by having longer shifts and subcontracting production to other, even lower cost, and possibly non-compliant factories (Hertzman 2014).

... It all incurs a cost to ensure these standards. If manufacturers want to produce neon t-shirt, since it has become trendy, neon has high formaldehyde level, so they need to make sure that the formaldehyde level is less than 16ppm, which means using a special neon chemical which is twice as expensive. If suppliers and manufacturers want to adapt to these ecological standards they need to spend a lot of money. However, the retailers do not want to pay for this because it will reflect on their sales. As a result, the profitability margins of the manufacturers decrease. On the other hand the sales of these groups increase by 30 to 40 percent every year. They pressure the manufacturers to decrease their margins rather than decreasing their own margin. The resource costs such as cotton prices increase every year too. The manufacturers try to explain these to the retailers. Furthermore, especially the fabric and accessory suppliers, embroidery and print houses need to make new

investments to develop themselves in order to be able to sell to fast fashion retailers... (Merchandiser, male, 35). (The rest of the quote is related to code of conduct and traceability.)

Consequently, textiles production has become more difficult and more chaotic as manufacturers need to take into account all the standards and tests, which all incur a cost. If producers want to adapt to these standards they need to spend a lot of money but the retailers do not want to pay the additional cost because it will reflect on their sales price and thus on their sales volume. They expect the manufacturers to absorb the cost. For instance, when retailers sign campaigns such as Greenpeace Detox Campaign, if they do not reflect the cost on their retail prices, they often reflect it on the manufacturers. Similarly, in a supplier code of practice workshop held in 2014, the manufacturers raised their concern about who will bear all the extra cost of becoming sustainable. They assume that the retailers will expect the suppliers to cover these costs instead of sharing the costs with them.

Apparently, it is difficult to offer cheap prices and meet all the ethical and safety standards at the same time. The manufacturers further have to cope with increasing resource costs but they still can't raise the cost of their goods, due to pressure from big brands (Hertzman 2015). As a result, the profitability margins of the manufacturers decrease. On the other, hand the sales of fast fashion groups increase by 30 to 40 percent every year. Tension, conflicts, and instability arise from this growing inequality (Chandak 2014).

Zara was on the news. Forever 21 was on the news. Primark is always on the news. How can all these companies cope with the ethical issues? We are as a supplier expected to meet certain ethical and safety standards and guidelines, which increases our expenses. Our sales are not bad but we have zero profit. However there are suppliers who can supply to even Primark in Turkey so I do not understand how they meet these standards with such low prices (Owner, male, 57).

Apart from having very low target prices, unfair competition is the other major problem faced by suppliers. Retailers compare the price of a producer who employs uninsured workers to a producer who follows ethical standards and code of

conduct. The only way certain retailers can manage to sell at such low prices is that they do not have a proper code of conduct and they produce everywhere with no controls or standards.

Companies have taken steps to improve compliance standards and carry out stricter investigations of their factories but the lives of workers have not been improved. Factories need to pay their workers more but brands are pushing so hard to lower factory costs that the facilities are now working on extremely thin margins. Besides, unethical producers and contract manufacturers are decreasing in number as they cannot survive anymore. This requires good manufacturers to increase in-house production capacity as they cannot outsource the production. Getting bigger means having more employees and having higher overhead costs. Considering that the retail prices and margins are very low, higher overhead costs requires the suppliers to have more business and to sell more (Owner, male, 57). At the end it all becomes a vicious circle.

Hertzman (2015) in his article in *Business of Fashion* argues that the problem begins at the consumer level. As consumers want to pay less for products the operating costs of retailers are increasing and their margins are decreasing. If customers are willing to spend a little more on clothing, it will improve retailers' financial position. This could then trickle down to the factory and the garment worker. However, it is not for sure that fashion companies would be willing to give up their profit to improve the lives of their factory workers, as greed to earn more continues to drive the consumption culture and overrides ethical believes.

5.2.5 Consequences on Environment: Waste

Price becomes an important factor when we are buying something. However, there are environmental and social costs of buying cheaper and low-quality products and these costs are mostly hidden behind the marketing campaigns (Noble 2014; Tyner 2014). Eco-textiles consultant, Kate Fletcher, addresses that cheap fashion comes at a price. Lower prices mean exploiting textile producers and workers further down the chain, as addressed in previous section. It also means exploiting the natural resources and the environment (Styles 2015).

Fast fashion democratizing fashion so that the masses can buy is a massive argument but what does democracy mean? Democracy for everything means if we are going to be democratic about what we can afford then it has to be what the planet can afford and what the society can afford and actually we can't afford the level of constant consumption that we are currently engaging in and it is false. We have been told that the things are just going to be there forever but this is as false as a lie. We can come up with a million clever ways of finding new ways to keep consuming as much as we do but there is got to be a cut of point so we might as well start turning around and looking at it and saying "what is it now?" (Business and Research Manager, male, 40s).

Some of the informants also raised their concern that the planet cannot afford the level of consumption that people are currently engaging in. Therefore, fast fashion democratizing fashion is actually a false argument because enabling masses to buy fashionable items has negative outcomes on the planet and the society. Mainly due to costing pressures, brands do not have production in one factory. They use a lot of small contract manufacturers all over the world. These goods are then often transported to one distribution center and then sent back to the stores all around the world, which is a serious emission (Consultant, female, 30s).

A \$5 dollar t-shirt may feel good initially, but that's an empty high. When we work backwards to determine what a worker must have been paid to make such an inexpensively priced item, and you realize that that shirt will only last a few months before it falls to pieces and ends up on a landfill. Then second thoughts arise (Darabi, co-founder of Zady, from an article by Gonzales 2015).

Prior research also address that offering latest fashion trends at reasonable prices leads to rapid product turnover and high waste outputs, encouraging disposability (Fletcher 2008; Biehl-Missal 2013). In the current system, customers constantly buy items because they're so cheap; they use them just once or twice before discarding them (Godelnik 2014). Furthermore, competition based on low prices has led to production of lower quality clothing (Cline 2012). Fast-fashion products are often designed and manufactured to get old after a few washes, so that the consumers will go back to the stores to buy more. As a result people end up spending money on large quantities of cheaply made clothing (Gonzales 2015). For

instance, the 60 million people in the United Kingdom have an estimated £30 billion in unworn clothing in their closets (Walker 2014).

Globalization allows us not to pay very much for our clothes. If people buy at a deeply reduced price, they have a throwaway mentality about clothes, and that's the one major factor that's a problem (Gonzales 2015).

In her book, *Over-Dressed: The Shockingly High Cost of Cheap Fashion*, Elizabeth Cline describes the current disposable fashion culture and what happens to unwanted clothing after donating it to charity. Globalization enabled the production of cheap clothing and people now only care about buying clothes for cheaper (Owner, male, 57). Linda Welters, fashion professor at the University of Rhode Island, also draws attention to this throwaway mentality about clothes.

As a result, current fashion industry practices based on selling large quantities of cheap, low-quality products have led to global resource depletion and other irreversible damages to the environment, such as dumping of toxic chemicals and tones of unwanted textiles ending up in landfills each year. For instance, the Chinese textile industry only creates 2.5 billion tons of wastewater discharge annually (Walker 2014). Considering that it takes 20,000 liters of water to produce 1kg of cotton, which is equivalent to a single T-shirt and a pair of jeans, high volumes require greater use of raw materials, energy, water, and other resources, contributing to depletion of natural resources and to climate change (Chandak 2014). The UK based organization WRAP estimated that, the processes from raw material to garment supply approximately make up one-third of the waste footprint, three-quarters of the carbon impact, and most of the water footprint of clothing (Godelnik 2014).

Alex McIntosh, Business Support Manager for the Centre for Sustainable Fashion based at LCF, also addressed the environmental impact of clothing in a Radio program. He drew attention to high carbon footprint involved in making one T-Shirt and urged consumers to re-think about fast and cheap fashion (The Cost of Carbon 2009). Leading designers such as Stella McCartney and Eileen Fisher, and apparel companies such as Quicksilver, Lululemon Athletica, and Patagonia, are now

tackling the hidden environmental cost of cheap clothing (Leading the Way, *Fashion Loved by Forest*).

5.2.6 Societal Implications: Undermining Value

While being affordable and trend-sensitive for consumers, and profitable especially for large retailers, the current fashion system also raises fundamental ethical issues and social implications (Joy et al. 2012).

Why is the "fast fashion" model so sacrosanct? It's the "quick-fix buy" way of producing and consuming fashion that has led to the industry's widespread social, environmental, and creative exploitation. Through relentless, million dollar marketing, big brands and retailers have managed to convince the world that faster, cheaper, mass consumption products are somehow democratizing fashion (Sarah Ditty, Fashion Revolution, from an article by Martinko 2015).

As mentioned in a previous section, big brands and retailers have managed to convince people that faster, cheaper, mass consumption products are democratizing fashion. However, among others, Sarah Ditty from Fashion Revolution, a UK-based organization also argued that fast fashion is actually not that innocent. CEO of H&M, Karl-Johan Persson, stated in *The Guardian* that reducing consumption would create a social catastrophe. As a counter argument to mass consumption of faster and cheaper products democratizing fashion, Ditty gives social and environmental problems that fast fashion generates.

Moreover, the current prices undermine the value of textiles and the effort put into it. The fast fashion system and retailers created this problem by offering cheap products, promoting cheap textiles, and thus cheap labor. They benefit from the current system by copying designs and offering them at low prices, disregarding the value of fashion and level of effort put into making of clothing (Designer, female, 30s). Due to the cheap prices and the poor quality of many items some even describe fast fashion as "McFashion", "landfill fashion", "throwaway fashion", or "cheap crap" (Godelnik 2014).

It is difficult for the consumer culture to change and for consumption to decrease. It is the same for all of us. We buy a pair of shoes, leave the store and start looking at

another shop window immediately. We don't buy anything out of need. We buy because it is fashion or it is beautiful. There are sales all the time. Everything is consumed a lot and I think it is difficult for this to slow down. As people buy more what they own loses its value. For instance, I used to have 3 Barbies. I knew the names of each. It was not easy to buy a Barbie at that time. People could not find them everywhere. I still keep them. My friend's daughter just had a birthday party and she received 18 Barbies as presents and by the evening one lost its head, other its arm, most did not have any clothes on. Accessibility and affordability means more consumption (Research and developer, female, 30s).

Products becoming affordable and accessible promote continuous consumption and as we own more stuff what we own has less value. Some of the informants believe that it is difficult for the consumer culture to change and for consumption to slow down because we don't buy anything out of need. People got so used to consuming all the time that even an ecological or any other crisis can prevent this ubiquitous consumption (Designer, female, 30s).

The British designer Vivienne Westwood criticizes the rise of disposable fashion as well. The advent of cheap fast fashion retailers and supermarket fashion lines selling items at very low prices has created a boom in fast fashion, where consumers' are dependent on quantity rather than quality. As a result, women today have four times as many clothes than they did in 1980s, but as Westwood claims they have never dressed so ugly (Thomas 2012).

Three generations in my family worked in textiles. I consider textiles as art. I find it wrong for a textile product to be manufactured at such low prices. People should be able to use a garment for 10 to 20 years, which is against today's fast fashion philosophy. Textile business is a valuable and a difficult business. How many people work at making of one t-shirt? This is not the price and value of this. These products should not be sold this cheap. This is the real problem. To make a cheap consumption product is wrong to start with. Textile is art and it needs to remain like this. Big fast fashion retailers destroyed everything. I blame them (Designer, female, 30s).

Both prior research and findings show that due to excessive consumption and quick disposal of clothes (Biehl-Missal 2013) consumers no longer have a personal and long-lasting interaction with their clothes and have little regard for the craftsmanship of the products (Cline 2012). People used to own precious garments that they valued and that were sewn by famous tailors of the time. They no longer have that understanding of quality and value. Clothes have become almost worthless as it is so cheap to buy a new one. However, textiles require a lot of effort and it is a valuable and a difficult business, which should be considered as art and should not be this cheap (Designer, female, 30s).

Luxury is different. Luxury has an inherent idea about long term value because unless a person is a Russian oligarch she does not buy 200 Hermes bags. She buys one Hermes and she probably has it for the rest of her life or maybe she may buy 5 over the course of her lifetime as each of them is 3000 or 4000 pounds. They are a massive investment piece and people probably kind of adore them and are in aura of them. They know inherently that they are a business of craftsmanship and actually in the end some of it is just not true because they are actually just made in the same factory but people have a sense of what they mean and that is the problem with fast fashion as it strips all the meaning away. With fast fashion, people are not looking at any of the back stories and what the brand really stands for. When people go to fast fashion retailers like H&M or Topshop the only thing they stand for is quick, available, cheap clothing. That is it and then there is also stuff that they put around it. The reality is that the consumer is asked to see a lot of stuff that they can buy at a price that allows them to buy it regularly and constantly. Whereas luxury tells people that they just can't buy this all the time. This is aspirational, this is something they have to save up for but it still encourages people to buy (Business and Research manager, male, 40s).

Both luxury and fast fashion companies encourage people to buy more but luxury is different than fast fashion. Luxury is something that people aspire; something that they cannot buy all the time; and that they need to save up for it. It signifies long term value. Whereas fast fashion is quick, available, cheap clothing that people can buy regularly and constantly. On the contrary, people buy less of

luxury items and they keep them for longer. They are seen as investments that are adored and valued. Fast fashion strips all this meaning away.

The difference between luxury and sustainability is that everything sustainable does not necessarily be expensive as luxury products. However, everything should have some value. It is not just about cost. Everything should stand for something and the decisions we make about purchasing something should be based on the fact that we either really love that thing; it is beautiful; I want it; but I also know I trust it; I believe in it; and it interacts with what I want the world to be (Business and Research manager, male, 40s).

On the other hand, everything is not just about cost and sustainable fashion should not always be related to luxury. For something to have value it does not need to be expensive. People should buy things that they really value and believe in. Fast fashion takes this value away. Consequently, democratizing fashion and making it available to everyone is not necessarily good. One of the informants' stated that people should invest in fashion because they genuinely care about it, even if they do not have that much money. Buying something that looks like the original is not valuing fashion, as there is value in the thing itself not in something that looks like it. People need to get this attitude back for fashion to regain its value (Business and Research manager, male, 40s).

Some of the retailers in meetings attended also underlined the importance of quality and added value, and started to criticize cheap fast fashion retailers for selling disposable fashion. They want to be known as a value for money brand; not a cheap brand selling disposable products. Therefore, they do not want their garments to look cheap. They no longer want to simplify styles and change them to make them cheaper. Instead, price point of the style can increase if it looks beautifully made and strikes out. However, even though some retailers underline the importance of quality and the necessity to maintain their standard despite the affordable prices, in reality they often have to compromise on quality to reach target prices. Therefore, price is still more important than quality.

Consequently, it is important to reconsider the approach to clothing and focus on quality and value rather than quantity, to combat rising costs and the ethical

dilemmas of cheap clothing. Much of the cheap clothing consumed in high quantities is low in quality and most people wear about 20 percent of their clothing 80 percent of the time. The remaining is a waste of space and money. Therefore, as Tyner (2014) suggests, instead of buying five fast fashion, low-quality items, people actually can invest in one or two quality items at a higher price point. This way, there will also be fewer clothes to dispose or to donate and the items that people own will have more value.

Similarly, eco-textiles consultant, Kate Fletcher also argues that quality should cost more. People should buy fewer products, but higher in value. She states that jobs will be preserved as workers will spend longer on each piece (Styles 2015). As a result, the fast fashion industry and retailers need to re-examine their supply chain to enable fashion to regain its value. In this respect, it is important to question if affordability is a barrier in fashion becoming sustainable.

5.2.7 Affordability as a Barrier to Sustainable Fashion

Ethical clothes only work when they look good and are affordable (Helena Helmersson, Head of sustainability of H&M, from an article by Rickey 2014).

Affordability which has become critical in success of fast fashion retailers and suppliers is likely to become a barrier for mobilization of sustainable fashion. When consumers are clothes shopping, they often consider an item's price, followed by quality, and fit, which override ethical concerns about where, how, and by whom the item was made (Champ 2014). Consequently, the sales of sustainable fashion companies and products are much lower than their fast fashion competitors, mainly due to higher prices of sustainable garments.

Gonzalez (January 5, 2015), in her article titled "*Why is Slow Fashion So Slow to Catch On?*" makes a comparison of the prices of fast fashion and slow fashion garments. For instance, price of a dress from a fast fashion retailer is \$15.90, where as a similar dress from a slow fashion site retails at \$145; a fast fashion sweater is \$24.90, while a slow fashion sweater is \$160; fast fashion trousers are \$17.90, while slow fashion ones are \$128. Some fast fashion retailers now have price points as low as \$1.80, selling T-shirts for \$3.80, leggings for \$5.80 and denim jeans for \$7.80.

Furthermore, fast fashion retailers keep on strengthening their market presence by increasing the number of stores. For instance, currently Forever 21 has around 600 stores worldwide and it plans to double this number by 2017. Zara operates at almost 1,800 locations and H&M owns around 3,400 stores. It is very difficult for sustainable fashion companies and brands to compete with these numbers. As shoppers have become budget-conscious and got used to shopping from fast fashion stores, it has become inevitable for retailers to offer trendy clothes at low prices (Gonzalez 2015).

Not only in fashion but in all areas, sustainable products are perceived to be more expensive by consumers. This perception needs to be changed. Actually the producers create this perception. If they produce a sustainable product they want to sell it at a higher price. People have this perception but it is somehow the producers fault to create this perception (Assistant consultant, male, 30s).

Even when consumers are willing to buy responsible products, they get cautious and suspicious about the prices of these products being so high. The results of a survey held in Turkey show that if the price is the same, people will buy responsible products. However if the price is slightly higher they do not buy it. Similar opinions to the survey results were shared in *Green Work Conference* in Istanbul (Consultants, male and female, 30s). Not only in fashion but in all areas sustainable products are perceived to be more expensive. The producers are partly responsible for this perception because if they produce a sustainable product they want to sell it at a higher price even if it does not cost more to produce it. As a result, customers are hesitant to buy ethical clothing because of perceived high cost (Champ 2014).

...When retailers ask for a price quotation they ask with normal cotton, organic cotton, and some percentage of better cotton, to compare. To be considered as organic, the ratio of organic or better cotton needs to be 90 to 100 percent but some retailers only use 10 percent and still consider it as organic. They are misleading people. The sustainable fashion is really related to changing the whole lifestyle. At the moment it is only a part of fast fashion. They may want to raise awareness but

they know that people cannot afford to buy it so they use something to give the sustainable feeling and put the label... (Sales Manager, female, 41).

On the other hand, most often it costs more to manufacture sustainable products. For instance, organic products are more expensive. Retailers are aware that if they use 90 to 100 percent organic materials they will not be able to sell it as people will not be able to afford the high prices. Therefore, when they want to sell organic products they only use a small percentage of organic materials, which is actually misleading the consumers.

In Barcelona there is a design area where local Spanish designers have stores. There are also other streets and areas where people can find local designers in Barcelona, which is nice but the products are more expensive than what people can buy at other high street stores. So maybe they can buy one piece once a year. They really work alone so they cost more and samples are very expensive. I think it is mainly to do with the economy. If there was no crisis, local designers could have done better now...Three or four years ago, more people were shopping from local designers and vintage stores but with the crisis people have gone back again from local designers and vintage stores to high street stores and fast fashion brands because they are cheaper and they really have good design (Designer, female, 28).

Local designers most often cost more and are more expensive than fast fashion retailers as well. It may feel more special and valuable wearing a unique, hand-made item from a local designer even if it costs more. However, due to economic reasons, people shop less from local designers and vintage stores. Therefore, economic factors are seen as a barrier to success of local designers as people are likely to prefer affordable fashion especially when the economic circumstances are bad.

I try to make a sustainable collection but as I cannot earn any money from it I have to become a hypocrite and work on the other side of the business to make fast fashion collections as well. I try to contribute to sustainable fashion because I at least want to do my share and see it as my duty. But I have to continue working for fast fashion companies as well since I need to make money (Designer, female, 30s).

Analysis of the findings also indicates that the economic dimension of sustainable design is very important. Designers who want to have an eco or sustainable brand or a collection usually cannot afford to be sustainable. They often complain that it is very costly; and no one wants to support them unless they earn money from it. As a result, it is difficult to find producers. Therefore, even if designers want to make sustainable collections they still have to continue working for fast fashion companies in order to make money to support their sustainable collections.

The jackets made from recycled materials which we sold in Japan were expensive but there they used them as a marketing instrument. They were sold at price of a leather jacket. It is expensive to make these products but if it becomes mass and the quantities increase then the makeup cost and price decrease as well. It is related to quantity. However, what I do at the moment is a very small boutique portion of this. It is a very small portion of my collection as it is costly (Designer, female, 30s).

One of the main concerns is the cost of sustainable collections. It is important to keep the products within an affordable price range, which is challenging. It is especially costly to make these products when the quantity is small and it is produced on a small scale. If it becomes mass and the quantities increase, then the makeup cost and price will decrease. Otherwise, if sustainable fashion is done in boutique quantities at expensive prices, it can only serve to a small segment and is often related to luxury.

Burberry addresses that they are associated with and are known as a British heritage brand. I watched their video on how they launch their new stores at a conference recently. Everything supports British craftsmanship, from walls to door handles, the entire artisan supports this. Burberry underlines that for luxury brands they use highest quality and pay attention to handcrafts. They state that people use their products not only for a year but for 20 years. If we look at it from that perspective, it is sustainable but not affordable. It is not a mass item. It is not something that everyone can afford. It will only cater to a certain segment. In that

respect, it is important to examine if affordable high street brands are doing anything on sustainability (Academic director, female, 42).

Some luxury brands can be associated with sustainable fashion as they support heritage and craftsmanship; they use higher quality materials; and people can use their products for many years. Some of the informants' also associated luxury fashion -expensive products with good quality- with sustainability because they are higher in quality and they can be used for longer. If people can still wear the same thing after eight years and it is still not out of fashion and in good quality, than it can be considered as sustainable (Owner, male, 57). However, luxury products are not affordable for everyone and therefore, they cannot serve the mass segment. In this respect, it is critical to have sustainable fashion brands and companies that are more affordable and that cater to a bigger segment (Academic director, female, 42). In order to have a more affordable price and to become a mass item, sustainable fashion needs to be done on a bigger scale and supported by big global retailers (Designer, female, 30s).

It is bound to be more expensive as it is against the system. I collect rubbish, clean them and then use manual labor. Handcrafts and manual labor hardly exist now. When all is done by hand it is more expensive. The system is against me and works in a contrary way (Designer, female, 32).

On the other hand, there are also informants who do not consider price as a barrier and they do not find it necessary for sustainable fashion to become mass. They find it natural for sustainable practices to be more costly and expensive. For instance, upcycling is expensive as it is a difficult process and it is against the principles of the current system based on consumption. People who are conscious and who can afford responsible or sustainable products will pay the extra price and buy these products. Therefore, sustainable brands need to target these people.

However, in reality consumers can buy new and current styles for around the same price as used products. Furthermore, since clothing has gotten so cheap, it makes more sense to buy new things instead of repairing or altering the old stuff. This resulted in decline of tailors. To give an example from America, between 1900

and 2013, tailors in the U.S. declined from nearly 230,000 to just 21,400 (Boboltz 2014). Similarly, the retailers find it too expensive and costly to provide services to make amendments. It is more expensive for them to change a garment so they prefer to make a new one and do not want to spend time or money with mending or alterations.

There are loads of examples of services that are happening but the problem is that the retailers also think it is too expensive for them. It costs them too much money to make the changes. It is more expensive for them to change that garment than to make a new one so they don't want to do it. But there are companies like APC, which has this model that they apply in London, in New York, and in Paris. People can bring their old pair of jeans and they have a whole range of jeans to choose from. They are basically selling something worn by people but they mend them and fix them up and resell them. When someone brings back a pair that they have worn out then they get the new pair at wholesale price. APC sells the old pair and people get a new pair at whole sale price and the whole point to that is some people love really worn jeans and some people love really new jeans. So actually if a person wants worn jeans they can buy some jeans that somebody has already worn instead of paying a lot of money to get one that is distracted. It is just insanity... (Business and Research manager, male, 40s). (Rest of the quotation is in section initiators of change.)

Some of the informants believe that recycling can be the solution to break this cycle. There are successful examples such as APC. People bring their old pair of jeans and in return they offer a range of jeans to choose from. They mend them and fix them up and resell them, so when someone brings back a pair that he or she has worn, they get the new pair at wholesale price. Therefore, if people want worn out jeans they can buy jeans that somebody has already worn instead of paying a lot of money to get one that is distracted. As a result, even though affordability is an important criteria, there are examples that show that sustainable models are not always more costly or more expensive.

5.2.8 Summary of Conflicting Perspectives on Affordability

Current fast fashion system is based on affordability and availability of cheap clothing, which is an important element of contemporary consumer culture. Similar to speed, there are conflicting views on affordability as well, as addressed in detail

above. In this section, I summarize these perspectives. In meetings and interviews affordability was related to accessibility, diffusion, and democratization of fashion; and economic success and growth by fulfilling consumers' desire for new.

Desire for new is one of the most important driving forces behind fashion consumption. People get satisfied by buying something new and fast fashion retailers fulfill this desire by offering new items constantly at cheap prices, which enabled them to become successful and to grow. Furthermore, offering latest fashion trends at affordable prices democratized fashion, enabling its diffusion and use by many. Consequently, despite the conflicting views on democratization of fashion, fast fashion system and mass fast fashion retailers helped fashion industry to grow and enabled fashion to become a mass item. Moreover, the accessibility of affordable products allows more people to wear fashionable items, resulting in more conformity within the system (M. Lee 2003). However, fashion becoming affordable also enables people to mix and match, fulfilling desire for distinction.

On the other hand, affordability was also associated with unhealthy working conditions and stress; disposability and waste; and lack of quality and value. The current system of cheap commodities is based on exploiting labor and natural resources. Apart from unhealthy and poor working conditions, the pricing pressure causes stress and tension both for retailers and suppliers. As price and cost become more critical to maintain business, the competition becomes less fair and more unethical. Furthermore, price becoming the most important criteria becomes a threat and a challenge for Turkish suppliers, as they are expected to offer good design, good quality, and quick response, at affordable prices, despite the rising costs of resources. Selling large quantities of cheap, low-quality products also leads to global resource depletion, and other damages to the environment, such as increase in textile waste. Moreover, current prices undermine the value of textiles and the effort put into it.

However, currently price is still one of the most important criteria. Therefore, it is critical to have sustainable fashion brands, companies, and products that are more affordable and that can cater to a bigger segment. As a result, affordability which has become critical in success of fast fashion retailers and suppliers and which

helps to fulfill desire for new for consumers is likely to become a barrier for mobilization of sustainable fashion.

5.3 Design and Aesthetics

Review of literature and analysis of the findings show that along with speed and affordability, design and aesthetics also have an important role in the current fashion system. Today, fast fashion brands and companies need to be quick and affordable but they also have to offer aesthetically beautiful products and latest fashion trends.

Importance of design and aesthetics is not new to the fashion system. Prior literature indicates that at no time dress has been primarily functional, as fashion has always been an art form and a symbolic social system (Wilson 1985, p. 302). Wilson's argument is similar to that of Baudrillard (1969), in that fashion always has social meanings and aesthetic considerations. Marketing instruments make use of these aesthetic and experiential means to increase consumption (Biehl-Missal 2013). For a long time mid-range, affordable clothes weren't trendy. However, it is no longer enough to be quick and affordable. Design has become an imperative tool for success in the current fast fashion system. Budget fashion probably owes its success to filling this gap in the market by offering fashionable garments at an affordable price (Kissa 2015).

In the following sections, first I discuss the positive outcomes of having strong design, such as delivering growth and economic success, and gaining competitive advantage. Then I address the role of design for Turkish suppliers. Copying, which has become an imperative part of design in the current fast fashion system, is discussed in a separate section along with its implications. I conclude the section by evaluating the changes in consumer expectations of design and aesthetics, and association of design, aesthetics, and sustainability.

5.3.1 Role in Enhancing Growth and Competitive Advantage

Prior research states that offering new designs and new collections is critical in order to keep customers coming back (Tokatli 2008; Tokatli and Kizilgun 2009; Cline 2012; LeBlanc 2012). Similarly, analysis of the findings show that, along with quick lead times and affordable prices, most retailers today want continuous and strong design input. Retailers who do not follow fashion quickly acknowledge that

they lose sales because they are slow in offering fashionable items and following trends. In the meetings attended, even the less fashion oriented retailers addressed that they want to have a more modern handwriting and offer more fashionable items in their stores in order to increase their business.

Analysis of the field notes also reveal that the suppliers constantly need to present fashionable, different, and new styles to be able to get orders. Some of the fast fashion retailers have a sign off every six to seven weeks. Immediately or couple of weeks after the sign off, they need new designs for the next coming theme. Some even book new styles every week, which makes it crucial for the suppliers to offer new designs all the time.

...Zara group has a different system than most other retailers. Everyone is at their doorstep with new designs. If they like the design they place an order. If they do not like designs submitted three successive times then they do not meet with the supplier the next time they visit. To be able to supply to Zara suppliers need to be extremely strong in design (Owner, male, 57). (Rest of the quotation is in speed section.)

Design is especially critical for the most successful fast fashion retailers. For instance, suppliers even open offices near their headquarters and hire local designers to be able to work with Inditex group, as they need to work very closely with them and invest in design to be able to become their supplier. It is very important to offer new techniques, fabrics, and styles before anyone else and supply them with new ideas all the time to be able to get new orders. They want to buy unique and different designs and expect to be inspired by the suppliers. Strong and continuous design feedback is also important for H&M. Suppliers who make perfect samples and offer great design on time can only be invited to attend the selection meetings in Sweden. Only the selected designs are likely to become orders. Therefore, successful design means more business both for suppliers and for retailers.

Consequently, design takes an important part in roles of actors working in the fashion industry. The designers who work for fast fashion brands need to follow the trends and the catwalks and then develop their own styles based on these trends and images. They follow the sampling process so that the samples come out perfect. They often revise the styles many times according to the customers' feedbacks.

When people, for instance fabric and accessory buyers, deal with both production and development, production issues are always first priority, not to delay the shipments. Therefore, design issues can become second priority which is a big problem, as design is very important to become successful. Establishing a proper design system and a systematic design procedure is as important as having good production and quality. To be able to grow and to increase sales, companies need to invest in design. The design department needs to have their own sampling, fabric and accessory follow up teams to be able to work efficiently and to be able to develop good styles (Designer, female, 30).

Informants addressed the importance of establishing a good design team and a design system in increasing sales and becoming successful. To be able to grow, investing in design is as important as having on-time delivery and good quality. For the companies to succeed, it is critical for the other actors to support and work together with the designers. Even the merchandisers, on manufacturing side, whose main job is to follow production and orders, provide support to the design team. They follow fashion trends; share the customer themes with the designers; and give feedback on the designs to ensure that the styles created are commercial (Merchandiser, male, 35). On the retail side, the product developers work with garment and fabric suppliers, designers, and the sales and merchandising teams to develop new styles and collections (Product developer, female, 30s).

*No one wants basics. In crisis, if people are buying something, it needs to be different. If I do not have money, why buy same thing over and over!
Need to offer temptations that people cannot resist. Details that make a huge difference but will not become a problem in production are critical (Buyer, female, 40s).*

Apart from enabling to have more business, offering unique design can also become a competitive advantage. It is preferable to sell garments with added value and original design to differentiate oneself from other suppliers. Otherwise, suppliers need to compete on price and whoever gives the cheapest price gets the order (Owner of a supplier, male, 57). In this regard, Turkey has an important role as a fast fashion

supplier as it offers design input along with quick lead times, which is discussed in the next section.

5.3.2 Role of Design for Turkey

In many of the meetings attended, offering design and fashion products was stressed as Turkish suppliers' competitive advantage. Therefore, Turkey is often considered as a source for fast fashion items, rather than basics. Supplying from Turkey becomes interesting and advantageous when the styles have something extra, such as different fabric, shape, or graphic. Then the retailers can market them at higher price points. Otherwise, they become basics and therefore are not placed with Turkish suppliers.

I believe that fast fashion will continue like this. It is difficult to break this cycle. Especially for countries like Turkey, that only managed to transfer from being a contract manufacturer to selling brands and designs, fast fashion will continue to develop with full speed. Retailing is huge in Turkey. There are firms that try to develop Turkish retailing and textile industries further. All these manufacturers and retailers want to become a brand and want to sell their designs both in Turkey and abroad. To be able to do this they need to compete. They need to be moving away from contract manufacturing. They need to improve their quality standards and design. Becoming sustainable is not a very realistic aim when they have these targets to meet (Academic Director, female, 42).

Fast fashion is important for Turkish manufacturers that only managed to transfer from being a contract manufacturer to selling design, as they want to grow further; become a brand; and sell their designs both in Turkey and abroad. Considering the current conditions and the difficulties of the textile industry, offering fashion and design is the only way to compete and to survive for Turkish suppliers (Sales Manager, female, 41).

10 or 15 years ago manufacturers in Turkey used to manufacture only what the retailers asked for. They did not offer any design. Now, both the suppliers and manufacturers have their own designers. They buy the newest styles from trendy stores like Topshop and prepare similar developments. 15 years ago this seemed

almost impossible but most of the suppliers are working like this now (Product developer, female, 41).

Moreover, Turkish brands are also inspired from the foreign fast fashion brands and started producing more beautiful items. Eventually, Turkish fast fashion retailing has developed as well. Turkish brands such as Lcwaikiki, Koton, and Collezioni started opening stores abroad. One of the informants addresses that it is important to consider these positive aspects of fast fashion along with the negative outcomes (Merchandiser, male, 35). Similarly, copying which is an inherent part of the current design process has some positive and negative outcomes, which are discussed in the following section.

5.3.3 Copying as an Inherent Part of Design Process

Fashion development is supposed to be a creative and an aspirational process. With the industrial revolution and a focus on mass production, much has changed in the fashion industry. Especially with the rise of disposable fast fashion and powerful fast fashion retailers, creativity has been replaced with copying and efficiency; and quantity is now preferred over quality.

According to me fashion is adaptation of change by the whole world. Famous designers or design centers create something new and the whole world interprets this. If we consider what we do at work, it is more or less the same. Fashion can also be interpreted as copying and interpreting something that has become a trend (Merchandiser, male, 35).

Eventually, copying has become an important part of design in the current fast fashion system. Even the phrase "fast fashion" refers to "low-cost clothing collections that imitate current luxury fashion trends" (Joy et al. 2012, p. 273). It is commonly used to describe how designs are adapted very quickly from catwalk to the mass-retailing market (Tokatli 2008; Cline 2012; LeBlanc 2012; Moon 2014). Similarly, in most of the interviews, fast fashion was often associated with copying.

Even though copying is not approved by some, it does not always have a negative standpoint. Fast fashion retailers and brands such as Zara and H&M have changed the way we dress and they influence fashion throughout the world. People

started to pay more attention to dress fashionably and being able to wear fashionable clothes have increased self satisfaction of many (Merchandiser, male, 35).

For something to become fashion, it needs to be used by many. In this respect, copying is important. Something that has become fashion is something that has been copied and reproduced. Copying is not copying as is. It is interpreting. This is what constitutes fashion. The fast fashion retailers and big global brands that do mass production follow and interpret the catwalks. Brands that did not even exist 30 years ago grew along with fast fashion brands. Trends, catwalks, and big brands started to spread to whole world. They enabled fashion to become known by many. Many people who cannot afford to buy expensive fashion brands started to follow fashion thanks to this copying and interpretation. This also enhances self-satisfaction. For instance, Zara has become a global brand that spreads fashion to even remote parts of the world. 10 or 20 years ago no one used to know the Zara brand. If you ask someone in Izmir today which brand they like best, most will say they follow Zara (Merchandiser, male, 35).

Fashion cannot survive without being trendy as it is difficult for something to become fashion without becoming popular and trendy (Assistant Consultant, male, 30s; Academic Director, female, 42). In this regard, copying is important because for something to become a trend and a fashion, it needs to be used by many and copying enables the use of masses. Something that has become fashion is something that has been copied, interpreted, adapted, and reproduced. Consequently, copying helps to democratize fashion as well.

Furthermore, informants also stated that fast fashion retailers have become an inspiration for other retailers, designers, and consumers by offering good design. Inditex group, H&M, Topshop, Miss Selfridges, and Urban Outfitters are the most popular brands which are followed by designers for inspiration. The other retailers also follow and copy these fast fashion retailers and have similar designs and ranges in order to improve their sales. As a result, apart from enabling many people to wear fashionable items, fast fashion system, also helped high street brands to grow and catwalk trends to spread to whole world. New brands grew along with big fast fashion retailers as they enabled fashion to diffuse from catwalks to high street.

Zara has a leading role in this regard. Meeting notes show that all the retailers want to know what Zara is buying or which designs Zara is interested in. 10 or 20 years ago hardly anyone knew the Zara brand but now it is the first name that comes to mind and to follow. Many are studying how Zara is managing this imitation process. There are even thesis studies on its success. Eventually this successful fast fashion retailer has become an inspiration for other brands.

Big fast fashion retailers like H&M and Zara open 500 to 600 new stores every year. And these big retailers grow in 25 to 30 countries which gives them the power to become the trend setters (Owner, male, 57). The rest follow by copying and imitating. For instance, in the film *The Devil Wears Prada*, Miranda Priestly (Meryl Streep) stated that the turquoise color was first used by one designer and then eight designers followed the trend. Eventually it became a mass trend and everyone started wearing turquoise sweaters. There is a domino effect in fashion industry. If something is successful then everyone will follow the trend (Assistant Consultant, male, 30s). Copying and imitation help to serve this purpose.

I serve in duplication and imitation of fashion. I send latest photos and samples and help the suppliers to develop fashion items. Ten years ago a Greek guy told me that he is doing this as a business which I found very clever at the time. At that time Turkey was not selling any design. He knew the Swedish buyers and any new trend that Topshop sells he used to send over to them and they developed those styles. 15 years ago this was believed to be extreme and very clever. At the end, fashion is something that everyone interprets differently according to their customer. There are not many themes and same themes are often repeated every two years. For instance, ethnic trend which was interpreted with orange and brown colors two years ago is being repeated with neon colors this year. Skulls became modernized. Whoever interprets these trends better, whether be it the manufacturers or the retailers, they can sell more. If the retailers interpret it better they have more customers and sales. If the manufacturers interpret it well and quickly they have more orders. It involves taste and aesthetics which everyone cannot do well (Product developer, female, 41).

Consequently copying and interpretation are parts of the daily jobs, especially of the designers and actors working on product development. Almost everyone copies the same catwalk images, designers, and trends. For instance, for Autumn

Winter 2013-2014, the most copied and referred designers were Isabel Marrant and Philip Lim. Philip Lim's embossed eagle was in every retailer's mood board. Same thing was true for Kenzo's tiger in Spring Summer 2013. However, the interpretations differed.

One of the informants described fashion as something that everyone interprets differently according to their customer. However, all the brands and companies cannot do this interpretation well. At the end, whoever interprets the catwalks and trends better and quicker has more business. This is valid both for the manufacturers and the retailers (Product developer, female, 41). For example, Zara has garments in store almost at the same time as the catwalks, which is the main reason behind its success. Therefore, copying and interpretation has an important role in economic success of fashion companies.

...A world in which creativity is like people don't care about the real thing. All people care about is as long as they have a good copy that is fine...It is crazy. This is where it is a real mess. If you go to Japan it is really interesting because in Japan copying is not acceptable. For example, if people get caught with a fake they cannot take it out of the country. In the airport they have a glass case full of counterfeit goods that they have seized at the airport. In Japan if people buy a pair of Comptoir de Cotonniers trousers then they buy a real pair of Comptoir de Cotonniers, they don't buy a fake! There is some sort of value in the thing itself not just in something that looks like the thing. We need to get this attitude back. If a person cares about fashion that is frustrating because I hear people talking about democracy and why a fashion shouldn't be available to me? Lots of people who don't have any money invest in fashion because they genuinely care about it. This isn't what most people want. It is just to be able to look like a thing that they have seen on a celebrity or on TV, without having to really pay for the thing itself (Business and Research Manager, male, 40s).

On the other hand, copying has negative outcomes as well. Copying current trendy designs and offering them at cheap prices undermines the value of fashion and design. People no longer care about owning the real thing. They care about having a good copy of something that looks like the original thing. People need to start valuing original design and creativity if they genuinely care for fashion.

In the meeting and field notes it was addressed that, every retailer wants to copy and imitate Zara but the Zara look and system may not work for all retailers. Companies need to adapt the trends and the styles according to their own target customer profiles. Furthermore, copy right issues are important. Designers need to be inspired not copy as is. The Academic Director of a Fashion Institute stated that she tries to teach her students to have a different perspective than copying. However, it is difficult to protest all the retailers, manufacturers, and designers who copy, as so many of them are part of the imitation process (Academic Director, female, 42).

Designers who work for fast fashion brands, retailers, and suppliers often do not create anything from scratch. Everyone is influenced from each other. As a consequence of all the copying and imitation identical or similar clothing items are offered in most stores. As a result, most of the brands are replicas of each other, lacking uniqueness and originality. Therefore, people who dress from fast fashion retailers may end up looking similar as everyone is wearing the same things from the same stores (Designer, female, 28).

When I go to Topshop and go downstairs, I see all the vintage stuff. They could actually sell this but they are not willing to spend the time and energy to really look at their own business model because they have told themselves that they as a brand are all about providing new fashion; they are all about being on trend; and they are all about copying catwalks. However, when we look at the catwalks of five years ago, everything on the catwalks today has probably been done five years ago (Business and Research Manager, male, 40s).

Furthermore, the most popular fast fashion brands concentrate on providing new fashion; being on trend; and copying catwalks. However, there are no big fashion statements anymore. The same catwalk images and trends are constantly repeated with little changes. It seems like trends are changing but same trends and styles keep coming back (Product developer, female, 41). As a result, apart from technological developments, currently there is no real innovation or big changes in fashion (Merchandiser, male, 42).

... It is difficult to make original clothes. There are copyright issues but it is difficult to get a copyright for a white shirt. Two years ago, one of our students got accepted to a London college with a collection. Recently our director told that Martin Margiela's last collection is similar to hers. It is not possible for him to copy her or get inspired from her. He has a certain style and has been doing this for 20 years. Our designer may have gotten inspired from his prior collections and he probably is influenced by his own earlier collections, so the two collections end up looking similar. It is very difficult to track the copying. They often call it being inspired. If designers want to be completely innovative than they need to work with a big team (Academic Director, female, 42). (The rest of the quote is related to designers as initiators of change.)

It has become difficult to make original clothes because of the copying and imitation. There are copyright issues. However, designers may be inspired from each other or from the same catwalks or images. As a result, the designs may end up looking similar to each other and it is hard to trace the origins. They often call the process being inspired rather than copying. Consequently, the supposed variety offered in the global market is artificial newness rather than diversity nor originality. Cline (2012) and Biehl-Missal (2013) also criticize this "painfully simple designs" and "self-degrading styling" provided through unsustainable production of global fast-fashion retailers.

Everybody looks like clones and the only people who are noticed are my age. We are so conformist, nobody is thinking...We have been trained to be consumers and we are all consuming far too much...In history people dressed much better than we do today. People have never looked as ugly as they do today regarding their dress (Vivienne Westwood, from an article by Thomas 2012).

The British designer Vivienne Westwood also argues that the modern day is the worst period in the history of style. She criticizes that, the rise of disposable fashion is making all the people look the same and the clothes have never been so ugly (Thomas 2012). Pears's (2006) findings further reveal that people started to become dissatisfied with the range of fashion garments available, homogenization of

design, and low quality of products, which are discussed further in the following section on changes in consumers' expectations of design and aesthetics.

5.3.4 Changes in Consumers' Expectations of Design

Even though my dissertation focuses on the institutional side of fashion, I would like to briefly talk about the changes in consumers' expectations and shopping habits. Understanding the changes in consumers' perspective of design and aesthetics is important to assess the role aesthetics and design play in transition of the fashion system.

In a recent New York Times article, trend experts and style leaders indicate that trends are losing their influence. Due to internet, consumers have access to so much style information that instead of imitating the passing trends, they have started to have confidence in their own personal tastes. Therefore, it is possible that in the future consumers will start demanding higher quality items with more individuality (LeBlanc 2012). In this respect, aesthetics can be used to make a difference as it can provide means to resolve homogenization of design and artificial newness, which is discussed further in the remedies section.

Similarly, other secondary data also shows that consumers started to get fed up with garments and shoes that are falling apart and that don't last. They are now prioritizing quality over quantity and are in search of handmade traditional items and textiles, which last longer and wear better than fast fashion garments. Consequently, there is a growing interest for traditionally made fabrics, as part of the slow fashion effect (Styles 2015).

Furthermore, prior literature states that consumers who are disappointed with mindless fashion consumption and its impacts are now motivated to support sustainable fashion practices (Beard 2008). They can break the fast fashion cycle by supporting innovative sustainable designers and retailers, returning to custom clothing, and refashioning, mending, and even making clothes themselves (Cline 2012).

Compared to few years ago, I prefer to buy garments that are treated differently or are hand-made. It adds value and power. I can think like I am wearing something more special and unique rather than something that any fast fashion retailer sells that everyone is wearing (Designer, female, 28).

Even though the interviews were conducted with informants working on the institutional side of fashion, they are all consumers of fashion as well. The analysis of these interviews indicates that there are changes in shopping habits. Rather than buying many items from fast fashion retailers that look similar to each other, some of the informants now prefer to buy fewer garments that are unique and different. In this case, desire for uniqueness and to be different overtakes desire for new and passion for shopping.

I try to follow fashion because I like to but I am not very fashionable. I do not always wear the latest trends. Sometimes I buy second-hand clothes from second-hand shops because I really like them. It does not have to be the last trend all the time (Designer, female, 28).

Most of the informants interviewed follow the catwalks and trends for work but in their personal lives they may get bored of following fashion all the time. They do not always wear the latest trends. Instead, some prefer to wear functional and comfortable clothes or buy second-hand clothes because they really like them. As a result, boredom arising from following fashion for work results in preferring comfort over trendy in their personal lives.

Fashion is not important for me. I used to like window-shopping and looking at magazines but now I do not even look at the magazines that I send to the suppliers. I look at so many stores for work I think I get fed up. It is hard to believe that I have Vogue and Harpers Bazaar at home and I do not even care to have a quick look at them. Maybe it is because I get tired of it as I do it for work. It also does not make sense anymore. My priorities in life changed. Buying a 300 dollar pair of jeans is not important anymore. Going on holiday with my family is much more important. Fashion and clothes are no longer my priorities. I always found it hard to understand how people prefer to spend all their money on clothes rather than going out with their friends for a meal. However, I used to spend more on clothes, which I stopped doing now. I buy only when it gets old. Of course I do not want to look or dress bad but I do not have to wear high fashion items all the time. Having many

things in my wardrobe does not make me happy or satisfy me anymore (Product Developer, female, 41).

Informants stop following the trends in personal lives, as it becomes tedious to follow fashion for work all the time, as mentioned above. One of the informants stated that she started to make more rational shopping decisions. For instance, she prefers to buy only few basic nice things that can be used in a multifunctional way; that she can combine and wear in different ways, which she calls "lifesavers." She started buying new things when what she owns get old. This does not mean that she dresses or looks bad. She just does not feel the urge to wear the high fashion items or latest trends anymore (Product Developer, female, 41). Similarly, other informants who work in the industry also address that they often shop when they need something and prefer to buy functional, easy to care items rather than trendy styles (Sales Manager, female, 41). Consequently, they started to take control of their desire for change and their shopping behavior.

Fashion is not necessary for someone at my age (41!). I put myself in my niece's place. She is a teenager and when I was at her age I also cared. It is related to age and also to satisfaction. Friends and society we live in also have an influence. If I was living in Turkey, I would have paid more attention. People here don't care (small town in UK). I made more effort today but when I go to school to pick up my kids I do not even dress like this (She is wearing jeans, a plain black top, Campers and a cream trench coat!). I would wear more casual jacket and shoes. It depends on the people around us. We act like them. If they do not care we don't care as well. Not going out in the evenings and not working outside in an office are important as well. People need to pay more attention when they go to work. However, I think I am exaggerating a bit because even when my friends come over I do not pay much attention. I welcome them with sweat pants on. Actually it is in a way rude but I want to be relaxed. I need to pay more attention and care more (Product Developer, female, 41).

Findings show that fashion can also lose its priority in people's personal lives, as a result of changes in lifestyles. Fashion and clothing are no longer priorities when people are satisfied with other nonmaterial things in life such as their children and

family. Desire for shopping often decreases as people become more satisfied with their lives and as they learn to be satisfied with fewer items. View of fashion and shopping habits also change with changes in age and the society we live in. Our friends and the lifestyles of people around us influence if we care for the latest fashion trends and designs.

Simplicity is so much easier. If we do consumer research and examine if people are actually enjoying their shopping, we will probably find that if we put people into a space where there are neat and beautifully centered things for them to buy from, they immediately associate it with something that is better and of higher quality. Whereas, the sort of philosophy that goes with high street retailers is to throw as much to people as possible and assume that they will buy something, which is true. We kind of get bombarded and think that I got to buy something. It is like a jungle sale (Business and Research Manager, male, 40s).

As a lifestyle, simplicity is much easier, as some of the informants addressed previously. People associate simple and neat design with higher quality. On the other hand, high street retailers are based on the philosophy of bombarding people with cheap goods so that they will buy more. In this regard, neat and simple design and aesthetics can be remedies to protect oneself from cheap design of fast fashion retailers. Consequently, aesthetics and design have an important role in changing the way we make, buy, wear, and discuss fashion, which is examined in the next section.

5.3.5 Association of Design, Aesthetics, and Sustainability

What we do with fashion and textiles matters beyond how we look. We cannot be well-dressed at the expense of our environment (Denmark's minister of environment, from an article by Chua April 28, 2015).

Marketing instruments use aesthetic means and design to increase consumption (Biehl-Missal 2013). Therefore design is not all that innocent. Denmark's minister of environment stated that the textile industry is one of the most resource-consuming sectors in the world. She noted that a Nordic citizen's annual consumption of textiles uses more water than a family of three in one year. However,

people cannot be well-dressed at the expense of the environment. Consequently, Nordic Countries launch an action plan for Sustainable Fashion. The European Union Eco Design Directive states that, 80 percent of a product's environmental impact arises from choices made during the design phase. Therefore, the design industry has the opportunity to minimize the footprint of textiles, which requires rethinking the way we design, produce, market, care for, and circulate textiles (Chua April 28, 2015).

Aesthetics and design can either become a barrier or a driving factor in transition of the fashion system to become more sustainable. Prior literature addresses that aesthetics can actually play a key role in this transition (Joy et. al. 2012), as it provides means to resolve homogenization of design and artificial newness. The British designer Vivienne Westwood advises the customers to "buy less, choose well, and make it last" (Frankel 2012). Aesthetics can be used to make a difference and fill the "mental and spiritual emptiness," which is one of the main critiques of the mass-market fashion industry (Biehl-Missal 2013).

However, aesthetics have not been successfully employed in promoting sustainable fashion. Design is a crucial factor that influences the appeal of eco-fashion (Joy et al. 2012). However, manufacturers, designers, and retailers are not truly aware of what consumers expect from eco-fashion (Niinimäki 2010). Unfortunately, style, quality, color, and compatibility with wardrobe often act as barriers to popularity of eco-fashion. Furthermore, sustainable and ecological designs are mostly found aesthetically dull and ugly.

As a result, the current eco-fashion and ethical clothing appeal only to certain groups of consumers (Niinimäki 2010). For instance, eco-fashion has been often associated with hippie and environmental movements (Welters 2008). On the other hand, Winge (2008) distinguishes between eco-dress and eco-fashion, arguing that the former is associated with the hippie movement, whereas the latter signifies luxury and refined taste, taking into consideration the aesthetic aspect. However, if eco-fashion is only associated with luxury, then it will remain limited to a small group of wealthy consumers, as addressed in the affordability section.

If a company is producing a lot of garments that are unwanted by the market, then they have a heavy footprint on resources in vain.... We need to make sustainability fashionable and fashion sustainable; it goes hand in hand (Pierre Börjesson, H&M's senior sustainability specialist, from an article by Hyslop 2014).

Generally ethical brands are not considered as high fashion. However, eco doesn't mean we have to sacrifice quality, comfort, and beauty. People care about aesthetics. They don't want to look bad. Therefore, it is important to keep eco and sustainable products beautiful. Similarly, Pierre Börjesson, H&M's senior sustainability specialist, stresses the need to produce the right styles with green credentials.

There are labels that actually make dressing in an environmentally conscious way fashionable. However, most of the consumers are not aware of these eco-friendly labels, even when they are carried by their favorite stores. Collections such as ASOS Reclaimed, Conscious Exclusive at H&M, Urban Renewal by Urban Outfitters, and Topshop's Reclaim to Wear eco-friendly lines show that stylish fashion design is possible with eco materials (Meepos 2014).

Furthermore, ethical fashion blogs also show that it is possible to look great without compromising on ethics. As blogs are the new magazines, they can also help to create awareness of social and environmental impacts of fashion industry and promote ethical and sustainable fashion. Some of these blogs are about sustainable lifestyles, aiming to show how it is possible to live a sustainable lifestyle without compromising on style and aesthetics. Examples of these blogs are: Bexceptional (ethical fashion, beauty, and lifestyle blog); Moral Fibres (UK based sustainable lifestyle blog); Eco Chick (US based ethical fashion blog covering fashion, beauty, art and home); Green Glitter (blog with news, reviews and posts about eco living and fashion); The Last Straggler (shows how we can all be both stylish and responsible); Green Stilettos (stylishly conscious blog that makes green glamorous); Dimples Diaries (combines great style with sustainable and ethical fashion); The Ethical Hedonist (luxury online magazine that puts the wow factor into going organic, local, artisan and sustainable).

There are also blogs that provide guidelines to keep up with all the major sustainable developments, collections, and initiatives in the fashion industry, such as:

The Green Eye of Fashion (ethical fashion directory and commentary on the issues affecting the fashion industry); Vogue - The Green Style Blog (keeps up with all the major sustainable developments, collections and initiatives in the fashion industry); Oxfam Fashion Blog (includes DIY tutorials, vintage shopping and style tips); Made to Travel (New York based blog about ethical shopping); Sadies Wardrobe (features an ethical fashion guide to Paris, outfit, and DIY ideas); Ecouterre (covers news about ethical fashion design); Ecosalon (combines posts on conscious culture and sustainable fashion, including ethical retailers, updates, and previews of new designers and collections); Ms Wandas Wardrobe (latest news on ethics in the fashion industry); Style and the Start Up (covers sustainability, style, and start ups); The Conscious Collective (features edits of the season's latest collections with a strong focus on ethical and sustainable brands).

Well aesthetics is everything. I mean it can't be aesthetically less because it is sustainable that is just ridiculous. I mean no one is ever going to go "oh that beautiful Acne blouse there that I am not going to buy because this one which is really boring is sustainable." This is not how people find fashion. It is got to be "I love Acne. What they do is amazing and I also trust them. I think they are a great brand and they really work in a sustainable way" (Business and research manager, male, 40s).

Some of the informants also addressed the importance of aesthetics for sustainable products. No one will buy something boring but sustainable because the only justification for clothing is not function or utility. Clothes should also be desirable and pleasurable (Wilson 1985). Therefore, sustainable products should have an aesthetic appeal to be desired by consumers.

Similarly, in one of the interviews, C.L.A.S.S. was given as an example to show the importance of design and aesthetics for sustainable products (Designer, female, 30s). C.L.A.S.S. (Creativity Lifestyle and Sustainable Synergy) is a multi-platform worldwide network based in Italy, which offers exclusive fashion, textiles, and materials created using smarter sustainable technology for designers, buyers, media, and business. In 2012, C.L.A.S.S. joined with The Green Carpet Challenge (GCC) to create the first "Green Carpet Challenge Fabric Library." The Green Carpet

Challenge is a project founded by Livia Firth and British journalist Lucy Siegle. It pairs glamour and ethics to raise the profile of sustainable style at the world's most high profile red carpet events, which is discussed further in section on sustainable fashion practices.

People care about the end product. Sustainable and eco products are mostly boring, ugly, beige t-shirts. Products need to be appealing and desirable because at the end it is fashion. Only being ecologic is not enough. People do not care. If we can combine the two -aesthetic and ecologic- then we can sell and it can become sustainable (Designer, female, 30s).

Need to make beautiful and good products at the same time. The products need to be appealing; and attract and excite people, as it is fashion. They need to create a desire to consume. However, the way we make them is important. People need to be aware that the products are made in a sustainable or ecological way so that it will strengthen their connection. They need to fall in love with the product and want to marry it (Designer, female, 30s).

Fashion collections need to be designed and manufactured in a sustainable and an ecological way but at the same time they need to be desirable and attractive. People need to fall in love with the end product. As a result, to be able to sell sustainable products, designers and companies need to pay attention to aesthetics.

5.3.6 Summary of Conflicting Perspectives on Design and Aesthetics

In meetings and interviews, offering aesthetically beautiful products, which reflect latest fashion trends, was found critical for success of both retailers and manufacturers, to have more business and in gaining competitive advantage. However, with rise of fast fashion, creativity has been replaced with copying, which has become an important part of the current design process. There are conflicting views on outcomes of copying.

Copying helps many to follow fashion, enabling trends to diffuse globally. It facilitates democratizing fashion by facilitating the use of masses. Copying also makes it possible for new brands to develop, as successful fast fashion retailers have become an inspiration for other brands. On the other hand, copying current trendy designs and offering them at cheap prices undermines the value of fashion and

design. As a consequence of all the imitation, most brands and styles are replicas of each other, lacking uniqueness. Consequently, homogenization of design and artificial newness has taken the place of creativity, diversity, and originality within the fast fashion system.

Aesthetics and design can become important change agents in resolving some of the negative outcomes of copying. However, they have not been successfully employed in promoting sustainable fashion. As a result, aesthetics is an important part of fashion and it can either become a barrier or a driving factor in mobilization of sustainable fashion. The other barriers and triggers of market emergence and mobilization are discussed in the next section.

5.4 Barriers and Driving Factors

The barriers and triggers associated with the main characteristics of the industry -speed, affordability, and design- are discussed in detail in previous sections. In this section, I introduce other driving factors that mobilize actors to seek market change and barriers in market formation and mobilization.

5.4.1 Barriers in Mobilization of Sustainable Fashion

There are many barriers that hinder the mobilization of a sustainable fashion market. Some of these barriers are addressed in sections on speed, affordability, and aesthetics. To summarize, speed and affordability enable the companies to generate more business leading to economic growth. Speed of availability and accessibility of affordable products also help to fulfill consumers' desire for new and lead to diffusion, and democratization of fashion.

Furthermore, copying, which is an inherent part of the current design process, also facilitates democratization of fashion by enabling the use of masses. Consequently, greed for economic growth and desire for new often override sustainability goals, thereby becoming barriers to sustainable fashion. Moreover, aesthetics is important in increasing the appeal of sustainable fashion, which has not been applied skillfully so far, becoming a barrier to its mobilization.

There are other important barriers to sustainable fashion as well such as: lack of trust in the institutions and products; lack of knowledge, awareness, and legitimacy; globalization and lack of transparency; and paradox between fashion and

sustainability. In this section I give an overview of these other barriers to sustainable fashion.

5.4.1.1 Lack of Trust in Institutions and Products

According to the findings, lack of trust in the institutions and products is one of the barriers to a more sustainable fashion system. Prior literature also shows that sustainable products are often perceived to be unreliable and there are negative inferences about their functional performance (Williams and Dair 2007; Luchs et al. 2010). Ambiguous and contradictory messages can lead to confusion about the social and environmental consequences of purchases, resulting in consumer distrust (Young et al. 2010). This lack of trust in the institution or product and skepticism of firms' environmental claims often prevent people from acting pro-environmentally or from choosing sustainable products and lifestyles (Bonini and Oppenheim 2008; Niinimäki 2010; Joy et al. 2012).

One problem in this area is confusing and inadequate logos and labeling, such as the misleading use of "organic" or "better cotton" terms by fashion retailers. There is an increasing interest to use organic and better cotton among retailers. However, even if the label says organic, they may only use a small percentage of organic cotton, which is often considered as green washing (Consultant, male, 30s). This lack of transparency and misleading use of information often leads to uncertainty and lack of trust (Vermeir and Verbeke 2006). As a consequence, only a small percentage of consumers fully trust labeling and product information (Hobson 2004). Therefore, the presence of sustainability labels by themselves may not be sufficient, as lack of trust and confusion over their meanings often reduce their effectiveness (Thøgersen 2005). On the other hand, all the labels are not misleading and they are still helpful in creating awareness and association (Business and research manager, male, 40s).

Conscious collections of H&M and M&S are important to create awareness but considering the structure and size of H&M these actions are so small. They have stores all around the world. They have a lot of manufacturers in Turkey and they consider Turkey as a big and important market. However, they had other worries when opening the first store in Istanbul. In Shanghai they can sell 2000 pieces of one t-shirt in one day. The sales increase even more during the weekend. They don't want to invest in a store in Istanbul if they will not be able to reach one million pieces in

one month. As a result they profit from fast fashion. There is a system based on consumption which is the reality and it is hard to believe that they try to build awareness with a small sub brand or collection they create within their business. However, still everything is a step and every little step helps to build awareness but I am not sure about the total effect (Academic director, female, 42).

... Best practice wise, I struggle with this to be honest because big brands like H&M has done some good work on making sustainability a kind of core part of their work but the reality is that they are a fast fashion brand and they absolutely promote that kind of shopping as a cultural and social activity. Even when we look at their sustainability fashion range such as conscious collection, marketing has such an odd relationship to it because "more sustainable fashion" is such weird way of marketing. Because are they saying more sustainable as in more sustainable than other fashion items or more sustainable as in buy more of this because it is sustainable? It is clever marketing but all of this subliminal messaging is saying "this is good we can buy more" (Business and research manager, male, 40s).

Another issue is lack of trust in the institutions and skepticism of firms' environmental and sustainability claims. Although some fast fashion retailers have started actions in the name of sustainability and implementing an environmental strategy, there is suspicion that these are mainly done to avoid public scrutiny, disciplinary gaze, and in order to prevent potential economic losses. The reality is that they are fast fashion brands and they promote shopping as a cultural and social activity. They profit from the current fast fashion system, which is based on consumption. Therefore, most people find it hard to believe that fast fashion retailers try to build awareness with a small sub brand or a collection that they create within their business. They are more likely to take advantage of people's interest in ecological and organic products. Consequently, sustainable fashion practices, such as launching "Conscious Collection" lines, become another business opportunity or a sub-business for fashion marketers.

It is a small capsule collection launched once a year for a short period of time. It is displayed in a separate location in store. It is a small collection and it is not displayed for a long time in store. I do not think its sales are well since people really do not care and are not really interested in this collection. It is mainly for publicity.

However, we should also not underestimate the small improvements. H&M has a target to use more organic cotton every year and it has strict code of conduct procedures. These are important steps in improving the process and in training people. Even if people do not care we can train people. In this regard, retailers and manufacturers have an important role in improving things little by little. I hope that sustainable fashion is the future of fashion. People will continue to buy fashion. Therefore, it is important that at least it can be done in more ethical and environmental friendly ways (Product developer, female, 30s).

Similarly, most of the informants think that organic products, conscious collections, and similar campaigns of big fashion retailers are used mainly as marketing tools and for commercial reasons, and publicity. Consumers are often not interested in these collections as they do not feel genuine and they do not fit in with all the other fast fashion products in the store. On the other hand, it is still important to consider the impacts of small improvements, such as code of conducts, standards, and targets to increase use of organic cotton, in creating awareness and in educating people.

Giesler and Veresiu's (2014) argument in one of their recent papers can be used to explain the lack of trust on the consumer side. They state that responsible consumption shifts responsibility for big problems to consumers, leaving corporations free to continue as usual. Instead of implementing policy changes to solve environmental and social problems, businesses create new markets that encourage responsible consumption, putting all the pressure on the consumers to solve the problems. Therefore, the new markets and products are created for consumers to keep consuming without feeling guilty (Giesler and Veresiu 2014). Consequently, fast fashion brands are often criticized for investing in sustainability initiatives to strengthen their customer offers, rather than genuinely integrating sustainability to their business model or creating their products more sustainably for their consumers (Chandak 2014).

Similarly, Hulsether (2014) states that "conscious" businesses, such as TOMS Shoes, hide the material realities of their business models behind benevolent consumption. Companies have learned that linking their products to charitable causes and social action makes for good business. People no longer buy only what they

need. They buy what makes them feel like good people and what makes them part of a good community. According to Hulsether (2014), this is the new transformed meaning of consumer spending and companies are taking advantage of this new meaning of consumption. Consequently, "conscious capitalism," coined by Whole Foods CEO John Mackey, has become the new business model which assumes that "the best way to maximize profits over the long-term is to orient business toward a higher purpose" (Hulsether 2014). Therefore, it is difficult for consumers to know the real intentions behind firms' sustainability efforts, which leads to suspicion and lack of trust.

Furthermore, there is lack of trust in sustainable products and their performance. This negative perception needs to change if retailers want to promote sustainable fashion (Sales manager, female, 41). For instance, when second-hand stores made its debut in Turkey, people opposed the idea. Most did not want to wear someone else's clothes as they did not trust the hygiene. However, as they see others wearing second-hand garments and when they started finding nice things, their mistrust started to decrease and more people started to buy second-hand clothes (Assistant consultant, female, 30s).

If we look at this country, second-hand and vintage fashion has become quite acceptable, not across the board but in a lot of areas. In poverished areas, there is still a lot of negative association to second-hand clothing because it is associated with having no money and being impoverished. Therefore, people wear something new because it is a statement that they have got some money. The reality is that because we have become a relatively affluent society across the board, according to the last statistics I read, there is about 30 percent rise in investment in second-hand goods. This is indicative of people saying "why am I spending on something new when there is something really good already" (Business and research manager, male, 40s).

The situation is different in more affluent Western societies. For instance in UK, second-hand and vintage fashion has become quite acceptable and the percentage of people wearing second-hand clothes is increasing. However, there is still a negative perception, especially in deprived areas, because it is associated with

having no money and being impoverished. Therefore, people wear something new not because they do not trust the second-hand clothes but because it is a statement to show that they have got some money.

I have heard of recycled clothes but I have not seen a real example of a recycled product. How are they recycling the clothes? How are they making the yarn? If they break it up than the fibers will be broken and how are they putting it back together again? How are they weaving it? It seems impossible to me...I do not find it realistic. I do not think it will develop or increase. It is similar to ecological cotton, which became a trend at one point. Everyone has done it; put it in its store and now it is over. Now we hardly see any organic cotton products. Actually it says organic on the label but it s not even real organic. They take organic cotton and then dye it with toxic hazardous chemicals and sell it to people as an organic t-shirt. This is not organic. It is only a lie. Now, no one cares about organic cotton any more. Recycled clothes will become like this as well. No one will care. People do not care about the environmental consequences. I think they are all marketing tools (Merchandiser, male, 42).

...I do not believe in having everything organic as there are firms that earn money from this. I do not believe that this has major benefits for the world, society or environment. They are dyed in same dye baths and they use the same water. Only using organic cotton will not make such a difference. Actually the whole system needs to be organic. However, it is not totally bad to start from some point (Owner, male, 57). (Rest of the quote is used related to speed and future prospects.)

Some of the informants do not completely trust the recycled products and the recycling process. They believe that having a truly recycled product is not as easy as described, just like having a fully organic process or a 100 percent organic product. Therefore, some believe that interest in recycled products is a passing trend similar to the interest in organic cotton because people do not really care about environmental consequences or whether the products they buy are made of recycled or organic materials.

Couple of years ago formaldehyde was found in one of our orders for a UK retailer. Normally they should not have accepted an order with formaldehyde, as it is

dangerous for kids. However, instead they have told us that they will have the order but we will be fined as the goods have formaldehyde. We could not believe and told them that we can ship the goods but we can also easily announce that this retailer has goods with formaldehyde in their stores. They immediately cancelled the fine and the order was rejected. We stopped working with this supplier after that incidence (Owner, male, 57).

Meeting notes also show that some retailers have double standards. For instance, they may have different audit standards in Turkey and in India, as the production conditions in India are really bad compared to Turkey but they still pass the tests. Moreover, if they are desperate to have goods in store, they may disregard some standards, even if it may lead to hazardous outcomes. These double standards also lead to lack of trust.

The consumers don't trust the companies because the companies haven't been trustworthy. Businesses now try to resolve this and ask "how do we actually reengage?" The marketing language that different businesses are using; the way that they talk to their customers; and the intimacy that they are trying to generate through their marketing campaigns is changing. Like Tesco tag line, "every little helps" it is now all about people and community. They are trying to become approachable. Because trust between brands and consumers is just not there. Naomi Klein wrote "No Logo" in the 90s about how marketing and advertising dominated our lives and told us who we should be and how we should behave. Actually in the last 10 to 15 years suddenly marketing has shifted and started to give a different message. It is no longer telling people who to be and how they should be better by consuming more. We have to start telling them now "trust us; be pertinent; and be grateful; we are investing in you and your community." It isn't because of people that brands want to do that. It is because there is no trust there. And if there is no trust then ultimately brand does not have any loyalty which is everything. Because brands need their core customers to believe in them. So best practice wise I don't think there is a single very large global brand that can say "what we do we do with integrity" (Business and research manager, male, 40s).

As a result, consumers often do not believe that the ethical and environmental concerns of retailers are genuine. There is lack of trust regarding the true motivations of brands implementing sustainability. There are now indexes that measure consumers' trust, which is an important signal and a warning for retailers. The businesses are now aware of this fact and they are trying to resolve this by building back that lost trust. Therefore, the aim of marketing has shifted in the last 10 to 15 years and the new marketing campaigns and messages aim at gaining back the trust between companies and consumers.

While numerous small companies sell genuinely fairtrade and ethical fashion products, it is the high street stores that have the real power to make a change. Tamsin Lejeune, managing director and founder of the Ethical Fashion Forum, which is one of the main industry organizations for sustainable fashion, also addresses that even if companies use phrases such as "sustainability", "fair practice" and "ethical" across store names and websites, it is difficult for consumers to find out which companies are trustworthy and which ones live up to their promises (Champ 2014).

Similarly, Hertzman, in his article in *Business of Fashion* states that to make any kind of progress, it's important to first understand the major dysfunction that currently exists in the garment sector. According to him, the major dysfunction is strong levels of distrust and misunderstanding (Hertzman 2014). Even though there are important developments, the sustainability movement requires more accountability from retailers.

Fast fashion can never be sustainable, no matter what companies say. Whether Persson (CEO of fast fashion retailer H&M) likes it or not, we live on a planet with finite resources. As Sarah Ditty (from Fashion Revolution, a UK-based organization dedicated to getting consumers to ask how our clothes are made) points out, millions of tons of clothes get dumped in landfills every year, and Africa is swamped with unwanted charity-shop clothes that are destroying local textile markets. Continuing and/or increasing consumption, even if it's in so-called "sustainable" ways, is not a responsible long-term solution for dealing with global poverty – and that poverty is only going to get worse from the environmental havoc wreaked by damaging industries such as garment-making (Martinko 2015).

On the other hand, there is still lack of trust that the fast fashion system based on continuous consumption can ever become sustainable. Some responsible fast fashion retailers like H&M care about creating a more sustainable business model by having "Conscious Collections" made of organic and ethically sourced textiles; a used garment collection service; and a zero-waste, closed-loop production model as its ultimate goal. The company is researching technology to turn more used garments into new ones. Although all these efforts are noteworthy, fast fashion companies are at the root cause of the problem. These companies have created a throwaway fashion model that has many negative consequences, which are not possible to avoid by maintaining current levels of consumption. Therefore, many are still suspicious of fast fashion brands' sustainability claims and efforts, and their true motivations. As addressed by Martinko (2015), these efforts are most often perceived as a "capitalistic call to keep shopping for more."

5.4.1.2 Lack of Knowledge, Awareness, and Legitimacy

Prior literature also shows that lack of knowledge, awareness, and consideration in sustainability issues often act as barriers (Kollmuss and Agyeman 2002; Thøgersen 2005; Vermeir and Verbeke 2006; Williams and Dair 2007; Bonini and Oppenheim 2008). Increased concern for the environment alone is often not sufficient; increased awareness of the relationship between technological, political, and economic institutions and environmental deterioration is also required (Kilbourne et al. 1997).

Sustainable fashion designers, brands, and retailers are increasing in number, and labels such as "ethical," "eco," "fair trade," "organic," "natural," "sweat-shop free," "recycled," "second-hand" or "vintage," are being used to persuade customers that the fashion products they purchase are environmentally friendly and ethically sound. However, in general, the consumer awareness of the impacts of fashion industry is quite low and sustainable fashion is still a niche market (Beard 2008). While steadily increasing, the number of ethical fashion supporters is still relatively low (Niinimäki 2010).

Similarly, majority of the informants interviewed have not heard of slow fashion or sustainable fashion. It is still a new concept in Turkey. There are also negative connotations of the word "slow." It is associated with laziness and being

boring. "Sustainable fashion" term is believed to describe the new philosophy better. Informants often associate sustainability with local designers, vintage, or second-hand. They usually relate it to the old times in textiles and to slower pace. Some believe it is associated with luxury fashion and expensive products with good quality that people can wear and use for longer. Whereas others relate it to organic and better cotton and to recycling. Generally, it is believed to be a more Westernized concept. Most consider it to be the opposite of fast fashion. However, overall there are mixed views on sustainability.

More than 90 percent of the people do not care about it. Very few know about the negative consequences; think about it; and try to do something (Designer, female, 30s).

Academics started talking about sustainable fashion at conferences and workshops in Turkey but the examples given are mainly from Western contexts and Northern Europe. Furthermore, most of the informants believe that neither the companies nor the consumers in Turkey are aware of the negative consequences of the fast fashion system. Most of the consumers do not know or care about the environmental and societal consequences of the clothes they consume. They are often not interested in recycled or organic clothes. Especially the younger generations, are not aware of the negative consequences of this continuous fashion consumption. In general, the public awareness is low. People do not know the carbon footprint of a t-shirt they buy; they are not aware of the process it goes through. Therefore, along with the companies, the consumers need to be trained as well, which is not an easy process (Owner, male, 57).

Moreover, even if people are aware of the consequences, they are not likely to change their habits. Prior literature states that lack of availability, accessibility, and affordability of sustainable product alternatives often make it difficult and inconvenient to adopt sustainable behaviors and lifestyles (Tanner and Kast 2003; Hobson 2004; Vermeir and Verbeke 2006). When consumers believe that they have restricted choices, they often take no action (Henry 2010; Scaraboto and Fischer 2013). They may ignore the environmental impacts or labor conditions, if being ethical or sustainable requires the investment of more time and effort (Eckhardt et al.

2010). Therefore, giving up everyday consumption practices that are driven by convenience and habit can be challenging.

Beşiktaş municipality actually picks clothes up from the address. I was surprised when I heard this. We had clothes that were left from the shopping event in REC. I searched back then what I could do with those clothes. I called the municipality and told them that we had clothes to donate. They came and picked the clothes up from the address. Actually the service exists but people do not know about it. Therefore, we need to create awareness and inform people (Consultant, female, 30s).

People are not even aware of the services provided to facilitate sustainability. For instance, some of the Turkish municipalities have a service that picks up donated clothes from the address. However, people are often unaware of these services. Therefore, some of the informants believe that companies and institutions need to come up with ways to create awareness, which will be addressed in remedies section (Sales manager, female, 41).

On the other hand, there are less pessimistic informants who believe that consumer awareness and consciousness is increasing. Especially with the rise of environmental crisis and catastrophes, people have become more conscious and aware. Particularly in Western countries, people personally feel responsible and act to protect the environment. They are also careful about what they buy and have started shopping in a more responsible manner.

...Consumer culture is dominant in the world. With rise of environmental crisis and catastrophes, people are becoming more aware. However, unfortunately this is not really valid for Turkey. People are more worried about and struggling with earning a living in Turkey so the social awareness is not strong. People, especially in big cities, need to become more conscious and aware. Actually, slow fashion is a philosophy that needs to become important in the coming years (Merchandiser, male, 35).

However, this is not the case in Turkey. People are more worried about and struggling with earning a living, so social awareness of issues such as sustainability is not as strong. Such issues are discussed mostly in developed countries. There is

lack of interest, especially in nonwestern and underdeveloped countries. Eventually, consumer awareness and interest to sustainable fashion products is still low in Turkey (Sales manager, female, 41). There are press releases and news on the topic, which help to create some interest, but these demands are not enough to create a movement (Designer, female, 30s).

Similarly, on the production side, the current initiatives to have a sustainable fashion system are negligible in Turkey, as there is not a big demand and desire to take such initiatives. There are many small firms and suppliers in Turkish textile industry and it is often difficult for these firms to spare funds for sustainability, especially if they are not corporate firms. These small and medium size enterprises often struggle to maintain their business and are worried about surviving. Therefore, sustainability does not become their major concern (Academic director, female, 42).

Similarly, one of the sustainability agencies I have talked to pointed out that they do not have any customers from the textile industry requiring consultancy on sustainable fashion. There are very few initiations, attempts or examples (Consultant, female, 30s). Firms with strong R&D departments are more likely to be interested in sustainability, such as the denim manufacturers. However, there are still very few people and companies working on the topic (Academic director, female, 42).

According to a research carried out in Ankara with 32 manufacturers, 60 percent of manufacturers researched do not do anything about textile waste. 50 to 60 percent of textile waste is not made use of and is thrown away to landfills, instead of giving it to workers to use. Even if the manufacturers are aware of sustainable fashion, hardly any of them take any steps or actions on the issue (Notes from International Art and Design Congress, October 2014).

On the other hand, results of a market research carried out in Turkish market show that consumer awareness is increasing. Even if it will take time for consumers to develop consciousness, it has started slowly. People started to check the clothing labels. The change will not be quick but it is important for the end consumers to develop awareness as it is difficult for the system to change unless people stop consuming all the time (Academic director, female, 42).

I do not think that H&M is doing these for the sake of doing. They created an amazing code of conduct system and they are very sensitive about it. Some fast fashion brands such as Zara are only gaining consciousness about these issues. They stress that the contract manufacturers they work with need to respect workers' social rights; not employ child labor; work within allowed hours of labor; and follow these requirements. Otherwise, they will be charged for not obeying the rules and even will be banned from being a supplier. The consciousness is increasing. Some fast fashion retailers are already fulfilling some of the requirements of sustainable fashion. Zara was looking into recycled fibers last year. We looked into recycled cotton. There are only few places that make recycled cotton, modal rayon etc. Their washing fastness is high and suitable for long term use. There are semi-synthetic fibers as well. These are big innovations. We will not be able to use natural materials for a long time. Therefore, it will be inevitable to use synthetic fibers. Semi-synthetic fibers are more user-friendly. They feel natural. As I am a textile engineer I know and pay attention to these issues but it is difficult for a regular customer to know this. It is important to educate and raise awareness of both the retailers and the consumers about these new developments. What is being done and for what reason... (Merchandiser, male, 35).

The consciousness of retailers is increasing as well. Some fast fashion retailers such as H&M are already fulfilling some of the requirements of sustainable fashion. Whereas others are only developing this consciousness. Meeting notes also show that there is an increase in interest to organic and better cotton among retailers. Some of the retailers even argue that in couple of years, all the products they have in their stores will be from organic or better cotton. However, they are still uncertain if there will be enough demand on the consumer side.

The small companies and actions have a massive impact in terms of visibility of these issues and to help people's engagement but it is critical to apply these actions to scale. Most people do not still know and understand the technological developments that the manufacturers undertake in this regard (Business and research manager, male, 40s). Therefore, it is important to educate and inform both the retailers and the consumers about the new developments (Merchandiser, male, 35).

Personal effort also depends on the motivation of individuals. Not everyone is equally motivated to change their lifestyle in a sustainable direction. Lack of

empowerment or lack of self efficacy regarding solving environmental and ethical problems are likely to decrease individual motivation (Thøgersen 2005). The legitimacy of consumers and other actors affect market dynamics. When consumers and institutional entrepreneurs lack legitimacy, resources, and power in mainstream markets, the pace of change in those markets may be slow, uneven or limited (Scaraboto and Fischer 2013). As a result, legitimacy, awareness, and knowledge of potential change agents are important for sustainable fashion market to emerge and to mobilize.

5.4.1.3 Globalization and Lack of Transparency

Over the past few decades the fashion industry has become highly globalized. Companies have moved most of their production to low-wage countries; brands are operating efficiently, producing large quantities at very low costs; and there is an abundance of fashion, available around the globe, in all price ranges. As a result of the advancements in global logistics, manufacturers use resources and labor from different countries. Resources, capital, and manufactured goods are transported all over the planet. However, rapid globalization of the world economy have led to establishment of the current system of cheap commodities based on exploiting of labor and natural resources (Schor and Holt 2000).

Prior literature shows that the globalized fashion industry supply chain has become highly fragmented, complex, and less transparent (Mihm 2010). Therefore, it is difficult to ensure that the system, including the supply of the components; the labor used to manufacture the garments; the transportation of the garments from factories to retail outlets; their aftercare and disposal, are according to ethical standards (Beard 2008).

Similarly, some of the informants addressed that with so many parts to the supply chain ensuring transparency is becoming incredibly difficult, as both the companies and the products have become global. For instance, Zara collects all the products in its warehouse in A Coruña and then distributes it from there to around 30 countries. They produce in Turkey; ship it to Spain; and then they send it back to Turkish stores. A garment's tag may name only one country but a brand with multiple offices across the world is likely to order trims from Hong Kong and fabric

from China, while getting the final garment stitched in Vietnam, Cambodia, Bangladesh or all of the above.

In the past, quota system was set up to prevent or limit the amount of textile and apparel imports to protect local businesses. However, this system also brought along some negative consequences such as leading to an increase in domestic manufacturing costs. When the quota system was eliminated in 2005 and replaced by a World Trade Organization agreement, manufacturing started to be outsourced to other countries. As a result of the movement to manufacture clothes abroad, consumers are no longer aware of the origin of their garments (Gonzalez February 19, 2015).

As a result, globalization process distanced the individual from the social and environmental consequences of the goods consumed. Most consumers are unaware of the negative effects of fast fashion consumption because of the remoteness between production and consumption and disconnection from resource origins (Vermeir and Verbeke 2006). They are not aware that the clothes they make, buy, wear, and discard are resource intensive, as they don't see the carbon or water footprints (Goodwin 2012). This disconnection from environmental and social consequences of consumption often act as barriers to sustainable consumption practices (Vermeir and Verbeke 2006; Oberthur 2009).

Globalized trade also has unintended consequences. Along with globalization, second-hand garment trade has become very popular as well. *T-Shirt Travels*, a documentary by Shantha Bloemen on second-hand clothes in Africa, shows the negative consequences of clothing donations. The film, released in 2001, explains how second-hand clothing, given away as charity, can have profound effects on developing countries. Bloemen traced the journey of second-hand clothing from New Jersey to Africa. She found that many of the villagers in Zambia wore second-hand clothes from America and the West and many people in the village made their living selling these used clothes (Mann and McGoldrick 2011).

Mark O'Donnell, spokesperson for Zambian Manufacturers, explained that in 1991, when the country's markets were opened to free trade, container loads of used clothing began to arrive in Zambia, undercutting the cost of the domestic manufacturers and putting them out of business. Today, there are almost no clothing

manufacturers left in the country, leaving the country with a huge amount of debt. Bloemen's investigation shows how American's and Western countries' donations to charity end up harming garment manufacturers and trade; bringing poverty to former Western colonies like Zambia; and killing their own textile business. According to Boshra (2003), this is like the new "economic colonialism" that's the by-product of increasingly globalized trade (Mann and McGoldrick 2011).

Similar to *T-Shirt Travels*, but this time following a pair of jeans, in *Clothing Poverty*, Andrew Brooks exposes the hidden sides of fashion, revealing how fast fashion and clothing recycling are interconnected and how recycled clothes are traded across continents. The book provides insights into how global system of fast fashion and second-hand clothing donations are connected with poverty in countries like Africa, revealing the inequalities and injustices that exist within the second-hand clothing trade and the manufacturing of garments (Brooks 2015). Apart from having negative consequences on developing countries, when there are too many clothing donations, items are turned into rags or end up in landfills, damaging the environment (Boboltz 2014).

Furthermore, with the globalization of the fashion system, transparency of the supply chains has become an important issue. Even brands that claim the highest ethical standards continue to withhold information about their suppliers and locations of their production units (Chua March 13, 2015). For bigger brands, making their supply chains transparent is even tougher because they need more information and the system is based on the information given by each supplier in the chain. On the other hand, supply chain transparency is critical to resolve the adverse effects of globalization. It is important for retailers and brands to become accountable and transparent for the fashion industry to become sustainable, which is discussed further in remedies section.

5.4.1.4 Paradox between Fashion and Sustainability

Fashion consumption and sustainability are often considered to be opposing concepts, as fashion system and institution are driven by speed, change, newness, obsolescence, disposable trends, and aesthetic fads. David Lipke, in *Women's Wear Daily* (31 March 2008), questioned if green fashion is an oxymoron and how can "an industry driven by disposable trends and aesthetic whims reconcile itself to an era of

conservation?" (Winge 2008). The characteristics of the industry and the barriers highlighted in this study help to respond to this question. Lack of association and paradox between fashion and sustainability is one of these barriers.

People buy organic food but they do not buy organic fashion. They do not associate organic with fashion (Designer, female, 28).

I fully intended to get up here and talk to people about language, specifically the language we use to discuss the ethics of clothing and how it is vague and unclear... It does not work for consumers, who have no idea, what we are talking about when we talk about eco this and ethical that... Sustainable fashion doesn't make any sense. It's a contradiction in terms. According to the Oxford Dictionary: Fashion is "the production and marketing of new styles of goods, especially clothing and cosmetics." Sustainable is "able to be maintained at a certain rate or level." On one hand we have the pressure to be new; on the other, the imperative to maintain. Sustainable fashion is an oxymoron... (Rickey May 1, 2014).

Unlike the association between organic and food, consumers are not likely to consider sustainability when purchasing clothing (Solomon and Rabolt 2004). Vanessa Friedman in her *Fashion Manifesto* explains that the main reason behind this problem is the unclear language, contradictory terms, and conflicting purposes. Consumers often find it difficult to understand what sustainable fashion, eco fashion, ethical fashion, or slow fashion mean. Even the definitions of fashion and sustainability contradict. The production and marketing of new styles and pressure to be new contradicts with imperative to maintain (Rickey May 1, 2014).

Orsola de Castro (2015), co-Founder of Fashion Revolution, also believes that one of the reasons why sustainable fashion hasn't been selling is its name. She thinks that "sustainable fashion" has become a very generic name, as it implies that all sustainable fashion designer brands fit into the same category and market segment, which actually is not the case. It is also insufficient in describing what sustainable fashion actually is and what it means.

The driving force of fashion today is planned obsolescence – something is in, then it is out; which is itself by definition about something that is the opposite of sustainable. And it's not just the aesthetics of the clothes themselves; it's the machinery that backs it up. Because in order to sell all these new clothes, there are

now new fashion collections coming out four times a year instead of two, and sometimes even more than four, so designers are effectively running on a creative treadmill that is unsustainable. No one can have that many new ideas. At least not ideas that are any good, or remotely original, or, frankly, worth buying... And to keep growing revenues and reaching customers, brands are opening more stores, an accumulation of outlets that at a certain point starts to cannibalize itself and is unsustainable. Everything the established fashion industry and the big fashion brands, does is predicated toward teaching consumers that they need the new and last season is the old, and this goes for high fashion and the high street. The cleaning costs more than the piece of clothing (Rickey May 1, 2014).

Nature of fast fashion and sustainability aims are often in conflict. Fashion is based on creating product obsolescence (Dardis 1974). As explained previously the current system is based on having new styles, new collections, new designs, new stores, new brands, all the time to impose on the consumers that they need something new, which is the opposite of sustainable. Consequently, this system based on speedy circulation of cheap products that lack quality and originality, is unsustainable. There is also incongruity between sustainability goals and practices of fast fashion retailers. On one hand, they are selling a tremendous amount of clothing in fast fashion and on the other hand they are trying to become a sustainable company, which is contradictory.

When it comes to sustainability, the core problem for fast-fashion companies is the business model. Sustainability efforts and reports often hide the unsustainable reality of fast fashion (Bain 2015). For instance, H&M released its annual sustainability report for 2014, in April. The report details how the company is implementing more eco-friendly practices to reduce the harm it causes the environment and its efforts on social welfare issues such as gender equality and poverty. However, even though H&M is one of the fast fashion retailers, who try the most to lessen the negative outcomes of fast fashion, fast fashion as a volume business is a strain on the planet.

...For example, just out of college, designers cut the patterns attentively because fabrics are expensive (zero waste); they reuse last season's leftovers and any

remnant they come across (upcycling); and they get their seamstress round the corner to sew them up (local production); then they can't afford more pattern-cutting so they tweak their old designs (classic, slow fashion); and they sew all night to finish their collection in time (artisanal, quality)... Much as I understand the need for standing out and declaring our point of difference and the importance of reiterating our social and environmental messaging as designers, I find it deeply tragic that the modern trend for mass consumption and overproduction has usurped values that are intrinsic to this craft, and we have had to rename it as "sustainable fashion" because the industry has grown so far away from those methods that it doesn't recognize them anymore (Orsola de Castro 2015).

Fashion was not an unsustainable business before. Orsola de Castro states that most of the young creative fashion designers started their career sustainably. Before fast fashion took over in the early 1980s, the young designers could expect to run a decent business operating from a local factory that would be mindful of its waste and energy use. She believes that mass consumption and overproduction of fashion has taken over the values which were inherent to the industry. Today the designers are trying to bring back these values by renaming it as sustainable fashion. However, the industry has grown away from its intrinsic values, which is the main problem (de Castro 2015).

Calling fashion "sustainable fashion" or "ethical fashion" is another marketing conspiracy and a deliberate trend to make people buy more; imposing them to discard quality, values, and design, in favor of cheap, available, and standardized. The "ethical fashion" and the "sustainable fashion" actually comply with what fashion really was and how it should be today. According to Orsola de Castro (2015) everything else is "unsustainable fashion" or "unethical fashion."

5.4.2 Driving Factors in Mobilization of Sustainable Fashion

Along with barriers, it is important to examine the driving mechanisms that shape the industry to become more sustainable. Some of these triggers are addressed in sections on speed, affordability, and aesthetics. Current speed of the fashion system increases stress, exhaustion, and conflict between actors. Continuing speed of economic growth as a result of offering latest designs at affordable prices, also leads to depletion of natural resources and increases disposability and waste. Fast cycle of

the fashion system started to give warning signals for retailers as well, such as over stock.

Affordability is associated with unhealthy working conditions and lack of quality, undermining the value of fashion. Furthermore, copying, which is an important part of the current design process, leads to homogenization of design, lack of creativity, diversity, and originality. To summarize, unhealthy working conditions, stress, and conflicts; depletion of natural resources; overstock; lack of quality, value, and originality, can all become driving factors that facilitate the emergence of a sustainable fashion market.

It is important to question how the industry can be shaped so that it becomes more sustainable. The driving mechanisms can be identified. Some of these driving mechanisms are increase of regulations; competitive advantage of the companies that produce green products; funding and incentives provided for sustainable production (Consultant, male, 30s).

There are also other driving factors that initiate the market formation such as protests and criticisms; enforcement of standards and code of conduct; and becoming a pioneer and gaining competitive advantage. In this section, I give an overview of these triggers of sustainable fashion.

5.4.2.1 Protests and Criticisms

Fast fashion has recently come under scrutiny due to its unethical working conditions, lack of waste management, increase in pollution, and exhaustion of resources. The absence of workers safety and environmental regulations has enabled the corporations to externalize the cost of fast fashion until the recent years (Khan 2014). However, with rise of environmental crisis and catastrophes, customer awareness and protests are increasing, especially in Europe and Western societies (Chandak 2014). These global actions against the damages caused by fashion industry have led to focus on sustainable fashion.

The recent collapse of the apparel manufacturing factory in Bangladesh, which killed more than 1,100 workers started a global discussion about human rights and fair labor practices in international apparel supply chains. Moreover, an increased awareness of the environmental implications of apparel

production and health risks related to use of toxic chemicals in production of clothes are also leading consumers to ask more questions about the origins and the production of the clothes they wear (Gonzalez January 5, 2015). Faced with all the protests and criticisms, retailers have no choice but to change their practices. Therefore, recently a new sustainable approach towards fashion has begun (Khan 2014).

If we continue to focus on profits, cheap prices, and fast fashion and if we do not change how we produce and consume fashion, the future will be disastrous (Tamsin Lejeune, Founder of Ethical Fashion Forum, from an article by Chandak 2014).

Tamsin Lejeune, Founder and CEO of *Ethical Fashion Forum*, addresses that we will not be able to consume the way we do for much longer. Scandals surrounding labor issues have forced brands to look at their supply chains, leading many retailers to shift their production to factories in their own countries, benefiting the local industry and the environment by cutting down on transport emissions (Styles 2015).

Similarly, some of the informants believe that these protests and criticisms are influential in shaping the industry. Nike sets a good example in this regard. In 1991 the company was protested for the low wages and poor working conditions at one of its Indonesian factories. Consumer protests, boycotts, media attention, and criticisms over the last 20 years drove Nike to make serious changes to its supply chain. These improvements and engaging in new innovations are leading the company to become one of the world's most sustainable companies in the future (Consultants, female and male, 30s; Gonzalez February 19, 2015).

As there is competition, all the retailers try to follow the trends and be the first one to offer their products as quickly as possible. However, as public awareness is increasing they will soon understand that health and maintaining sustainable lifestyles will become more important in the future. The competition will not be only based on being trendy but also on being conscious. Last year it was on the news that Zara is not conducting any tests or controls. This put pressure on Zara to make improvements. They are forced to become more sensitive. They already sell well so if

there were not any criticisms they may not have started this process. Public pressure and public awareness will encourage all retailers to become more sensitive. 2 or 3 firms cannot achieve this. It needs to involve the society. Society will be directing the change (Research and Developer, female, 30s).

Similarly, increase in public awareness and public pressure enforce other retailers to become more conscious and compel them to carry out tests and controls, leading to improvements in the system. Especially companies that are constantly being criticized for the environmental damage they cause, such as the denim firms, are the ones most interested in sustainable fashion (Academic director, female, 42). Even the retailers that were not concerned with code of conduct feel obliged to comply with the standards now, as majority of the retailers have become cautious of these issues (Owner, male, 57). Consequently, along with the criticisms and demands of the society, the pressure of the competitors is also important to achieve the required change.

Both meeting notes and secondary data indicate that Greenpeace DETOX campaign is a perfect example to show the impact of protests globally. There is now global concern over the use of toxic chemicals in the textile industry. Research carried out by Greenpeace disclosed that childrenswear products, garments, and shoes contain hazardous chemicals such as phthalate, antimony, organotin, nonylphenol, and etoxylade. The companies range from luxury brands to affordable retailers, such as American Apparel, Primark, Adidas, Disney, Nike, Burberry, Puma, and Gap. Among these are also products produced in Turkey and products produced elsewhere and sold in Turkey. The amount of hazardous chemicals found in childrenswear products is as high as the ones for adults. Furthermore, the toxic chemicals are not only found in garments. The chemicals released and emitted during production are also affecting children (Poulter 2014).

Zara alone churns out 850 million clothing items a year. We can imagine the size of the toxic footprint it has left on this planet, particularly in developing countries like China where many of its products are made (Li Yifang, campaigner at Greenpeace, from an article by Chua November 21, 2012).

Li Yifang, a campaigner at Greenpeace East Asia stated that the world's largest apparel retailers are among the worst offenders using hormone-disrupting and cancer-causing chemicals in clothing. The testing results show how much toxic chemicals the brands are dumping in China and other developing nations where products are made and regulations are loose (Chua November 21, 2012).

Greenpeace's Detox campaign requires textile companies to remove all hazardous chemicals from their production chains until 2020. Half a million people signed up to the campaign within days of its launch (Poulter 2014). With pressure from public, most of the retailers involved had to accept the Detox campaign. Since the campaign was launched in 2011, global brands started to investigate the manufacturing and the testing of garments.

Numerous brands including PUMA, H&M, Zara, M&S, Benetton, Valentino, Uniqlo, Mango and Levi's, have committed to eliminating the use of chemicals released during their manufacturing process; informing consumers; and improving their business practices by 2020 (Kissa 2015). Some brands started to implement strict controls over their supply chains. Others have been working with their suppliers in developing countries to find safer substitutes for chemicals being used in the production of their products. Consequently, use of toxic chemicals have been phasing out within a short period of time (C. A. Lee 2014).

Chih Ann Lee (2014), Detox campaigner for Greenpeace East Asia office, also stated that this kind of market dynamic will make safer alternatives more available and accessible for textile industry actors who aim to provide toxic-free products for their customers. Furthermore, the companies that act early will have advantage. Eventually, the regulations across the globe will force the textile industry and the brands to change to safer alternatives.

People have started to say "hang on, I want a bit more from the things that I am consuming then something that is just fast, immediate, and throw away." This cultural shift isn't happening fast. It is certainly not happening fast enough but it is there and it is influencing. The reality is that the retailers and brands they are not changing and they are not making this a core issue because they want to but because they see that they are very vulnerable if they don't. They are vulnerable because they are vulnerable to issues with resources and availability of resources but they are

also vulnerable to consumer criticism because it is possible that things to become viral very quickly. For example, Zara Inditex case with the Greenpeace protest is surprising with 300000 people signing petition in 24 hours. That tells me that people are engaged in this agenda (Business and research manager, male, 40s).

These improvements are not insignificant. Sometimes when we work in this area and we focus on design, we can start to ignore those changes because they seem very religioustical rather than being creative but they are important. They are really important. The reality with the Greenpeace protests and what they did has an impact and has changed things and that is significant. Whether or not it has really opened a broad spectrum of people's eyes to the reality that how things are made, I don't know, but it certainly meant that the retailers have to sit up and go "right what is happening here?"... (Business and research manager, male, 40s). (Rest of the quote is related to resource scarcity.)

On the other hand, it is not clear whether the Greenpeace protests and Detox Campaign on hazardous chemicals have had a big impact or whether it has increased awareness on how clothes are really made. However, it encouraged or even forced the retailers to start thinking about these issues, as it affected everyone from luxury to bottom line firms in the industry. According to some of the informants, the retailers and brands are not changing because they want to but because they see that they are vulnerable to resource scarcity and consumer criticism. Furthermore, with the increase in popularity of online media, it is very likely for these protests to become viral in a very short time, as in the case of Greenpeace protests. This actually shows that people started to become engaged in these issues as well.

Other campaigns also started to initiate protests against the fast fashion system and retailers. For example, Slow Fashion Forward started a protest on facebook, calling people to remember what happened in Bangladesh to more than 1.000 textile workers in 2013 and invites people to act now. The campaign involves, people wearing something inside-out; taking a picture; sending it to the mainstream global brands; asking them who made these clothes; and posting it on facebook. The impact may not be as big as the Greenpeace Campaign but even the small efforts like this help to raise awareness and become a warning to the retailers.

5.4.2.2 Enforcement of Standards

Increase of regulations and enforcement of code of conduct and standards is another important driving factor to become more sustainable. Some of the retailers and manufacturers apply these standards because they believe in them but there are others who comply because they are obliged to. The motives may be different but eventually, it will be inevitable for all the retailers and the suppliers to obey to these regulations (Owner, male, 57), especially once the industry has widely accepted compliance standards, which it lacks at the moment.

For instance, as addressed in the previous section, Nike started to pay more attention to code of conduct issues after the incidence that occurred in its sweatshops years ago. Last year, they stopped working with one of their suppliers in Turkey as it has not been complying with the code of conduct standards. This pressure is important according to some of the informants. For similar reasons, some retailers plan to stop supplying from Far East as it is too far away to track and control whether the companies are conforming to standards (Assistant consultant, female, 20s).

Swedish and Nordic groups, H&M being the pioneer, is among the first to initiate code of conduct in textiles. H&M's code of conduct is very systematic and detailed. They established a system that informs the customer about the product they buy. This is also valid for M&S. M&S developed such a system that when people look at the label they can trace where the cotton is bought from; where and how the garment is produced; where the accessories are from; confirmation that it does not contain any hazardous chemicals. It is a very informative system... (Merchandiser, male, 35).

Swedish and Nordic groups, H&M being the pioneer, have detailed and systematic code of conduct procedures for their suppliers. They also established a system that informs the customers about the products they buy. Similarly, British retailer M&S also established a system that allows almost 100 percent traceability. The label of the product enables the customer to trace the details about manufacturing process of the product.

The trends may not be adapted immediately because before we offer a product, it goes through so many controls. For instance, we prepare a collection and the fabrics

we choose to use for the collection are first inspected by the lab technicians. Together with these experts we assess if these fabrics can pass the tests; what are the risks involved. We do not use anything that fails; that is risky for health; or that incurs problems in production. We are also very sensitive about the chemicals used. We cannot use all the chemicals in our products. We try to be cautious in many respects. I have 15 years of experience in textiles industry and worked in denim, jersey, and woven companies. H&M is the company that pays the most attention to technical, ethical, and environmental issues. It is a pioneer in establishing ethical standards. If a manufacturer is producing for H&M and other retailers, it starts to follow H&M standards for the others as well. If a fabric is being produced for H&M, the tests and standards that need to be followed are different. Now this started to spread to other retailers as well. H&M helped in establishing this system (Research and Developer, female, 30s).

Most of the informants believe that H&M sets an example with its code of conduct and ethical standards. It encourages its suppliers and competitors to work in an ethical, environment friendly, and conscious way. It gives trainings and seminars to its employees and suppliers on topics such as natural resources, organic, and being conscious of the environment and society. They are constantly updated on these topics and are given targets that they try to meet. H&M also cares about the rights of its own employees and the employees and workers of its suppliers. It checks their wage policy, working conditions, use of child labor, and overtime. If there is a warning for any hazardous chemicals or materials for the environment or human health, H&M is often the first company to stop using it or to take action. It guarantees that all the test standards are followed and if anything fails then the product is not accepted. Consequently, compared to its competitors H&M may be slower in following the trends because it is very cautious of following all these standards but on the other hand, it is among the most ethical ones.

Customers are also becoming more conscious. The Company that Inditex outsourced visited us to inform about the formaldehyde procedures. It is one of the chemicals that can prevent getting pregnant. They want to ensure that the products don't contain any formaldehyde. All our ladieswear and kidswear products are undergoing chemical tests now. Especially after the launch of Ekoteks, dye houses

that dye fabric need to make sure that they do not harm the environment or human health. Some dye houses in Turkey have become professional in this respect. We need to become like this as well. If there is a print, the chemical used is important, if there is a bead they need to make sure it does not include lead phthalate... (Merchandiser, male, 35). (Rest of the quote is used in affordability section.)

Not all of the fast fashion retailers have a strict quality control process and are therefore easier to work with on the production side. However, as health and safety issues are gaining importance, most of the retailers now started to pay more attention to these issues and have become more conscious. For instance, Zara now has "Clear to Wear" and "Safe to Wear" procedures (Sales manager, female, 41). The manufacturers and suppliers need to take into consideration these guidelines; respect workers' social rights; not employ child labor; work within allowed hours of labor; avoid using hazardous chemicals; and follow all these requirements in production.

...We are increasing capacity. Our current production capacity is 20000 to 30000 pieces. Our new production capacity will be 50000 pieces per day. We have 750 workers. We do not want to use subcontractors as they cannot survive the current code of conduct procedures. In couple of weeks most of them go out of business. We are very careful about the code of conduct procedures (Owner, male, 57).

These requirements, standards, and controls have made the process more difficult for suppliers. Especially, the suppliers of big global retailers need to meet certain standards and code of conduct requirements to be able to sell abroad and to meet their export targets (Academic director, female, 42). Even the subcontractors need to comply with the standards as the code of conduct issues are gaining importance and most retailers started to require tests and quality controls. The ones who do not comply, face fines and even their supplier status can be cancelled. It is important for the regulations to be mandatory to ensure that they will be followed. Otherwise, it is likely that few will only take action (Freelance designer, female, 32).

The standards also helped to train the manufacturers and suppliers on issues such as hazardous chemicals; insurance of workers, employee rights, treatment of employees. Eventually the ones that fulfill the requirements started to have more

business because the importance of these standards have been increasing (Owner, male, 57). The steps taken by retailers and the targets set such as increasing the use of organic cotton every year, help the industry to improve and progress.

5.4.2.3 Gaining Competitive Advantage

For the actors on the institutional side such as retailers, suppliers, and manufacturers, becoming a pioneer and having competitive advantage are important driving factors in becoming more sustainable as well.

Companies definitely do not want to become sustainable because they really want to or because they think that it is the ethical way of working. Either they see it as a competitive tool or they see the trend in foreign countries and foresee that it will also become popular and may be compulsory in Turkey in the next 5 years so they want to lead the way by taking action now. They want to become the pioneer. It is definitely not because they believe in it. It is the new capitalist system or new version of capitalism, which they call the Green Capitalism. There are many articles on this. It is still a capitalist system. Sustainable business equals new capitalism. The businesses believe in this. They need to do it because they will gain profit from this. Firms need to integrate sustainability to their business models so that in the long term they benefit from its effects on profits. Firms that can think in long term and the ones with a vision want to work with us on sustainability (Consultant, female, 30s).

According to the field notes and some of the informants, companies most often do not want to work in a sustainable way because it is the ethical way of working. There are other driving factors that lead them to become more sustainable. Some consider it as another competitive tool. Others see it as a trend and foresee that it will become popular and maybe even compulsory in the coming years so they want to become the pioneers by taking action in advance.

Consequently, sustainability is likely to become the new business model or an additional business once firms start seeing this new market as the new profit center or a marketing tool. Some even consider sustainable business as the new capitalism, "Green Capitalism," since the main concern of most brands is still to promote shopping and to make profit. Therefore, most sustainability efforts are considered as marketing or competitive tools as addressed in the lack of trust section.

I do not like the word "popular." Sustainability needs to be a necessity more than a trend or popularity but in Turkey it is regarded as popular. For me, sustainability is a necessity and it will soon be obligatory as the environmental crisis is not far away. All of us need to think about these issues and the ones who start to take action now will be the winners of the future (Freelance designer, female, 32).

Furthermore, there are other advantages of becoming a pioneer. Sustainability will not remain as a trend or a fashion, it will become a necessity. Therefore, the companies, designers, manufacturers, retailers, brands, who start to think and work in a sustainable way now will be the ones who will survive in the future. The ones who start late and who wait for the crisis to happen will lose, as it will be too late to act.

5.4.3 Summary of Barriers and Driving Factors

As addressed above, there are many barriers that hinder the mobilization of a sustainable fashion system. Among these are barriers such as greed for economic growth and desire for new, which are related to speed and affordability dynamics of the industry. Moreover, lack of trust in the institutions; lack of knowledge, awareness, and legitimacy; globalization and lack of transparency; and paradox between fashion and sustainability, also impede the formation of a sustainable fashion market. Aesthetics can be both influential in increasing the appeal of sustainable fashion or become a barrier if it is not used skillfully.

On the other hand, analysis of the findings, review of previous literature and secondary data also reveal some optimism for the future of a sustainable fashion system (McRobbie 1997; Pears 2006; Fletcher 2008). There are driving mechanisms that shape the industry to become more sustainable, as stated above. Some of these triggers are related to speed such as stress, exhaustion, and conflict between actors. Others are an outcome of both speed and affordability such as depletion of natural resources; and increase in disposability, waste, and overstock.

Offering cheap prices also leads to unhealthy working conditions and lack of quality, undermining the value of fashion. Furthermore, the current design process lacks creativity, diversity, and originality. Along with these driving factors, triggers such as protests and criticisms; enforcement of standards and code of conduct; and

becoming a pioneer and gaining competitive advantage also facilitate the emergence and mobilization of a sustainable fashion market.

Characteristics and dynamics of the fashion industry and the barriers and driving factors discussed in the findings chapter are important to understand the process of market emergence, which is addressed in the discussion chapter. However, first I provide examples of sustainable fashion brands, companies, practices, and designers, which show the presence of the sustainable fashion market.

5.5 Sustainable Fashion Practices, Products, and Approaches

Analysis of the interviews and field notes suggest that firms started to talk more about sustainability and have become more sensitive to environmental and ethical issues. Similarly, secondary data shows that there is more demand for sustainable fashion both on the consumer and institutional side. Latest research carried out by H&M suggests that their shoppers are 21 percent more interested in ethical clothing than they were a year ago (Rickey April 24, 2014). The main purpose of this section is to show the existence of the sustainable fashion market by giving examples of different practices, actions, and approaches of various institutional actors.

The examples given address social, economic, and environmental issues; are related to wellbeing of workers, communities, and ecosystems; and incorporate actions of institutional actors such as designers, brands, retailers, and institutions. Furthermore, they include examples related to strategies of design, production, consumption, use, and reuse, which reveal that sustainable fashion develops a holistic understanding of sustainability issues as it concentrates on many different aspects and dimensions, not only environmental effects of fast fashion or the ethical standards.

It is really hard to understand if someone says the products are sustainably produced, what do they mean? Do they mean the catch phrase version of sustainable, or do they mean it is authentically sustainably produced? (Darabi, co-founder of Zady, from an article by Donatelli 2014).

Green and eco movements have started since 1950s. Green actually refers to the whole process being green (Consultant, female, 30s). However, as Darabi, the co-

founder of Zady, which is a conscious e-tailer, states the word "green" has been co-opted by marketers (Donatelli 2014). Sustainability is not only about materials. It's an opportunity to be radical in fashion and being radical in fashion goes beyond green labeling. Therefore, to avoid "sustainability" to become a buzzword, some argue that it may be better to get rid of eco, ethical, sustainable categorizations and labels (M. Lee 2011) and focus more on actions and efforts to improve the system, which are highlighted in this section.

Many global apparel companies are trying to improve the environmental and social impact of their products and supply chains. Even fast fashion brands such as H&M, that often promote shopping have made sustainability commitments. There are many examples initiated by designers, brands, retailers, institutions, foundations, and NGOs. Some of the initiators of sustainable fashion are prior actors of fast fashion. The examples in this section are grouped based on the initiator or the purpose, such as examples related to environment, resources, and materials; reducing textile waste; recycling and upcycling; ethical standards and supply chain transparency; increasing awareness and participation; sustainable products and collections; and actions of institutions, foundations, and NGOs. Examples from Turkey context are given at the end of the section.

5.5.1 Examples on Environment and Resources

Eco-friendly clothing brands, retailers, institutions, and designers take various actions to limit their impact on the environment. Some of these actions involve using sustainable fabrics and fibers; using less water and energy; eliminating use of hazardous chemicals; and decreasing their carbon footprint. For instance, fashion and apparel brands like Kering, Nike, and Uniqlo are working to develop a new generation of materials in order to enhance the style, performance, and sustainability of their products (Pierrepont 2014). Eileen Fisher is one of the leaders in eco design, offering basics in sustainable fabrics, such as organic cotton, linen, hemp, recycled fabrics, silks that are dyed using fewer chemicals, less water, and less energy (Meepos 2014). By decreasing the carbon footprint of its brands, Topshop participates in the Sustainable Clothing Action Plan (SCAP)'s 2020 commitment, which aims to improve the UK clothing industry's environmental footprint (Ettinger 2014).

We are seeing a growing interest among customers and employees in sustainability matters and our progress in this field. That is why this annual summary and insight into what we have achieved so far and the challenges and opportunities that we see before us is very important for Lindex (Sara Winroth, Sustainability Coordinator and Environmental Manager, Lindex).

Lindex, which is one of Europe's leading fashion chains with annual sales of 6 billion SEK, has ambitious environmental targets as well. By 2020, the retailer aims 100 percent of their cotton to be organically farmed or be certified under the Better Cotton Initiative. Lindex's sustainable fashion accounted for 17 percent of the range in 2013. The goal is to have more than 80 percent of the range to carry an environmental label or come from sustainable fibers (Hedlund 2014). According to its ninth sustainability report issued in 2013, Lindex increased its sustainable range by 39 percent compared to previous year; reduced the electricity consumption in stores by 3.6 percent; adapted more cleaner production and reduced air freight by 1.5 percent. It also launched a new collection for men, made from 95 percent organic cotton (*Textiles Update*, May 27, 2014).

Levi's is another brand working to improve the environmental impacts of its actions. According to the World Wide Fund for Nature, producing a single pair of jeans uses 11,000 liters of water during manufacture. Levi's have signed up to the Better Cotton Initiative and come up with a technique for washing denim in recycled water (Champ 2014). Other environmental actions of the brand are Levi's Care Tag for Our Planet, which is the clothing-care program it pioneered with Goodwill; Waste<Less; water reuse/recycle standard; and Wellthread collections (Gonzalez February 19, 2015). Levi's aims to make 80 percent of its products using Water<Less techniques by 2020. Through its sustainability schemes, the company saved 1 billion liters of water since 2011 (Chua March 18, 2015).

At the Copenhagen fashion summit, Stella McCartney introduced Clevercare, a new garment labeling system, created with Ginetex, which owns washing symbols, aiming to educate consumers on how to care for clothes. She argues that "*the less we wash our clothes, the better*" (Rickey April 24, 2014). H&M also features Clevercare

labels, encouraging the customers to save energy by washing clothes at lower temperatures.

Water is a key resource for H&M, and we are committed to ensuring water is used responsibly throughout our value chain. We do this to minimize risks in our operations, protect the environment, and secure availability of water for present and future generations. We are proud of the partnership with WWF, which we hope will inspire others to follow (Karl-Johan Persson, CEO of H&M).

This partnership marks an evolution in the corporate approach to water. H&M understands that its long-term success depends on access to adequate water supplies. It also understands that its social license to operate depends on being a good neighbor and good steward of shared resources. H&M's water strategy is an integral part of its business plan. We hope other companies will be inspired to take the same approach (Jim Leape, Director General of WWF International).

Furthermore, H&M adopts a new water strategy, created in partnership with conservation organization World Wide Fund for Nature (WWF), to minimize water impacts throughout its operations and to ensure that water is used responsibly throughout the supply chain. H&M is aware that its long-term success depends on access to adequate water supplies. Therefore, it makes water strategy an integral part of its business plan, improving its internal water efficiency, minimizing its suppliers' impact on water, and educating staff and customers about water issues. In this project, WWF and H&M work in collaboration with policymakers, NGOs, water institutions and other companies to support better management of river basins in China and Bangladesh (WWF January 24, 2013).

H&M's suppliers participate in the project as well. The strategy is implemented across all of H&M's 48 national markets, with the aim of reaching all 750 direct suppliers and many fabric manufacturers. Approximately 1,000 H&M staff in buying offices are directly involved in implementing the strategy. All 94,000 H&M employees are learning about water issues. This partnership builds on 10 years of H&M's work to reduce negative water impacts and it is the first time a fashion company has applied such a comprehensive model across their whole business and supply chain. Therefore, WWF believes that H&M's actions can lead and inspire

other companies to take similar approaches to tackle environmental risks (WWF January 24, 2013).

Moreover, both secondary data and meeting notes show that big retailers such as H&M, M&S, and C&A use sustainable fabrics such as organic leather, recycled wool, organic cotton and wool, and bio cotton in their products. Even though most use only a small percentage, they aim to increase the ratio in longer term. For instance, H&M tries to integrate the organic program to all of its orders. The merchandisers have to buy a certain percentage of organic cotton to achieve the yearly set targets and they aim to use a higher percentage of bio cotton (cotton produced according to fair trade and ethical standards) in their products every year. Along with big retailers smaller brands also use organic materials. For instance, Canadian lifestyle clothing brand Miik's clothing line is made of exclusively organic materials (Hadden 2012).

Meeting notes further highlight that retailers like Ikea and H&M are following the Better Cotton Initiative (BCI), which according to some of the informants is easier to apply compared to organic. In organic cotton, whole accessories and production process needs to be organic. In better cotton, fabric is organic. The retailers that use better cotton are not allowed to advertise it. They can communicate that they use better cotton but they cannot put it on the garment as a label, unlike organic. They also make an agreement with their suppliers to use better cotton. The Better Cotton Initiative aims to make sustainable cotton more mainstream by providing support and training to farmers to reduce environmental impact while increasing efficiency and productivity (Mazzoni 2014).

Another commitment to decrease environmental impact is eliminating the use of hazardous chemicals in the entire supply chain, supported by big sportswear brands such as Adidas and Nike. Greenpeace refers to these brands as "engaged," which indicates that they have agreed to phase out all toxic chemicals by 2020. Other brands that have agreed to do the same are C&A, H&M, Puma and, M&S. "Detox greenwashers," such as G-Star Raw and Levi's, are brands that have declared a zero-discharge intention but have not made individual commitments or action plans. "Detox laggards," are brands with chemical-management policies and programs but that have not yet made a credible commitment to zero discharge. Among these are

Zara, Calvin Klein, Tommy Hilfiger, Mango, and Gap. Finally, there are "discharge villains," such as Esprit and Victoria's Secret, which lack policies and programs for chemicals management (Chua November 21, 2012). As a result, Greenpeace protests have not been influential on some brands but overall it helped at least to expose the brands that use toxic chemicals in their products.

H&M is doing interesting things in this regard. It is different than Zara. If H&M plans to sell the products in West than they split the production and produce the products that will be sold in West in manufacturers in West. The products that will be sold in East, such as China, will be produced in East. Whereas, Zara collects all the products in its warehouse in A Coruña and then distributes it from there to 30 countries. I produce in Turkey, ship it to Spain and then they send it back to the Turkish stores. H&M sends the products directly to warehouses in those countries. This is a very important contribution (Owner, male, 57).

Another important step that H&M takes in becoming more sustainable is to produce in factories closer to the regions that they will sell to and send the products directly to the warehouses in those regions rather than to a central warehouse. This shows the company's concern for the environment as the system decreases carbon emission by preventing products to travel all around the world (Consultant, male, 30s).

There are also campaigns to protect the environment. For instance, some of the world's largest and most recognized clothing brands such as Inditex, H&M, Levis, M&S, ASOS, and Portico/Under the Canopy, are behind the Fashion Loved by Forest campaign to protect endangered forests. By developing forest-friendly purchasing policies; tracking which forests their fabrics originate from; taking steps to eliminate controversial forest fibers; and investing in innovative alternatives, these global brands are leading the fashion and apparel sector for sustainable solutions at scale (Leading the Way, *Fashion Loved by Forest*).

Furthermore, there are technological developments that the manufacturers undertake to improve environmental consequences of fast fashion. Teijin's whole recycled polyester and close loop process and Lenzing's tencel close loop cellulosic fiber process are among these developments. The Lenzing Group is the global market

leader based in Austria with more than 75 years of experience in the production of high-quality, man-made cellulose fibers. They have been committed to principles of sustainable development and practice on all levels throughout the entire Group. Their expertise is in modal and tencel production.

Toxic chemicals and water waste in textile dyeing affects both the environment and health of people. Nike's Vice President of Sustainable Business, Hannah Jones, states in an interview that Nike partnered up with Dutch company Dyecoo to create a sustainable dyeing technology called ColorDry that eliminates the use of water and chemicals from the process. It is an important step toward sustainable manufacturing. Furthermore, Nike is setting an example for other large brands and for smaller ones to produce apparel with lower waste and lower impact dyeing technology.

Nike innovates not only in the design of our products, but also in how they are made. We see sustainability and business growth as complementary and our strategy is to prioritize relationships with factory groups that demonstrate a desire to invest in sustainable practices and technologies (Erik Sprunk, Nike's COO).

DyeCoo's dyeing method replaces the water used in textile dyeing with recyclable CO₂, which reduces the amount of energy used and eliminates the need for certain toxic chemicals. The ColorDry process creates textiles with more intense and consistent color, while reducing dyeing time by 40 percent, energy use by 60 percent and the carbon footprint by at least a quarter. Partnership with suppliers is important in improving sustainability practices. Nike's partnership with DyeCoo is a perfect example to this. If more companies and nations utilize this technology, it will become more accessible to more apparel producers and initiate the development of more sustainable methods (Oijala 2014).

On the other hand, consumers often find it difficult to understand these technological developments and terms (Business and research manager, male, 40s). Therefore, companies also need to make sure that they explain their actions and the results of these actions to their users and consumers.

5.5.2 Reducing Textile Waste: Recycling and Upcycling

Brands and retailers are now working to decrease textile waste, which is one of the most important negative consequences of fast fashion, since almost 85 percent of all textiles end up in landfills each year or is burned. H&M is one of the brands which aim to minimize waste that goes into landfills by finding a solution to reuse and recycle textile fibers (*PRNewswire*, March 19, 2015). It started an in-store garment collecting program with tag line, "Don't let fashion go to waste." In 2013, they collected 5,000 tons of used clothes which are equivalent to 15million T-shirts (Rickey April 24, 2014) and since the launch in 2013, almost thirty million pounds of products have been collected.

H&M and not-for-profit organization DoSomething.org, one of the largest organizations for young people and social change, are working together for their second annual Comeback Clothes campaign. As the face of the campaign actress Victoria Justice, star of the MTV cyber thriller "Eye Candy," encourages fans to recycle their unwanted clothing. Participants who bring any old or unwanted clothing and textiles to any H&M store, in return will receive 20 percent off their next H&M purchase. Furthermore, young people who sign up for the campaign will have a chance to win a \$10,000 scholarship or a \$4,000 school grant (*PRNewswire*, March 19, 2015). Meeting notes and interviews also support that H&M has recycling campaigns in Turkey. The retailer collects unwanted clothes with traveling cars in Istanbul and through boxes placed in certain stores.

Pierre Börjesson, H&M's senior sustainability specialist, who spoke during Eco Fashion Week's (EFW) educational seminars, talked about the changes already happening in the industry. H&M aims to end the linear consumption model, where unwanted garments end up in landfills and replace it with a circular model through its Garment Collecting Initiative. Unwanted clothes, donated by consumers to any H&M store will be recycled into new fibers to be used in new collections or into energy (Hyslop 2014).

Our technology is at the heart of a global vision which will engage all brands, textile recyclers, suppliers, and consumers in a unified ambition to keep clothing already in circulation out of landfill, and as part of a global pool of resources to be used time

and time again (Cyndi Rhoades, Worn Again CEO, from an article by Chua April 2, 2015).

Some consider H&M's efforts as a "green marketing" tactic (Bain 2015) but the company is still continuing its efforts and now working together with the French luxury conglomerate Kering and London-based technology firm Worn Again to recapture fibers from end-of-use clothing and textiles. Anna Gedda, H&M's head of sustainability, says that the project could transform fashion as an industry (Chua April 2, 2015). Worn Again is a London-based firm working on "textile to textile" chemical-recycling technology, which is able to separate and extract polyester and cotton for re-spinning into new yarns. This process can enable a "circular resource" model, allowing textiles to be collected, processed, and remade into new textiles and clothes in a cyclical fashion. There are some obstacles in separating blended fibers and removing dyes and other contaminants, as it is not an easy process. H&M and Kering are monitoring the technology's use to demonstrate its viability for commercial production (Chua April 2, 2015).

We have a responsibility to do what we can to act responsibly and work with sustainable fashion both in smaller and larger contexts. We offer more items made from recycled materials this year than ever before and the success in our various markets shows that our customer like our offering. We are actively working on sustainability matters and are proud of the great progress our employees have helped accomplish this year. Offering the right products, at the right price and the right time is part of our sustainability effort and we will continue to invest in this in the future (Göran Bille, CEO, Lindex).

Other big retailers are also taking steps towards a sustainable approach to fashion. Lindex is among these retailers which has made great progress in offering more items made from recycled materials (*Textiles Update*, May 27, 2014). Leading British retailer M&S recently launched "shwopping" initiative, enabling customers to donate still-wearable, but unwanted items of clothing in store. The company runs a successful partnership with Oxfam charity which encourages people to take

unwanted M&S clothes to their nearest Oxfam shop, in return for a £5 M&S voucher (WRAP 2012).

The industry needs to take a positive approach to a changing world and sustainability will inevitably penetrate all aspects of the fashion and textile design and production. We need to look at waste as a resource, and inspire young designers to its immense creative potential and help the industry to understand its viability, scalability, and role in the future (Orsola de Castro, from an article by Chua November 20, 2014).

Zero Waste Scotland has announced a new fund to encourage Scottish fashion designers to develop their own closed-loop clothing. Financed partly by the Scottish government, the Circular Economy Textile and Apparel Grant Fund works with business, communities, and local authorities to reduce waste and increase recycling. Industry experts such as Orsola de Castro, often known as the "Queen of Upcycling," provides mentoring to the successful applicants. The new fund will allow young designers to become initiators in waste reduction and inspire them to have a positive approach to future of fashion and sustainability (Chua November 20, 2014).

Upcycling and recycling collections are important to decrease textile waste. In 1997, Orsola de Castro, designer and campaigner, founded luxury upcycling label From Somewhere. Since then she has been creating upcycled collections for both the niche and mass markets. Together with partner Filippo Ricci, she launched Reclaim to Wear in 1997 for Topshop, as a design-forward solution for textile waste. Topshop recently launched its third upcycled "Reclaim to Wear" capsule collection, derived from production off-cuts and surplus stock from previous seasons (Chua August 19, 2014). Customer response to previous Reclaim to Wear collections has been enthusiastic, encouraging the retailer to further develop the range and invest in upcycling collections (Ettinger 2014).

Urban Outfitters pioneered the "renewal" or "reclaimed" vintage trend with Urban Renewal many years ago (Meepos 2014). Esprit also launched its third Recycled Clothing Collection in collaboration with Berlin designer Karen Jessen, winner of the 2013 EcoChic Design Award. According to the retailer, the repurposed

production waste serves to reduce textile waste, save water and carbon emission, and promote a more sustainable lifestyle. In partnership with Redress, all garment hangtags of Esprit include a Quick Response code that links to the organization's R Certificate website, where customers can view details about its supply chain, which also increases transparency (Chua October 7, 2014).

There are examples of smaller scale firms and designers as well. The Scandinavian brand Max Jenny is a pioneer of "Zero Offcut Fashion," minimizing waste through using the entire cut-offs created (Hadden 2012). Daniel Silverstein is another example committed to keeping fabric waste to a minimum by using a unique draping technique. He addresses that textile pollution is a growing problem in the fashion industry and an average of 10 to 15 percent of the fabric used to make every garment is thrown away. He considers it both an opportunity and a huge challenge to create something incredible from what every other designer sees as trash (The Piece Project: Part One, 2014).

Christopher Raeburn, a young designer from London, started upcycling by repurposing surplus fabric and garments from the military products. Together with CSF, he reuses and reworks military materials that would be decommissioned otherwise (Business and research manager, male, 40s). Faustine Steinmetz made an official presentation at London Fashion Week with her denim collection, which she remakes from old shredded jeans. The pieces are hand-woven in an environmentally sound, low-energy manner. Katie Jones has a multicolored crochet collection which is made of yarn from pre-existing items (Mower 2014).

Mending is an important part of upcycling and recycling. In this regard, Nudie jeans shows how mending and repairing can be used to become more sustainable. Its repair shop concept aims to increase the life of denim, ultimately helping to consume less (The World of Nudie Jeans, 2014). Similarly, Geoffrey Szuszkiewicz and Julie Phillips have a project called Buy Nothing, where instead of buying all the time, people are now mending and repairing what they own already (WGSN Consumer Briefing, October 31, 2014).

Another interesting example is the Dutch denim company Mud Jeans, which created a model for reducing the amount of waste. They have created a leasing system called "Lease A Jeans," leasing organic and recycled jeans. Clients have the

option of leasing their jeans, for a €20.00 deposit and €5.95 for each month of use for a year. The lease includes repair services. After a year's lease, the jeans can be swapped for a new pair, bought outright, or simply returned (Badore 2014).

Moreover, Mud jeans use GOTS-certified organic cotton or recycled fibers. They're made in fair-trade factories in Italy, for distribution in Europe. Bert Van Son, the CEO and founder of Mud Jeans, said that the biggest challenge is getting people to accept that clothing can be part of what he calls the "performance economy" or "sharing economy." However, many people started to get curious and the idea is becoming popular. According to the Mud website, there are currently 1,500 people leasing their jeans. After the first year, 30 percent of leaseholders keep their jeans, 60 percent swapped for another pair, and 10 percent returned the jeans, which according to Van Son signifies that they are building an "engaged community" (Badore 2014).

Some of the examples include the consumer in the process such as Junky Styling in London which deconstructs, reworks, and transforms worn clothing, where the customer can have an active part in the process as a co-producer. Ethical retailer TRAIID (Textile Recycling for Aid and International Development), sells new recycled garments that have been redesigned and reconstructed (Clark 2008).

There are examples of collaborations as well. For instance, Sea Shepherd Conservation Society (SSCS) USA, which is an international non-profit, marine wildlife conservation organization, collects plastic and debris from the most polluted areas of the ocean and shoreline and then hands it over to Bionic Yarn and denim brand G-Star RAW to turn into sustainable fabric and fashion. G-Star's "Raw for the Oceans" collection, which includes eco-jeans made from turning reclaimed plastic ocean waste into Bionic Yarn denim fabric was launched in August 2014 (Pepelko 2014).

Another collaboration is Fashion Remake with Ekocycle™ by Coca Cola, where six new fashion design graduates from European Institute of Design (IED) presented their eco-sustainable collections using only Newlife™ yarns as the recycled material, at Milan Fashion Week. Ekocycle™ is an independent brand founded by Coca Cola. C.L.A.S.S. with NEWLIFE™ and its manufacturing partners have supported the project. Newlife comes 100 percent from recycled PET bottles

that are made into high-tech, certified quality yarns. The clean and transparent process is both chemical free and minimizes water and energy use. Italian Fashion Chamber of Commerce also supports the project, which aims educate and raise consumer awareness on sustainability and the importance of recycling in everyday life (C.L.A.S.S. 2015).

5.5.3 Ethical Standards and Supply Chain Transparency

This section includes examples of initiatives taken to improve ethical standards and supply chain transparency. There are still safety problems at many factories, especially in less developed and poor countries. Therefore, global chains, brands, and retailers have started to take precautions to make sure that the development of the sector is well regulated and the industry maintains high ethical standards to prevent factory disasters like the recent one in Bangladesh (Thomasson 2014).

We see that strongly in our business interest to take that long-term view. It's fundamentally important to customers who want to be confident that everything they buy has not been sourced in poor conditions (Giles Bolton, ethical trading director at Tesco, from an article by Thomasson 2014).

Tesco is among 150 clothing brands and retailers working together to improve safety in the Bangladesh garment industry. Furthermore, retailers like Tesco and H&M do not want to rely on Asian sourcing and aim to source from alternative regions and countries such as Ethiopia and sub-Saharan Africa. Therefore, they have started actions to ensure fair treatment of workers and enhance ethical standards in those regions. For instance, H&M recently announced its commitment to pay living wages to textile workers in factories in Bangladesh and Cambodia (Gonzalez January 5, 2015) and it is the first brand to sign the Accord for Building and Fire Safety in Bangladesh. Just like H&M, Lindex signed the agreement to improve safety in Bangladesh factories (*Textiles Update*, May 27, 2014).

According to the campaign group Labour behind the Label (LBL), Zara aims to raise workers' wages to meet a "living wage" benchmark. Therefore, it signed up to the Ethical Trading Initiative. M&S also aims for workers in Bangladesh, Sri Lanka, and India to be paid a living wage by 2015. However, most brands still do not

want to give up even a small fraction of their profits. They lack transparency and employ subcontractors and indirect employees, who do not have as many workers' rights (Champ 2014).

There is loads of interesting examples out there. Brands have taken unusual approaches to the way they interact with their consumer and the way they sell products and provide services. Probably the most obvious and regularly cited example is Patagonia. They have done lots of work on analysis of their supply chain and supply chain transparency, which is really important. They also looked at alternative ways to make money so they commensurate partnership with eBay...They are a really good example but they are not huge... (Business and research manager, male, 40s). (Rest of the quote is related to lack of trust.)

Supply chain transparency is an important pillar of sustainable fashion and it is critical to ensure ethical working standards. Patagonia is a good example, which continually demonstrates how sustainability is embedded into its corporate model. They have carried out a lot of work on analysis of their supply chain and supply chain transparency. Lindex is another retailer which published its supplier lists to increase the level of transparency (*Textiles Update*, May 27, 2014).

Tragic events can initiate ethical practices too, as discussed separately in section on initiators of change. The Rana Plaza disaster in Bangladesh, for example, motivated the founders of Indelust to build an e-commerce site which integrates sustainability into its business model. Indelust founded by Sana Rezwana, focuses on improving supply chain transparency, creating positive social impact, and manufacturing ethically and profitably. It encourages designers to work with local artisans to create clothes, accessories, and homeware products that are valued for a lifetime.

Rezwana argues that value chains can be improved with better industry collaboration and more effective monitoring and purchasing practices. In this regard, they are partnering with Nest, which is an international NGO whose mission is to align the interests of local designers and artisans to produce ethically sourced materials. Indelust also sets an example of reviving and supporting handcrafts and local artisans. They are currently sourcing from AIACA (All Indian Artisan and

Craftworkers Association) and plan to expand and work with more artisan groups that live in economically disadvantaged communities (Indelust.com, n.d.).

Using local resources facilitates supply chain transparency and helps development of local businesses. For instance, online giant ASOS has an ethical line made in Kenya, which uses local fabrics (Champ 2014). Topshop runs a "Made in UK" project, sourcing some products closer to home (Ettinger 2014). British department store John Lewis also aims to increase its British suppliers by 15 percent in 2015 and it stocks brands such as Seasalt, a Cornish company that specializes in Soil Association-certified organic cotton (Champ 2014).

5.5.4 Examples on Increasing Awareness and Participation

There is a growing interest in sustainability matters. Therefore retailers and brands started to invest in sustainability. This section involves examples of practices which help to increase awareness and participation of different actors. Dickson from Slow Fashion Forward addresses that it is the responsibility of businesses to create value and to communicate it to customers. In this respect, fairs, conferences, and seminars are important in striving for global change in the fashion industry and in raising awareness and knowledge. Furthermore, these events are also important to bring different actors, including designers and industry professionals, together to explore what can be done to increase the sustainability of the fashion industry (Krahn 2014).

Sustainability is becoming a part of popular Fashion fairs such as Premiere Vision. In the fair which took place in Paris in September 2014, topics such as ecological fabrics, recycled fibers, ecological dyes, and responsible production requiring the use of less energy and water in production, were discussed, which also indicates the association between technology and fashion.

Madrid hosted the third Sustainable Fashion Conference, organized by Slow Fashion Spain, in April 2014. The Conference seeks to demonstrate how fashion can become compatible as a sustainable industry. Industry experts and professionals attending the conference explore topics such as toxic chemicals used in fashion, use of sustainable materials, and clean processes to help environment, to show how to transform the fashion industry into a sustainable one (The sustainable fashion academy, April 10, 2014).

Vancouver Eco Fashion organizes events such as conscious films and informative seminars given by great speakers such as Fashion Designer Maureen Dickson from Slow Fashion Forward; Myriam Laroche, Founder and President of Eco Fashion Week; and Pierre Börjesson, Senior Sustainability Specialist of H&M (Krahn 2014). Finally, Copenhagen Fashion Summit is the world's largest event on sustainability in fashion, where the fashion industry celebrates the focus on a more sustainable fashion future (Rickey April 24, 2014). Big fast fashion retailers such as H&M was a part of the Copenhagen Fashion Summit in 2014.

Documentaries and films help to raise awareness on sustainable fashion as well. In this regard, Livia Firth, actor Colin Firth's wife and the founder and creative director of Eco-Age, made the film "The True Cost" in order to attract attention to the bitter truth behind fast fashion. The documentary, which was launched on 29 May 2015, is about the dark side of fashion and is likely to make people question everything about cheap fashion and the current fast fashion industry (Chua May 19, 2015). With the film, Firth aims to make sustainable fashion more widespread; increase consciousness of consumers; and invite producers and governments to become more sensitive on these issues. Furthermore, Firth encourages people to think about the origins of their clothes and to make a connection with the makers of the garments they buy and wear (Rickey April 24, 2014).

To raise consciousness on sustainable fashion, Livia Firth further started the Green Carpet Challenge in 2009. She attended the Golden Globe award ceremony wearing a sustainable design. After the event the Green Carpet Challenge became a success and was supported by actresses such as Cameron Diaz and Meryl Streep. Green Carpet Challenge also collaborates with different well-known luxury brands such as Alberta Ferretti, Erdem, Burberry Prorsum, Prada, Moschino, and Tom Ford. Considering that events such as Oscars and Golden Globes are important marketing platforms for brands, it is important to promote sustainability in these events. It is a perfect arena to communicate both with brands and with consumers (Bursaligil 2015).

Along with fairs, seminars, and events, awards help to increase interest and participation of the actors as well. For instance, The Global Leadership Award in Sustainable Apparel (GLASA), coordinated by The Sustainable Fashion Academy

(SFA), was launched in 2013 to inspire leadership in the apparel sector and to mobilize key stakeholders that can increase the sustainability performance of the apparel industry (*Textiles Update*, April 25, 2014). The GLASA promotes a holistic approach to assessing the sustainability performance of the apparel industry, by not only focusing on business initiatives, but also on the leadership needed from actors such as non-governmental organizations, academia and research institutes, media, and governments.

Another award in this regard is the LCF's Fashioning the Future Award, which was given for the third time in November 2011. LCF partnered with the UN to focus on sustainable fibers in 2011, which was the year of biodiversity (M. Lee 2011). Fashioning the Future aims to create a platform for emerging thinkers, doers, designers, and innovators. It facilitates interactions between people in education and business and enables exchange of knowledge, skills, and experience for a better future.

Fashion blogs and forums facilitated by development of technology also enable sustainable fashion to become a more common interest. There are many fashion blogs that raise awareness of the social and environmental impacts of the fashion industry, and promote ethical and sustainable fashion. They show how we can all be both stylish and responsible. Many examples were given in the design and aesthetics section.

Apart from the previous examples given, there are other important sustainable fashion bloggers who help to increase awareness and keep people up to date on the news and trends in the industry. For instance, Tansy E. Hoskins' *The Guardian Sustainable Blog* provides news on sustainable fashion and the developments and movements in sustainability. Mette Te Velde's *Strawberry Earth* is another creative blog with a tagline "Always green. Never grumpy." Center for Sustainable Fashion's *CSF Blog* works in partnership with Kering. Greta Eagan's *Fashion Me Green*, shares tips to make daily lives easily sustainable. Sass Brown's *Eco Fashion Talk*, is about the sustainable luxury fashion world, covering the latest stories in sustainable fashion. Joshua Katcher's *The Discerning Brute* is a sustainable blog for men. Starre Vartan's *Eco-Chick* provides ways people can incorporate sustainability into their daily lives.

Moreover, "swapping" or "swishing" events, where consumers come together to exchange items they no longer wear (Prothero et al. 2010, p. 152), are practices that help to increase awareness and participation as well. Futerra Sustainability Communications Agency in UK began swishing events in 2000, when Lucy Shea, founder of the green PR firm and her colleagues wanted to come up with a way to fulfill love of retail shopping without contributing to increased consumption.

The purpose of these events is to draw attention to sustainable fashion, develop sustainable consumption habits, and increase environmental awareness of the consumers. Furthermore, these events can also promote collectivity and sharing rather than individual ownership, which according to Prothero and colleagues is important in decreasing the demand for consumer goods, and helps to resolve the problems caused by the dominant social paradigm (Prothero et al. 2011). From the consumers' point of view, participation in these events may be for environmental or financial reasons, or simply to enjoy acquiring new items without spending money, and avoiding the stress of busy shopping malls (Prothero et al. 2010).

5.5.5 Examples of Sustainable Products and Collections

This section includes examples on sustainable fashion products and collections. Leading global apparel brands have started to adopt slow fashion principles to make clothes more sustainably. The North Face, for example, recently launched a line of products made in the United States using locally-sourced materials and resources, and designed to reduce waste. Emerging designers and e-commerce retailers such as Zady, Modavanti and Cuyana are leading the slow fashion movement, selling more ethically and sustainably made apparel products that are built to last. They promote high quality versus fast production, durability versus design for obsolescence, and mindful consumption versus overconsumption (Gonzalez January 5, 2015).

Conscious e-tailer Zady carries 65 sustainable brands, plus a private label that has a "farm to closet" ethos. It has a transparent supply chain, which consists of five points, all based in the United States. According to Zady, a sustainable garment is one that is produced with low water usage and high-quality raw materials that are locally sourced (Donatelli 2014). It sells women's and men's clothes and accessories

that are beautiful and timeless, and are also made using the highest quality raw materials by ethically treated workers.

Despite its affordable prices, H&M is one of the best high street chains for ethical clothing (Champ 2014). Its Conscious Collection offers affordable basics in eco-friendly fabrics. Its newest collections highlight that stylish fashion design is possible with eco materials. In 2014, the Swedish retailer launched a Conscious Collection made from recycled fibers and organic cotton and their newest eco-friendly collection in partnership with model and activist Amber Valletta feature two new materials, organic leather and organic silk (Meepos 2014). H&M also launched Conscious Exclusive collection, which combined Hollywood elegance with sustainable materials. The limited-edition collection was made with organic cotton, recycled polyester, recycled polyamide and tencel and it was sold in 140 stores worldwide, 2 of which were in Turkey (*PRNewswire*, March 19, 2015).

M&S launched the "world's most sustainable suit," in September 2012, which was designed to be stylish as well as sustainable. The suit, which is recognized as "one of the greenest garments ever made," is comprised of organic wool, a lining made of recycled plastic bottles and canvas, labels made of recycled polyester, and reclaimed buttons and reclaimed fabric for the pockets and waistband (LeBlanc 2012).

Joint efforts with celebrities can help to increase the appeal of sustainability collections. For instance, the South African department store Woolworths Holding has just appointed artist Pharrell Williams as style director, who is expected to spread sustainability-focused projects. Ian Moir, CEO of Woolworths, said that he hopes the musician will help the company "make sustainability cool for the next generation of South Africans." Woolworths is organizing a T-shirt competition for that celebrates sustainability. The selected designs will be produced by Williams' textile company, Bionic Yarn, which creates fabric out of recycled plastic bottles, and sold at Woolworths stores across South Africa (Chua April 13, 2015).

There are examples of luxury brands and designers who launch sustainable collections as well. For instance, designer Stella McCartney built the world's first sizable sustainable luxury brand. She also supports the Green Carpet Challenge and designed a whole collection based on sustainable fashion for the event (Rickey

2014). The next section includes examples of institutions, foundations and NGOs who work on sustainability.

5.5.6 Examples of Institutions, Foundations, and NGOs

Centre for Sustainable Fashion (CSF), a research centre based at London College of Fashion, is one of the institutions working to build a sustainable future. The centre supports London College of Fashion's commitment to using fashion to drive change and improve the way we live. It was established in 2008 by Dilys Williams and is supported by other key change makers. According to CSF, fashion shapes and reflects society and communities, their culture, and diversity. It is an everyday phenomenon, which is both personal and ubiquitous. Therefore, it plays an important role. CSF aims to question and challenge patterns of excessive consumption and it seeks to expand fashion's ability to connect and identify individual and collective values (Centre For Sustainable Fashion, n.d.).

LCF and CSF's commitments and efforts on sustainability influence their students as well. Consequently, some of the graduates work in this area. For instance, one of the graduates set up "Here today, here tomorrow," an experimental fashion shop and studio which aims to engage customers in how products are made. Another graduate set up a fashion upcycling social enterprise called "Antiform" (M. Lee 2011). As a result, colleges and schools play an important role in educating the future initiators of change.

Another example of the initiatives is Fashion Positive, which is backed by designers and brands such as Stella McCartney, G-Star Raw, Loomstate, and Bionic Yarn. Fashion Positive program, funded by Schmidt Family Foundation and the DOEN Foundation, aims to help fashion businesses in five areas of sustainability: material health, material reuse, renewable energy, water stewardship, and social ethics. The goal is to create the "next generation of fashion building blocks" and guide fashion industry into the future (Chua November 18, 2014).

As mentioned previously, C.L.A.S.S. (Creativity Lifestyle Sustainable Synergies) is a worldwide network, which provides global communications, marketing, and product development consulting services. It specializes in new fashion and fabrics created through innovative and sustainable design solutions. It promotes natural and organic textiles made from wool, silk, cashmere, cotton, linen,

and hemp; repurposed and recycled fabrics made from recycled polyester, recycled polyamide, cashmere, cotton, denim, and wool created to reduce carbon footprint; and innovative renewables such as new biopolymers, regenerated cellulosic's, and Modal/Micromodal. These textiles are designed to reduce dependency on oil and promote more sustainable renewable resources. Furthermore, it promotes processes such as natural dyeing, metal free chemical dyeing, and good water management systems to reduce impact on the environment and resources.

There are examples of NGOs working on sustainability as well. For instance, Redress, which was established in 2007 in Hong Kong, is a NGO with a mission to promote environmental sustainability in the fashion industry, by reducing textile waste, pollution, water, and energy consumption. Their work is grouped into four key programs: The EcoChic Design Award, The R Cert, Consumer Campaigns, and Industry Engagement. These four key programs cover a sustainable fashion design competition, a recycled textile clothing standard, workshops, clothing campaigns, fashion shows, exhibitions, seminars, and research. They collaborate with a wide range of stakeholders, including fashion designers, textile and garment manufacturers, retailers, schools and universities, multilateral organizations, governments, NGOs, financial institutions, and media organizations (REDRESS, n.d.).

5.5.7 Examples from Turkey

Sustainability does not have a short history or a background but in fashion industry it is recent, especially in Turkey. As per the examples given above, it has been mostly practiced and discussed in Western and Northern Europe and in developed countries. When we look at the examples of sustainability practices in Turkey, there are few people, companies, brands, and institutions who work on sustainable fashion. Therefore, the initiatives and examples are limited. However, meeting notes and interviews show that discussions have started and there are interesting developments. Therefore, it is a new topic but a topic gaining importance in Turkey. In this section, I include examples from Turkey context.

The Country Office of Regional Environmental Council (REC), an independent international organization, is one of the first non-governmental organizations which started to work on sustainability in Turkey. They started

organizing swishing or clothing swapping events, which they call "Alış-Değiş." The first one of these events was carried out in Ankara, in June 2012 and the second one was held in October 2012, in Istanbul. The third swishing party in Turkey was organized by Sustainability Consultancy S360, together with advertising agency Vagabond, on 15 October 2014, during Istanbul Fashion Week. These events help to support sustainability and recycling; and attract attention to sustainable fashion. They hope to change shopping habits; encourage sustainable consumption; and contribute to circular economy by exchanging clothing items without a fee (S360blog, October 16, 2014).

Istanbul Moda Academy (IMA) in Istanbul is another initiator in Turkey. In 2011, the Academy organized a workshop on sustainable fashion in Istanbul, in partnership with London College of Fashion's Centre for Sustainability and REC. IMA also carries out competitions related to sustainability in partnership with leading brands, which help to increase awareness in the industry and among consumers. For instance, a competition was held for design of an environmental friendly fashion website for H&M. The concept of the competition was "Eco-Friendly Fashion" (Doğa Dostu Moda).

Ekoteks Laboratory founded in 1998, with investment of IHKIB (Istanbul Apparel Exporters Association), tests all the products that come to Turkey and all the products that are exported. It tests if the products and what they contain are hazardous for health and provides surveillance of some dyestuffs banned on textile and ready-made apparel products. It also supports the exporters to develop R&D activities and to set up an infrastructure for product development. Orta Anadolu Group, a denim manufacturer in Turkey, also has interesting projects on sustainability. They made a presentation in *Green Business Sustainable Business Summit* in 2014 (Consultant, male, 30s).

Luxury brands started to take action in Turkey as well. For instance, one of the speakers at Marketing Summit, themed "Change the Game" held at Istanbul in December 2014, was the Marketing Communications Manager of ARMAGGAN. She talked about *The Slow Fashion Movement*, giving examples from luxury sector and slow design. Combining original contemporary designs with traditional and sustainable production techniques, ARMAGGAN produces exclusive hand-made

jewelry, objects d'art, naturally dyed textiles, leather goods, and home textiles, taking the lead in slow design and production movement in Turkey. She stated that slow design, slow fashion, and slow production represents a mind changing perspective in retail which enables companies to protect the environment as well as the needs of the society.

There are now companies who make use of local resources as well. The government provides funding and textile companies make use of these funds to establish factories in regions that need development. They also make use of the local labor force, helping the regions to develop. For instance, Mudo, a leading fashion, furniture, and home decoration retailer with more than 2000 employees and more than 100 stores in Turkey, runs a project with United Nations Development Program, to provide jobs for women in Southeast Turkey. Together with UNDP the company provides support and works with designers such as Gamze Saracoglu, Hakan Yildirim, Mehtap Elaidi to provide jobs for local women living in less privileged regions of Turkey (Assistant consultant, female, 20s).

There are also initiatives by brands, smaller in scale. For instance, GARDEN OF DENIM DESIGN, "G.O.D.D" is a denim brand from Turkey, which uses recycled materials. It made its debut presentation at "WHITE" Fair in Milan Fashion Week. They use industrial wastes such as inner tubes of trucks and bicycles and turn them into readymade garments. The upcycled products from Turkey attracted attention in the Italian market (G.O.D.D Design - Garden of Denim Design, n.d.). The designer of the brand stated that when she started her own brand in 2010, her aim was to have an eco sustainable brand. She first presented at a showroom in Milan, as part of C.L.A.S.S. network.

Every season she uses different materials in her collections, such as organic cotton, industrial waste, recycled materials, and materials with minimum synthetic content or at least recycled synthetics such as recycled pvc. For instance, she made trims, accessories, belts, and bags from inner tubes of car tires. Last season she made use of printed circuit boards that were thrown as waste. Her last collection gigabyte was based on this concept, combining technology, fashion, and sustainability. She made bags, shoes, and accessories from waste circuit boards. She also underlined the

importance of using local resources, local production, and handcrafts, as part of sustainable fashion (Designer, female, 30s).

Mending is in our culture. This is what our grandmothers used to do. They made mats from old socks. We lost a generation in between. We lost the generation from 1980s till 2010s. During the past 30 years people have forgotten the mending culture. However, upcycling can help to recreate this. If we make a notebook from used papers people may prefer to buy it (Freelance designer, female, 32).

Another example is a freelance artist, who has upcycling projects and workshops in Istanbul. She refers to waste as "disregarded objects" ("vazgeçilmiş objeler" in Turkish), as she believes that "waste" has a negative connotation. She argues that we can make use of things before they become waste. In this regard, upcycling adds value and a new use to disregarded and thrown objects. Upcycling can further be used to help bring back the mending culture, which we already had.

She is working to create a platform for environmental awareness through participatory creative activities; establish a meeting point for the participants to share ideas and skills; initiate a collaborative network to generate new ideas for sustainability promoted by joining art and nature; make connections with the elderly to reach to ancestral knowledge; and become a bridge to ensure the survival of this knowledge. She hopes to make use of local knowledge and reclaimed materials without limitations of commerciality (Freelance designer, female, 32).

Another interesting example is a philanthropist action of a manufacturer in Izmir, Turkey. They allocated a room for elderly women who use left-over materials to make products. Other textile companies in the region also provide them with left-over textiles and scrap fabric. They have their own sewing machines. They make whatever they want with these waste materials and sell them to earn money. The owner of the manufacturer calls them the "Golden girls." This small upcycling project can set an example to other manufacturers to make use of textile waste from production.

There are other little movements and initiatives as well. For instance there are second-hand and vintage bazaars at Karaköy, Istanbul during the weekends. The Repair Society was represented in the 2nd Istanbul Design Biennial, in October

2014. The Repair Manifesto in Istanbul invited participants to rethink about the idea of repair and imagine what the society would be like if we assigned a central role to repair and mending.

Nejla Güvenç, a Turkish fashion designer, is another example. After being in the business for many years, she launched her own label, NEJ, in 2002. She uses organic fabrics, such as silk, linen, cotton and leather. Her eco-friendly collections are sold in different countries in Europe, such as France, England, and Sweden. She was the Creative Director of an Environmental Consciousness Project, where designers used idle and unused electronic devices and components to design clothes. Cables, earphones, electronic devices, computer cases became colorful clothes and necklaces. Guvenç also gave a seminar on eco fashion in April 2013, at IMA, covering topics such as ecological branding, ecological journey and organic materials.

Fashion designers Sena Cevik and Seray Cengiz also work on ecographic fashion. They decided to start an eco-friendly fashion label, Boa Studio in 2007. All the design and production is done at a family-owned factory. The products are designed to become part of everyday life, produced with 100 percent eco-friendly fabrics and certified 100 percent organic cotton. Furthermore, all the designs are hand printed with water-based dyes. The latest collection of the brand is a special line which uses 100 percent bamboo fabric, one of the best-known sustainable fabrics. "Boa Recycle" is one of the brand's responsibility projects aimed at collecting and reusing waste. During the production stage, they collect the waste fabrics and then transform them. Currently, the label can be found in major designer stores and boutiques in Turkey (Alphan 2012).

Some of the bigger groups plan to have upcycling workshops to increase the awareness of their workers and to make use of waste materials. Workshops and platforms uniting students and people from different fields and universities help to increase awareness on issues related to sustainability; and enable sharing of knowledge and cooperation (Freelance designer, female, 32). These attempts show that the big companies are becoming interested in the topic as well along with the initiatives by smaller brands and designers.

Despite all the examples, both abroad and in Turkey, there is still a lot of work that needs to be done. I offer some remedies in the discussion chapter. However, before moving on to discussion, in the final section of the findings chapter I provide an overview of the initiators of change, who are influential in the emergence of the new market.

5.6 Initiators of Change

There are conflicting perspectives on the initiators of change. According to some, big groups, big brands, and powerful retailers can become the initiators. Whereas others believe that designers play an important role as initiators of change. Some trust the influence of luxury brands. There are more pessimistic views arguing that change will be the result of a major crisis, disaster, or a consequence of self-implosion of the current system. Some think that it will be the result of a social movement, public pressure, and a big consumer demand; and the new market can only become sustainable if it becomes a lifestyle. Finally, according to others, change is more likely to be the result of shared responsibility. In this section, I discuss these different perspectives in detail.

5.6.1 Designers as Initiators of Change

Design and aesthetics are important in drawing attention to and in promoting sustainability and designers have an important role as initiators in changing the way the garments are made. Scott Mackinlay Hahn, social and environmental entrepreneur and co-founder of Loomstate and Rogan, states that designers are responsible for the impacts of the products they design (Fashion +, November 13, 2014). Therefore, it's important for designers to act as leaders and problem solvers and start a conversation about thoughtful consumption and how industry can create change through responsibly made products (Muir 2013; Matus 2014).

I was doing some research and I discovered: 10,000 were dead from pesticide poisoning, millions of people are working in conditions of slavery, contamination of the water supply. I picked fashion because I thought it was harmless. And then I find that I am actually working in one of the most hideous industries. It was a bit of a bummer... I thought I'd just say, "Hey folks, this is happening, it's dreadful, let's change it." Nah-uh. Thirty years later, still battling (Katharine Hamnett, fashion designer, from an article by Pithers 2014).

One of the best examples in this regard is Katharine Hamnett, the pioneer of the slogan T-shirt, who launched her brand in 1979 and built it into a big business. In 1989, she became aware of the negative conditions and consequences of the fashion industry. Since then she has been trying to change the industry from within. She admits that it is not easy and she is still trying but there have been developments, such as the conscious collections.

I first met Nudie's founder Maria [Erixon Levin] when she was working at a small shop outside Gothenburg. She'd been working with denim for many years. She said "Palle, let's do our own jeans." She was fed up with the commercial side of things because everything was looking at the short term. Her idea was that instead of just looking at profit, let's do the jeans the way we want them. I said "yeah, let's do it" (Palle Stenberg, CEO of Nudie Jeans, from an article by Borromeo 2014).

There are other examples from within the industry, such as founders of Nudie Jeans, who were fed up with the commercial and economic aspects and short term vision of the business. Such examples are important because as Hamnett addresses, people will always buy clothes. Therefore, the industry needs new fashion designers who are going to make clothes sustainably (Pithers 2014).

Whatever the producer makes the consumer buys. Fashion is an industry which depends on what the designers design. If they start a trend like this it will become popular among people sooner or later. It is important to have the labels as well because people become familiar by seeing. For instance, they learn what organic cotton is from the labels. It seems like green washing now because green is being used as a marketing tool but it will be internalized by people as time goes on (Assistant Consultant, male, 30s).

Informants also believe that designers have an important role as change agents. Fashion industry depends on what the designers design, as that is what the producers make and the consumers buy. Therefore, some believe that if designers start sustainability as a trend, it is likely to become popular among people and the

industry will follow the footsteps of the designers. Furthermore, even if sustainable fashion starts as a trend by designers, it does not have to remain as one.

A fashion designer is a person who creates clothes; a good fashion designer is a person who creates beautiful clothes that sell well and are made in a conscious way. The biggest misconception about sustainable fashion is that it is a trend. In my opinion, sustainability is forever linked to fashion. In a perfect world, fashion would not create any waste (Kévin Germanier, Eco Chic Design Award winner, from an article by Chua September 2, 2015).

The winner of the 2014/2015 Eco Chic Design Award, UK based designer Kévin Germanier also believes that sustainable fashion is not a trend. He underlines that it is the designers' responsibility to respect the relationship between fashion and sustainability. Consequently, fashion designers have started to take a critical view of the current fashion system. For instance, "The Future of Fashion is Now" comprises an online platform for the future of fashion and an exhibition at Museum Boijmans Van Beuningen in Rotterdam. The project focuses on stimulating experimental developments in the fashion world and to discuss topics relevant to the future of fashion. Fast Aesthetics, Sustainability in Fashion, Fashion and Nature, Fashion's Relation to Consumption are some of the topics being discussed (The Future of Fashion is Now, n.d.).

Furthermore, LCF's Centre of Sustainable Fashion is collaborating with I-D magazine in an ongoing project, I-Sustain, which aims to offer insight into designers who combine intellect and aesthetic look towards a better fashion future. The project aims to change the way we think, buy, wear and discuss fashion (McIntosh 2012). Design and aesthetics are important for the success of sustainable products. In this regard, Eco Chic Design Awards evaluate if a design is sustainable and at the same time aesthetically beautiful, encouraging designers to make beautiful sustainable products.

We have been really proud to work with the Topshop team on Reclaim to Wear collections, inspiring them to include upcycling as part of their practice. This is really an important step. One dress at a time, starting small, we are beginning to see

that design can influence not just our style, but the way we think about clothes (Orsola de Castro, from an article by Ettinger 2014).

Similarly, Orsola de Castro and Filippo Ricci of "From Somewhere" address the importance of design in influencing the way we think about clothes. The Reclaim to Wear Collection that they designed in collaboration with Topshop shows that collections can be made from textile waste, as addressed in the examples section.

Designers are important in increasing awareness as well. One of the freelance designers interviewed stated that this is the main purpose of the upcycling workshops that she conducts. Retailers also help to enhance awareness with the sustainable collections that they launch. For instance, Conscious Collection launched by H&M tries to attract attention to the importance of nature and environment. Even though there is lack of trust in the sincerity of these efforts, they are important steps. H&M, for instance, has so many stores all around the world that even though the collection is a capsule one, it can still help to increase awareness of many (Product Developer, female, 30s). Therefore, despite the fact that these efforts may seem small, every little step helps to build awareness and the designers have an important role in this regard.

The designers can have a role as initiators. For instance, Bora Aksu has worked together with a firm in UK on an eco fashion project. In Turkey, Hatice Gökçe can be an initiator. She is not doing eco fashion but she considers the social aspects of fashion. However, all the designers may not be this cautious. The design industry and fashion design is very new in Turkey. It has around 10 years of history. Before that, we often called tailors or artisans as designers. They did not have design education... (Academic Director, female, 42). (Rest of the quote is related to copying.)

Context is important as well. For instance, there are not many designers in Turkey who work on sustainable fashion but Bora Aksu, a Turkish designer living in London works on some projects with designers from IMA in Turkey (Consultant, female, 30s). He also worked together with a firm in UK on an eco fashion project. Hatice Gökçe, another Turkish designer, also considers the social aspects of fashion.

However, the developments are not as noteworthy as in Western Europe because economic concerns are more prevalent in Turkey. On the other hand, there are still some signs of sustainability and small steps are being taken by designers.

5.6.2 Big Brands and Retailers as Initiators of Change

According to some of the informants, it is necessary for big groups and powerful companies to take action for sustainable fashion to diffuse to masses. If these big brands improve for instance the production standards or the working conditions at their suppliers, it will make a huge difference because by setting an example they can help the industry to develop as a whole. Furthermore, actions of big brands such as conscious collections and code of conduct procedures help to increase awareness of both the institutional actors and the consumers.

Respect for the environment is an integral part of H&M's business and we work actively to limit the impact that our business and that of our suppliers, stores and logistics centers have on the environment... (Emily Scarlett, PR Manager for H&M Canada, from an article by Chandak 2014).

H&M, the world's second largest fashion retailer, which has around 3,500 stores in 55 countries, is the leader in sustainable fashion (Meepos 2014). It has made great progress in the last decade and regularly comes first in industry surveys on sustainability (Champ 2014). Even Greenpeace has called the brand a "leader" within its field (Bowman 2014). Analysis of the findings also shows that H&M works in a way that is conscious of the environment, the rights of its employees, and the workers of its suppliers. They are the pioneer in establishing ethical standards and they set an example in this regard.

H&M's business concept is to offer fashion and quality at the best price. To them, quality means running all their operations in an economically, socially, and environmentally sustainable way. By making more sustainable choices available to their customers, they aim to contribute to a more sustainable fashion future (*PRNewswire*, March 19, 2015). Pierre Börjesson, H&M's senior sustainability specialist, explains at Vancouver's Eco Fashion Week that, H&M's goal is to have all its cotton from more sustainable resources, including recycled or organic, by 2020 (Hyslop 2014).

...We have seen really strong reactions from our customers, employees, and stakeholders. Our staff tells us they appreciate working for a company that has a sustainability focus and they like educating customers and friends on the work we do... (Emily Scarlett, PR Manager for H&M Canada, from an article by Chandak 2014).

There are many other examples of H&M's efforts to have a more sustainable fashion system, as addressed in the examples section. The retailer has been working to make sustainability a core part of its operations (Business and research manager, male, 40s). It created a sustainability strategy in 2009, which includes broad commitments such as being "climate smart", adopting the "reduce, reuse and recycle" philosophy, and strengthening communities, as part of its Conscious campaign. H&M's sustainability principles and actions have been praised by its customers, employees, and stakeholders.

On the other hand, largest retailers that support sustainability, such as the Swedish brand H&M, are often associated with fast fashion (Chandak 2014). Therefore, according to some of the informants and meeting notes, they are likely to use sustainability as a marketing tool and set an example in this regard. Consequently, in the future many retailers may have separate departments selling sustainable clothes even if it becomes a part of their business and used as a marketing tool.

Being a big player there is more of an opportunity to make a change. When you're smaller you may not have that opportunity to do so (Pierre Börjesson, H&M's senior sustainability specialist, from an article by Hyslop 2014).

Pierre Börjesson, also underlines the importance of being a big player in initiating change, as small companies and brands may not have the opportunity to be able to shape and change the system. Similarly, meeting notes and interviews reveal that as big fast fashion brands and retailers have huge power, they have an important role in initiating change and in setting an example both for other smaller brands and

their suppliers. Consequently, along with big retailers small or medium size retailers become interested in sustainability efforts.

...We know these brands have huge power. They could spend the next 10 year period convincing everyone that what they should do is to buy old clothes. We know Topshop could become an exchange center, where people bring clothes back and they revise them as new. They just have to rethink the model but it has implications and it takes a lot of thought and right now the speed of things does not really allow time for thought (Business and research manager, male, 40s). (The beginning of the quote is used at affordability section.)

Topshop, the famous British clothing retailer, operating more than 400 stores worldwide, is another fast fashion retailer which follows a "sustain" initiative that aims to embed sustainability into the brand's business model through local sourcing, upcycling, and environmentally friendly processes (Ettinger 2014). The retailer actually has the power to sell only vintage products if it spends the time and energy to change its business model and stop considering itself as a brand which only provides new fashion and copies catwalks. If it wants to, Topshop can convince consumers that they should buy old clothes. It can become an exchange center, where people bring clothes back and the retailer revises them as new. Therefore, brands and companies which have power like Topshop, need to take action and help the consumers to think and act differently.

...Manufacturers especially denim firms and fabric manufacturers are also involved. They have big orders from foreign firms. They need to meet certain standards to be able to sell abroad. Sustainable fashion will develop as a result of these obligations... (Academic director, female, 42). (Rest of the quote is related to consumers as initiators of change.)

Furthermore, change has a domino effect. For instance, big retailers issue sustainability reports and set targets which they need to meet, such as decreasing carbon emission or using a higher percentage of bio cotton in their purchases. They develop strategies to attain these targets, which influence their suppliers, as they need to meet certain standards and requirements to be able maintain their business

(Academic director, female, 42). Consequently, big brands have an important role as initiators because as they become sustainable their suppliers need to become sustainable as well (Assistant consultant, female, 20s). As a result, manufacturers' awareness of supply chain issues is increasing as a result of retailers' concern. Producers have started to work collaboratively with the brands in creating systemic change, improving the process, raising awareness, and training people.

I do believe that ultimately at some point it will start to self implode but a lot of people have invested interest in stopping that happening. On a bigger scale, when we look at the last seven years and the economic crisis that occurred in the finance system, that kind of high risk and high speed trading process has led us into an incredibly disastrous economic situation. The reality is that we all knew it profoundly impacted the way financial management system and financial trading system operates but at the same time there are so many people whose lives depend on it that they make sure there are ways to which that it can't beat us up anymore because it is based on a way of working that is bordering on a legal. In the case of fashion, in lots of ways it is bordering on a legal as well because we get things like Greenpeace consortium. People are doing things because they want to do them quickly but they are not really managing the process properly. So I think it takes really good brands and manufacturers and people who have a personal interest in doing things well to lead and set a good example (Business and research manager, male, 40s).

A lot of companies, institutions, and people have to support the current fast fashion system because their lives depend on it so they need it to continue, even if they know that it will lead to a disastrous situation. Therefore, it takes good brands, retailers, and manufacturers that have a personal interest in doing things well, to lead and initiate the change.

5.6.3 Luxury Brands as Initiators of Change

Luxury designers and brands are often associated with sustainability because in general luxury products are higher in quality and can be used for longer. Fast fashion companies can emulate luxury products; however, they are less able to meet high ethical standards in sourcing, manufacturing, and distribution. Consumers demanding more information about sourcing and manufacturing are more likely to

pay a premium for such products. Similarly, consumers who demand unique pieces with higher quality are likely to pay a higher price. Therefore, luxury fashion brands can play a role in the transition of the fashion system by counteracting some of the problems of fast fashion and by achieving the ideals of both fashion and sustainability (Joy et al. 2012).

One of the examples in this area is Kering Group, which owns high-profile brands, such as Stella McCartney, Gucci, Bottega Veneta and Saint Laurent, among others, that create apparel and accessories for the luxury market. The Group is also known for its commitment to environmental and social sustainability. François-Henri Pinault from Kering, explained the ethical and ecological standpoint of his luxury conglomerate and its aim to discover new, cleaner, smarter, and more humane ways of delivering the industrial products. According to Pinault, "*corporations can move things much better than governments*" (Mower 2014).

Marie-Claire Daveu, the chief sustainability officer for the Kering Group, said that Kering aspires to become the world's most sustainable luxury goods conglomerate. This ambition of Kering group will also help to show that ethical brands can actually be high fashion (Rickey April 24, 2014). Furthermore, the Group announced an educational partnership with London College of Fashion's Centre for Sustainable Fashion. Kering's experts in sustainability contribute to the academic curriculum of London College of Fashion and launch a competition across business and design to reward the most agile problem-solvers (Mower 2014).

Fine jewelry customers can afford to pay slightly more for a sustainable product. If designers demand better quality raw materials suppliers will have to make them. It is my hope that this creates a shift in the supply chain where more responsible raw materials are readily available. I think this is an important step in the movement and one that accessories and jewelry in particular, can lead (Melissa Joy Manning, Sustainable designer, from an article by Matus 2014).

Sustainable jewelry designer Melissa Joy Manning, an eco-conscious designer, states in an interview that it's up to luxury designers to lead by example and create beautiful, thoughtful, and responsible design. She employs environmentally and socially responsible practices, which shows that luxury and

beauty can exist along ethics and responsibility. All of her jewelry is made in own studios in California and New York, caring about waste treatment and energy usage. Furthermore, all of the raw metal is 100 percent recycled and is purchased from a certified green refiner in the US. Manning argues that if designers demand better quality and more responsible raw materials, suppliers will have to make them, which will create a shift in the supply chain (Matus 2014).

Furthermore, some of the informants believe that luxury brands and designers can be the initiators because they are being followed and copied for design by major fast fashion retailers. Therefore, if luxury retailers and designers start sustainability as a trend then the retailers that serve the mass segment will follow, which will help to spread it to the masses, preventing sustainability to remain only as a luxury trend.

5.6.4 Crisis and Tragic Events as Initiators of Change

There are more pessimistic views arguing that the change can only be the result of a major crisis, disaster, or as a consequence of self-implosion of the current system.

The system can slow down if there is a big economic crisis, worse than the one in 2008. The value that has been created in the world in recent years is based on consuming all the time. This system will come to a deadlock somewhere. There will be a major crisis; maybe the whole financial system will collapse; or there will be a war. This will end this endless consumption. It cannot continue like this forever. It can continue for another 5 or maybe maximum 10 years. The capitalist system and the economic politics in the world try to promote consumption but it will explode and people will start to spend less and consume less or maybe even will not be able spend. Eventually we will go back to the old system because this wastefulness can't continue. Everyone is shopping using credit cards and credit from their future. This system needs to stop. If it will continue like this it will create risks in people's lives. People will eventually realize that it is wrong but I don't know when and how it will change. They are arguing that a new financial system needs to be established in the world but no one has come up with an alternative yet. Therefore, the same system is continuing. It is the same for fashion. Fast fashion will continue till the system explodes because the big capital owners like Zara and H&M, and designers who earn money from this, are ensuring that it will continue. When these people start not to earn any money than the system will change (Merchandiser, male, 42).

According to some of the informants and field notes, the current system based on continuous consumption cannot continue like this forever. At some point it will start to self implode and is likely to collapse. However, a lot of people have invested interest in stopping that happening and as long as the big capital owners and brands continue earning money from this business, they will ensure that the current system will continue. Once they stop earning money, the system will change and people will then start to consume less but this is only possible if the system explodes.

It would be so nice if it is realizable but I do not believe that it will happen. It is all to do with the economy. Everything is consumed so quickly. Values have changed. Only if there is a war, like my dad says, or a big crisis, then people have to deal and live with poverty, famine, and shortage. Only then this consumer culture may change. My dad grew up at time of war and he mended and kept using his clothes. He never understood people buying something new every week. Most of the consumers now are not aware of the negative consequences of consumption. Tests are being done for dyestuff so that the end product will not have any hazardous dyes but those chemicals diffuse into air and water during dying process. Workers who apply the process often get ill. They often get cancer so it is obvious that they are hazardous but it is hard for people to perceive this. Especially the young generation who has not experienced any famine or poverty cannot foresee the consequences (Sales Manager, female, 41).

On the other hand, it is not easy for the current system to collapse. Only if there is a major disaster such as a war or a big crisis, it is possible for this consumer culture and current fast fashion system to change. People will then become more conscious and start to consume and waste less and become more sustainable.

Tragic accidents are likely to initiate change as well. For instance, Triangle Shirtwaist factory fire, which happened in New York in 1911 and killed 146 workers, led to a unionized, safe garment industry. Similarly, Bangladesh's tragic Rana Plaza factory collapse in 2013 has become a turning point for the 21st Century. It resulted in significant steps taken by individual companies and European and American coalitions to improve the safety of the garment workers in Bangladesh and to ensure that the clothing supply chains are more ethical and transparent (Godelnik 2014).

Since the Rana Plaza building collapse more attention has been paid to working conditions of apparel factories and the standards of the brands doing business. Companies are more concerned with the wellbeing of workers mainly due to fear of bad press or loss of business, but regardless of the motive, retailers and brands have come together to form agreements to improve working conditions and protect workers' rights, such as the Alliance for Bangladesh Worker Safety and the Accord on Fire and Building Safety in Bangladesh (Hertzman 2015).

Consequently, after the tragedy fairness in fashion has become a more important issue. Safia Minney, founder and CEO of fair trade and sustainable fashion label People Tree, looks at the role to play to promote fairness in business. Full transparency and accountability is required for consumers to know that the products they buy support the people and the planet in a responsible way (Fairtrade Blog, September 30, 2014). Similarly, according to Andrew Morgan, the director of the film *The True Cost*, the Rana Plaza disaster was a call to action. It became a symbol for the global inequities behind cheap clothing (Chua May 19, 2015).

That is when real innovation happens because that is when we have to tell ourselves "ok I am going to rethink the business model and work out the ways and places where we can really make effective profit; the places that we have to develop the services that relates to our product rather than just the product itself." That is when people really get creative; what we see in times of recession. The economy shrinks and suddenly all these interesting new businesses spring out because people go "oh, now I have to think differently. I just can't do the things as they have been done before because the way they have been done is not working anymore and the economy is under this enormous stress." So those are always the moments when we see the best ideas emerging. So for me I think this is a big economic issue that we have to tackle (Business and research manager, male, 40s).

On the other hand, sometimes crisis can become an opportunity because when the economy is under stress or when there is a recession, the best creative ideas and real innovations emerge; new businesses spring out, as people realize that the current model or the system is not working any more. Consequently, tragic events and crisis are likely to initiate important change efforts in the fashion industry.

5.6.5 Consumers as Initiators of Change

Even though the main focus of the study is institutional actors, all the informants are at the same time fashion consumers and according to some, conscious consumers can have an important role as change agents. Informants who share a more pessimistic perspective think that, it is not likely for the institutional actors, especially the retailers, to cooperate in order to slow down the system. Similarly, some of the secondary data also confirm that a big consumer demand or a major disaster or a crisis can initiate the change. I discussed the influence of tragic events and crisis in the previous section. In the following paragraphs I examine role of consumers.

On the consumer level, individuals and society as a whole have begun to question the existing consumer culture that has prevailed for many years (Prothero et al. 2010). As a result, they started to support a more non-materialistic view and promote sustainability for macro reasons such as global effects of consumption, or for more micro-level, personal concerns (Prothero et al. 2010).

The Rana Plaza tragedy did not affect the worldwide clothing sales but it led consumer consciousness to grow ever since. Consumers started to question the brands that behave irresponsibly. They started to respect craftsmanship, authenticity and transparency. There are millions of people who love the constant newness of fashion, but now there is a new group of consumers who value the beauty, the story, and the design. Discussions on ethics heightened when a customer found a "hidden" message sewn into a £10 Primark dress by a factory worker, which said "forced to work exhausting hours" (Champ 2014). Consequently, a very influential, well-educated minority has emerged demanding humane products and transparency from fashion brands, leading to a shift in the system.

The Belgian designer Bruno Pieters, who was formerly the art director at Hugo by Hugo Boss, and who now has a label based on total business transparency, states that today, there is a new generation of fashion brands, driven by designers with a vision of culture, youth, and future, but unfortunately they fail to include sustainability in their business models and production. He argues that consumers need to make and demand better choices for the industry to evolve. The conscious consumer, who demands to know the story behind fashion products, could initiate the

change for transparent and ethical production. According to Pieters (2015), smart brands will seize this opportunity to gain this new consumer group and market.

Similarly, WGSN's (Worth Global Style Network) Autumn/Winter 2015/2016 consumer analysis and insight, draws attention to topics such as longevity, change in consumption habits, mindful consumption, transparency, repairing, and mending. According to the analysis of the leading fashion and consumer trend forecasting service, consumers are becoming more conscious and increasingly considering the sustainability of their purchases. They are more interested in what they buy, where they buy it from, and why they buy it. They started preferring brands that are more transparent and environment friendly.

Furthermore, consumers are shifting to products that they can use for a longer period. They also prefer products that they can adapt from day to evening. Demand for long term products is replacing short term items. According to futurist Paul Saffo, we are now entering into a new phase of capitalism where consumers question and research. They started questioning the economic systems and success of capitalism. Many consumers will soon prefer flexible brands that bring long term solutions to big problems and that can adapt to changing conditions (WGSN Consumer Briefing, October 31, 2014).

I think consumer demand will be one of the main initiators because Turkish market is very big. We also have targets for exports but if we think about the crisis in the world, Turkish market and consumers become important as well... It will take time for consumers to develop awareness but it has started. Before, we did not look at labels, we were not aware of what we were buying. If we look at the results of market research today, we can see that consumer awareness is increasing, which will have an influence. It will have benefits but I am not sure if the developments and awareness will be quick like in other countries. It may sound a bit pessimistic but I do not think that this change will be quick (Academic director, female, 42).

There is a cultural shift, especially in Western countries, and more people are becoming interested in sustainability issues (Business and research manager, male, 40s). Healthy and sustainable lifestyles are becoming more important. There are now consumers who do want to spend money on items that they will not wear or wear for

a few times, even if it is cheap or affordable. Consumer awareness is increasing in the Turkish market as well, which will have an effect on the system to change. However, this shift isn't happening fast and it will take time for consumers to develop awareness because it is not easy to educate or change people (Designer, female, 28).

Some of the informants also acknowledged that they started to be satisfied with nonmaterial things in life rather than shopping for fashionable items. Soon, it will not be all about buying and wearing. If both retailers sell similar products then the consumers will prefer the healthy and ethical options. The competition will not be only based on being trendy but also on being conscious (Research and developer, female, 30s). Consequently, in the future technology, sustainability, and using materials of good quality will become important success factors in fashion.

Furthermore, consumers participation is also necessary for the new system to succeed. If we take the example of reuse and recycle, experts state that within the textile industry, new recycling techniques and reuse ideas are required. In a "closed loop" system of production, the textiles could be processed and made back into new yarn, textiles, and clothes over and over again. Governments, organizations and companies have a responsibility to make this happen but their efforts alone is not enough. Consumers also need to change their way of consuming and participate in the new recycling and reuse systems to make the system sustainable (Gould 2014).

As a result, there are conflicting perspectives regarding who will initiate the change. If there is a transformation in companies than the consumers will follow this change. However, it can also happen the other way round as in the case of Greenpeace starting protests against major retailers. Therefore, initiators of change can be public pressure and public awareness, which will encourage the retailers and manufacturers to become more sensitive. Finally, change can be the result of shared effort and responsibility as addressed in the next section.

5.6.6 Shared responsibility

Sustainable fashion requires numerous stakeholders to build the system necessary to influence mainstream fashion. These stakeholders include not-profit organizations to provide resources and support; and governments to create the

regulations necessary to encourage ethical enterprise, fashion retailers, and consumers (Chandak 2014).

I have always thought of the company as being more than about the clothes. Creating meaningful impact in the world is at the heart of it. Business has the power to make a difference, and can be a movement around social change... [But] we are all in this together. We not only need the fashion companies to change; we need consumers to change their mind-set about clothing. It starts by stopping to think about what we are buying and how good it is. How long it might last. Does it belong to just this moment? For me, it is about simplicity. If it is simple, it can be worn in over time in multiple ways (Chua January 6, 2015).

Designer Eileen Fisher, addresses the role everyone plays in creating a sustainable fashion industry. Businesses have the power to make a difference but it is not enough for companies to change. Consumers need to change their mind-set about clothing as well. Moreover, institutions also have an important role in initiating change efforts. For instance, The Centre of Sustainable Fashion at LCF was set up to respond to the fact that the fashion industry was facing a crisis. Their aim is to find new ways of behaving and interacting with clothes. Alex McIntosh from the Centre addresses that their skills as communicators give them the power to influence change (McIntosh 2013).

Similarly, Nordic leaders have come together for a greener fashion industry and launched a scheme to position Sweden, Norway, Denmark, Iceland, and Finland as leaders in sustainable design, production, and consumption. The action plan seeks to create a circular economy for garments and textiles by 2050. Kirsten Brosbøl, Denmark's minister of environment argues that "*sustainability must not be an accessory. It has to be straight to the core, and it should be in every fiber*" (Chua April 28, 2015). Therefore, it is important for all the actors to be involved.

I think it is a shared responsibility. It is something that involves change in so many different levels. It involves each of us as individuals, reflecting on what we do, which means brands can use their power and energy to influence consumer behavior in a positive way. That means they are going to have to look at their business models and work out what it means if they encourage people to buy in a more considerate

manner and what they can offer that will allow them to remain profitable, and that feeds back into the manufacturers and how the manufacturers work to be able to facilitate that change in the brands model and that feeds back into the chemicals and the raw materials and ultimately we are not going to do things better until we make a bit more space to do them better (Business and research manager, male, 40s).

Some of the informants also state that it is a shared responsibility and involves change in many different levels such as individuals, brands, manufacturers, and suppliers. All the actors in the supply chain have an important role since every step of the production process is important.

On one hand, it will be very difficult to educate people again, but on the other hand we need change because we have got quicker and quicker. Everything has become trendy. Before, trends repeated at most once every ten years but now this season's trends become a trend again the following year. The cycles got quicker. I think we really need people to change. Also, we no longer have real fashion. That is why we need to have a new system but I do not know if it will be possible to educate people. It needs to be supported by a big group, by media and so on, not only by fashion companies. It needs to be supported so that people will see the change happening in every area (Designer, female, 28).

It is not enough for one of the actors to change. Change needs to happen in all disciplines. It can only be possible if it is supported by big groups and different actors, such as media, not only fashion companies. Prior literature also supports that market creation requires collective action of and investment from several interested actors, including consumers (McRobbie 1997; Cataldi et al. 2010; Struben and Lee 2012).

This is a chain. Someone needs to put a target so that all the others can follow. I have seen that lots of developments have happened in fashion in the last 15 years. This will work as well. When a system is first built, there is always a reaction, resistance and people will always have a negative approach at the beginning. But then as time goes by everyone accommodates and gets used to the new system and

becomes a part of it. It becomes the standard or routine way of working (Research and Developer, female, 30s).

Actors often set an example to each other in changing the system. Some of the actors need to be the initiators so that all the other actors can follow. When a system is first built, there is always a reaction and a resistance, but in time all the actors including the consumers and the companies, accommodate and adapt to the new system and become part of it. It becomes the standard or routine way of working. During this process, it is important for the actors to act together as it is a shared responsibility.

5.7 Summary of the Findings Chapter: Response to Research Questions

With the findings chapter I responded to my three main research questions. The first three sections on the main characteristics of the current fashion industry - speed, affordability, and design- respond to the first research question. Addressing the characteristics and dynamics of the fast fashion industry help to understand future prospects of market emergence. Speed of availability and offering latest fashion trends and designs at affordable prices and their positive and negative outcomes shed light on the dynamics that mobilize actors to seek market change.

The fourth section on barriers to mobilization of a sustainable fashion market and the driving factors that mobilize the actors to seek market change respond to my third research question. Some of the barriers and the driving factors are related to speed, affordability, and design but the section also includes other factors that hinder or facilitate the emergence of a new market. The fifth findings section does not respond to any research questions but it provides examples on sustainable fashion practices, products, companies, brands, and designers, to show that a sustainable fashion market and an actor-network actually exists and is mobilized.

The last section on initiators of change respond to the second research question and provide the different perspectives on change agents and their roles in formation of a new market in the field of fashion. In the following discussion chapter, I provide an overview of the conflicting perspectives on future of fashion; summarize the remedies suggested earlier; and propose some new ones that enable and facilitate the mobilization of a more sustainable fashion system.

6. DISCUSSION

Movements on the institutional side, such as actions of individual brands, companies, designers, retailers, and institutions, and some movement on the consumer side indicate a growing interest in a more sustainable fashion system. Both prior literature (i.e. Fletcher 2007; Cataldi et al. 2010) and analysis of the field notes, interviews, and secondary data show that, sustainable fashion is gaining importance, providing opportunities for business to be done in a way that respects the workers, the environment, and the society.

Dynamics that mobilize the actors to seek market change is discussed in the findings section, along with the barriers and driving factors in market mobilization; the initiators behind market formation; and roles of these actors. In the discussion chapter, I provide an overview of future prospects on fashion, including conflicting perspectives related to speed and affordability. Furthermore, I suggest some remedies to overcome the barriers and facilitate the mobilization of the new market.

6.1 Future Prospects on Fashion

There are conflicting perspectives on future of fashion; some are pessimistic, whereas others are more hopeful. From a pessimistic perspective, it is not be possible to trust sustainable fashion to be the future of the fashion system, at least in the short term and by itself. Some of the informants think that efforts to improve the supply chain have a small impact and they do not really change the system. Unless there is a big disaster or a crisis it is difficult and unlikely for the fast fashion system to change and sustainable fashion to influence the actors and the industry. Even if people will eventually realize that the current system based on continuous consumption and production is not working, no one has come up with a better alternative yet. Therefore, fast fashion is likely to continue till the current system explodes.

As a movement, it does not sound illogical. However, I believe that it will be marketed and used for commercial reasons. Fast fashion brands such as Zara and H&M earn a lot of money because they are quick in offering fashion. Therefore, it does not make sense for them to slow down. Ultimately the main aim is to earn money. If I want to promote slow fashion, then I need to attract people who support this philosophy to make it commercial. Therefore, I believe that the same system will continue in the future (Designer, female, 30).

Furthermore, there are economic and commercial ambiguities and concerns. Informants addressed that fast fashion is not likely to end mainly due to economic reasons because this is not in favor of fast fashion producers and big retail brands. As long as the big capital owners like Zara and H&M keep earning money from this business, they will ensure that the system will continue.

It is not possible for the business to continue like this but who is the target customer for sustainable fashion? Who will buy it? Who will the retailers sell it to? Who will make it? It is important to consider the economic aspect. I think these are important issues which we need to think (Owner of a supplier, male, 57).

There are economic concerns on the supplier side as well. Only if fast fashion retailers do not fill the production capacity than suppliers are likely to approach sustainable fashion retailers and brands. Consequently, there are commercial and economic uncertainties about feasibility and implementation of sustainable fashion, which are important to consider for actors both on retail and supplier side.

Some retailers can have ethical and social intentions for having conscious collections, recycling campaigns, or organic clothes, but the main purpose is often publicity. Consequently, there is lack of trust on the actions of retailers to become sustainable, which was addressed in the barriers section. Therefore, it is more likely that big fast fashion retailers will use sustainable fashion as a marketing tool, for commercial reasons, and to further increase their business.

Furthermore, fast fashion retailers like H&M offer their conscious collections together with their fast fashion lines. Consequently, it only becomes their sub-business. Similarly, local designers and vintage remain as a small segment, as big fast fashion retailers still have the largest share of the market. As a result, most

believe that sustainable fashion is likely to become only a niche market and a small part of the fashion system.

On the other hand, there are more optimistic perspectives as well. The current fashion system based on continuous production and consumption and the negative environmental and social consequences it brings about cannot be ignored. Therefore, sustainable fashion as a philosophy will become critical in the coming years. Analysis of the field notes, interviews and secondary data show that fashion industry started to focus on sustainable issues. Examples of sustainable fashion companies, designers, and practices referred to in the earlier sections signify emergence of a sustainable fashion market.

There are improvements on environmental and social conditions through innovative business models and practices such as designing sustainable fibers, launching chemical management programs, enhancing product and supply chain transparency, decreasing product packaging, and promoting textile recycling. However, even though there is some hope, still there are many ambiguities, difficulties, and barriers regarding the future of sustainable fashion. Similar to the conflicting perspectives regarding future of fashion, there are contradictory views on future of speed and affordability, which I discuss in the following sections.

6.1.1 Future Prospects related to Speed

There are conflicting perspectives on future prospects related to speed of the fashion system. According to some, it is necessary and possible for the system to slow down to become more sustainable. Chief fashion critic of the New York Times, Journalist Vanessa Friedman, is among the ones who believe that the current speed of the system based on planned obsolescence is unsustainable. Longevity is an aspect of sustainability and garments that must be discarded after a short time are hardly sustainable. She compares the current fashion system to a runaway train that will eventually crash (Rickey 2014).

Some of the informants also share Friedman's standpoint that the current speed of the system is unsustainable. The lead time is down to four weeks, which cannot get any quicker because the manufacturing process needs a certain time. Moreover, if the speed keeps increasing at the current rate, it will be very difficult for the industry to resolve the impacts on social and ecological environment (Sengul

2014). Therefore, the competition in the future will not only be based on being trendy and quick but also on being conscious of the environment, society, and workers.

Furthermore, quick lead times enable fashion suppliers and retailers to generate more business but also need to do everything urgently increases tension and stress. There is no time for any mistakes. Even a tiny problem causes a delay in the shipment and the ones who are slow are unlikely to survive. Consequently, coping with the fast fashion cycle has become stressful and exhausting, which can eventually motivate the actors on the institutional side to slow down.

On the consumer side, especially in higher-income countries, people are consuming beyond their economic means and beyond the limits of the natural environment. Meanwhile, many others suffer from poverty and hunger in less developed parts of the world. Continuing speed of economic growth leads to depletion of natural resources, accelerating climate change, widening inequalities, posing a threat for future generations. Moreover, speed of consumption requires over production and overwork, leaving little time to live sustainably and to enjoy life (Coote et al. 2010).

On the other hand, meeting notes and interviews also indicate that it is not likely for the fashion cycle to slow down. The technological advancements can enable the system to become even quicker. Despite the fact that business is very stressful and difficult due to speed of the system, it is not likely to become any slower. It is not easy for the retailers to slow down the cycle and offer fewer collections. Even the luxury brands started to offer product lines and ranges that cater to middle class and can be consumed like fast fashion.

Only if all the retailers agree to slow down and offer new products less frequently, then the consumers can eventually get used to not buying something new all the time. However, this is not likely to happen, as most retailers believe that the current system is working. The common perception is that there will always be someone who will work fast; and offer new products frequently; and that someone will earn more. Therefore, the system promotes being fast and it is not likely to slow down. Consequently, for an industry that churns out fashion at the speed of

consumers' changing tastes, slow fashion is an oxymoron (Gonzales January 5, 2015).

...We have got this system where newness and the availability of something that looks like it is different from the thing that was there few weeks before is absolutely necessary part of retail because it is what customers have come to expect. That also has some implications because it means that the speed that the manufacturing has to work at and the potential for research and development is extremely limited. I think that the big paradox or the tricky scenario with fast fashion and sustainability is that there is no space in fast fashion and no time really to understand the multiple ways in which sustainability can manifest itself through... Similar problems apply in other areas. It is not just fashion but fashion is particularly bad. The real challenge is to find the space and the time within that system that operates with such a speed to be able to engage the customer in a different kind of dialogue. For me, part of the dialogue about sustainability is things slowing down. It is actually more consideration, more time spent, more identification with what a person values rather than just buying into every single new trend that comes through. But it is not easy because the reality is that the current commercial model is very successful and fast fashion is very successful... (Business and research manager, male, 40s).

The big paradox between fast fashion and sustainability is that there is no time in the current fashion system to understand the ways in which sustainability can manifest itself through. The speed that the manufacturing has to work at limits the potential for research and development. Therefore, the real challenge is to find this time within the system that operates with such a speed. Big fast fashion brands and retailers have huge power and they can rethink the model but the speed of the system does not allow time for thought. Consequently, the real problem is things slowing down.

I do not think that the cycle will slow down. Before the lead time for an order was four months. Now it can even be produced in a week. It has become that fast. There are technological advancements and if there is consciousness from the beginning then the production can be in line with these standards. The products that we call "throw away fashion" will be produced with this mentality so the same cycle will

continue but the production will be sensitive to environment and everything will be done in a more conscious way (Research and developer, female, 30s).

As a result, it is almost impossible to slow down the speed as the current fast fashion model does not promote slow turnover of investment products. Therefore, some actors started to talk about being sensitive to environmental and societal issues during the production process, so that at least the things consumed will be environment friendly and conscious. Consequently, the same fast cycle is likely to continue but the production will become more conscious of the environment, workers, and the society.

6.1.2 Future Prospects related to Affordability

Economic factors often have a role in consumers' preference for low-cost, affordable fashion. Prior research suggests that, on the consumer side, lack of money is an important constraint that is likely to prevent or limit pro-sustainable because sustainable products are mostly perceived as more expensive, which is a deterrent to their extensive use (Thøgersen 2005; Vermeir and Verbeke 2006; Williams and Dair 2007; Bonini and Oppenheim 2008; Oberthur 2009; Walker and Brammer 2009; Niinimäki 2010; Young et al. 2010). Findings also show that consumers are inclined to choose affordable fashion as opposed to sustainable options, such as local designers or vintage stores, which are often more expensive than high street fast fashion retailers. Therefore, cost is often a critical consideration, especially when desire to get most value for money overrides ethical beliefs or when one is too poor to worry about ethical issues (Eckhardt et al. 2010).

Consequently, fast fashion retailers have become successful by offering latest fashion trends at affordable prices. Furthermore, due to tight margins retailers often put pressure on suppliers which can lead them to disregard ethical and safety guidelines. Therefore, establishing a sustainable fashion system is counter to consumers' preference for cheaper products, regardless of their suppliers and production techniques (McRobbie 1997).

It is my ideal but it is very difficult. It is a crazy task. I need to maintain my brand's standards and the production process is very difficult. Moreover, it is very costly and no one wants to support. My initial intention when launching my brand was to have

a sustainable-ecological fashion brand but now it is only a small portion of my collection; around 10 percent. However, I will continue to do it as it is my ideal (Designer, female, 30s).

I do not only use waste. I also recycle used materials. For instance, I used second-hand army products and mixed it with leather and knitwear to make blazer jackets. I kept the accessories of original materials such as handles. No one will bother with these. It is such a difficult process. However, we sold it as a premium line at good boutiques in Japan. We produced 150 pieces of one style and 172 pieces of the other and sold each for 1500 Euros. We got the return of our efforts but it is difficult (Designer, female, 30s).

On the institutional side, high costs make it less likely to develop sustainable practices and products. Similarly, one of the designers, who has collections from recycled and organic materials, addressed that it is both very difficult and costly to design collections using ecological, organic, or recycled materials. It requires spending a lot of time, money, and effort. Furthermore, no one wants to support because it is difficult to earn money from it. Consequently, it remains as a small percentage of the business. On the other hand, it becomes appealing if it can be marketed at a high price.

... Sustainability of fast fashion means to be quick and to be affordable. Slow fashion can only be a niche market within fashion. However, this is not my business. I wish it would be but it isn't. It is similar to having an organic license to be able to have three organic orders in a year. I can do organic. I have an organic license. I have a recycle license but I am not earning money from them. Sustainable fashion has its own economy. The firms that give these licenses charge a lot, so it is expensive to get these licenses; it is expensive to manage; and the license needs to be renewed every year. This is another business; another economy. It does not worth it. I only get those licenses for marketing. They only have at most one percent share in my total sales. I do not believe in having everything organic as there are firms that earn money from this as well just like... (Owner, male, 57). (Rest of the quote is used at speed and lack of trust sections.)

Making profits is the main purpose of most companies as they need to make money to sustain their business. Some of the informants believe that sustainable fashion can only be a niche market as it is not possible to earn money from it. It is expensive to obtain special licenses such as license to manufacture organic products. There are companies who earn money from providing these licenses. Furthermore, orders for organic products only make up a small percentage of the total sales. Therefore, having an organic license does not bring any extra profits. Consequently, sustainable fashion products cannot become the main business of companies.

It might sell as corporate and marketing message inevitability that just about everyone is rushing to incorporate into their language in order to rebrand themselves as if they always were, incredibly sustainable. But the majority of young designers, and they are the ones who, in my experience, are more likely to work sustainably, are struggling – and as a result we certainly don't see enough sustainable fashion around, despite a marked increase in demand (Orsola de Castro 2015).

Similarly, ethical fashion designer Orsola de Castro, who makes clothes out of recycled off-cuts of luxury materials, wrote in website "Make the Future Here" for Brooklyn Fashion + Design Accelerator (BF+DA), which is a new initiative launched by Pratt Institute to provide designers with resources they need to transform their ideas into successful businesses. She argues that sustainability hasn't been selling very well and designers are struggling. Consequently, sustainable fashion is not spread beneath becoming a marketing message for the corporations.

Livia Firth, also attracts attention to the high price and cost of garments made of sustainable and recycled fabrics, compared to cheap prices of fast fashion items on the market, as a barrier for sustainable fashion becoming widespread (Bursaligil 2015). Cost efficiency is still as important as environmental responsibility. Therefore, renewable or recyclable materials and environment friendly fibers need to be competitively priced in order for sustainable products to become more affordable. Firth, believes that as people become more aware and conscious, and as demand and number of producers increase, price and cost of sustainable products will decrease to normal levels, helping the movement to gain strength.

Furthermore, there are alternative means of becoming sustainable as well. For instance, mending and repairing items is both sustainable and economic. Retailers can become service providers for mending and repairing. However, the quality of the items also needs to be good so that they will last longer and will be worth repairing. Moreover, the consumers should be willing to spend time and effort to take their used garments to the store to be mended, repaired, or changed. However, the other hand, the present fast fashion products are often so cheap, they neither have quality nor value, so the consumers find it easier just to replacing them with new items.

We got Nike working with us at the moment and we have been working with them for couple of years now. They are known to be a brand that turns over 60 billion dollars a year and sells into practically every market that has any kind of economic power across the entire world. They know that they are now facing the potential of resource scarcity as a major issue. At the moment they have huge profitability; they are growing constantly; they have massive market impact and a market share as a sportswear brand; their footwear is incredibly successful. However, they know that those margins will get squeezed if resources start to become more expensive, which they will and if they are more in demand, which they are going to be. The brands at that level have to think in terms of 10 years, 15 years, 20 years ahead because they are at a size where that is relatively important. They are the ones that go "all right this is really problematic for us because we can't think short term. If we still want to be around in 20 years time, we have to think of what the risks are." That risk analysis brings something that a lot of brands are now engaging in and that will change the picture for them. The fact that fast fashion brands are immensely profitable right now is indicative of the cheap resources that they can get for people and materials, which is not necessarily going to be the case indefinitely (Business and Research manager, male, 40s).

On the other hand, due to resource scarcity, soon brands will not be able to offer cheap prices. Some big brands such as Nike, are aware that they may face resource scarcity in the future. Fast fashion brands have huge profitability at the moment but those margins will get squeezed if resources become more expensive, as there will be less supply and more demand. Therefore, big brands like Nike need to think ahead and be aware that their current profitability is indicative of the cheap

resources that they can get now, which is not going to be the case indefinitely. Consequently, in the future resource scarcity and increase in resource prices can lead to the end of cheap prices in fashion industry.

There isn't an answer to why people are buying one but longer lasting, valuable item rather than 10 throw away unsustainable garments. It is like a conundrum. Whenever I sit in a forum with lots of big manufacturers, retailers, and institutions, whether it is the Textile Institute, or the Sustainable Power Coalition, or the British Sustainable Clothing Action Plan Group, whatever it is that same conversation occurs. That is this ticking point. We can make these changes; we can put these policies in place; we can ask for these guarantees from the people we work with; we can have code of conduct; we can ensure compliance but in the end if we are not willing to shift anything on price and if we are not going to shift anything on time and if we are not willing to ask our consumers to actually to step back and think more about what they are buying, then we get stuck (Business and research manager, male, 40s).

As a result, conflicting perspectives on future of speed and affordability show that, there is no easy way to slow-down production and consumption, or to convince people to buy less number of valuable items. If people do not think about what they buy; and if there are no changes on speed; or the value paid, then the system gets stuck. Policies can be enforced and compliance with standards can be ensured but if companies and people are not willing to shift anything on price, on value, and on time, then it is not possible to make any real changes or progresses in the system. The next section offers remedies to some of these problems and challenges and provides marketing implications of these suggestions.

6.2 Remedies and Marketing Implications

Even though the main purpose of this dissertation is to examine the process of market emergence in the field of fashion, there are many barriers, challenges and conflicting perspectives with regards to emergence of a sustainable fashion market, as addressed in earlier sections. Therefore, before concluding the dissertation with theoretical contributions on market emergence, I discuss previously suggested

remedies and propose some new ones that facilitate mobilization of a sustainable fashion market.

We all know how we got here and while some will blame the corporatization of fashion with its associated need to show ever-increasing quarterly results, and others social media with its constant demand for new content, and others the minute attention span of consumers, and I would say it's really all of the above. The question now is: what do we do? (Rickey May 1, 2014).

At the Copenhagen Fashion Summit in 2014, journalist Vanessa Friedman gave a keynote speech on sustainable fashion. She stated that there is no use in blaming the corporations, media, or the consumers. Instead it is time to discuss what to do next in order to resolve the problem of disposable fashion (Rickey May 1, 2014).

As Tamsin Lejeune, founder and CEO of Ethical Fashion Forum defines "*sustainable fashion represents an approach to the design, sourcing and manufacture of clothing which maximizes benefits to people and communities while minimizing impact on the environment*" (Chandak 2014). Therefore, the different remedies that I discuss in this section are related to all steps of the supply chain, including production, use, and reuse processes and are grouped under the sub-titles: enhancing knowledge, awareness, and consciousness; building collaboration, communication and trust; transparency and traceability throughout the supply chain; enhancing industry standards and regulations; role of labels, indexes and measurement tools; diversification of business models; appealing to institutional logics; and role of consumers.

While most prior studies on sustainability follow an activist approach, criticizing current consumption habits, and trying to build awareness of ethical ways, this study further highlights the ways in which sustainable fashion system can make real progress by shedding light on the driving factors and the barriers in formation of a sustainable fashion market; and by providing an overview of remedies that can facilitate the mobilization of sustainable fashion.

Even though these improvements do not resolve excessive consumption and production habits, each step taken by a different actor makes promises for a more

sustainable fashion system. Therefore, it is important for all the actors, including brands, retailers, producers, designers, scholars, practitioners, public policy makers, governments, and consumers to be aware of these issues and apply sustainability values and principles.

6.2.1 Enhancing Knowledge and Awareness

Enhancing knowledge, awareness, and consciousness is one of the remedies necessary to drive change efforts. Education and training of the actors is influential in enabling interaction; in strengthening the network, and in enhancing knowledge and awareness, which are crucial to mobilize the actors to drive change. McRobbie (1997) argues that talented and trained fashion designers working with small teams of well-paid, well-trained production workers can create consumer and producer sovereignty, providing an honest system that is able to survive global competition. However, competing against the global fast fashion system is not as easy as it is argued, which is demonstrated by the barriers listed previously.

Prior literature suggests that individual consumers rarely connect consumption practices and outcomes (Connolly and Prothero 2003; Hobson 2004). Therefore, education and training activities are critical in building awareness and increasing knowledge of outcomes of consumption practices (Prothero et al. 2011). For instance, Pears (2006) demonstrates that unsustainable behaviors, such as wasteful fashion consumption, can be challenged and a sustainable consumption practice can be developed by raising awareness of fashion waste and encouraging individuals to take action to develop a sustainability movement through encouraging frugality, simplicity, and waste conservation.

Findings also show that consumers are often not aware of the negative consequences of fast fashion and how much the clothes they buy are damaging the environment. Therefore, one solution is to encourage the companies, producers, and the designers to improve their sensitivities during the production process; and to take action to increase public awareness and consciousness.

It is difficult to convince or encourage people to consumer less and buy fewer clothes, especially when the retailers constantly offer new products and change their collections frequently. Instead the starting point can be to educate them on how to make use of the clothes that they do not wear anymore. They may then realize how

much clothes they buy, consume and throw away, which can encourage them to buy less as a second step. There were big boxes in France that people can leave their unused clothes. Something like this can be done in cooperation with the municipalities, which can be useful (Assistant consultant, female, 30s).

Another solution is to educate the people on how to make use of the clothes that they own and do not wear anymore. They may then realize how much clothes they buy, consume, and throw away, which can encourage them to buy less. Consequently, educating people on recycling can encourage them to become more sustainable. Furthermore, increasing consciousness of the production process can help people to become more cautious. Considering the whole design, production, and distribution process and the people involved in making of a garment can help to overcome desire to buy something new all the time.

Moreover, people can be encouraged to consume sustainable products if it is communicated well. For instance, second-hand usage can be encouraged and negative perception on wearing second-hand clothes can be changed, if it is explained well to people. Increased publicity of institutional innovations such as use of renewable or biodegradable fibers and low-energy processing techniques, as well as the promotion of swishing and shwopping events, can all help to increase awareness and enable sustainable fashion to gain strength and acceptability.

Various publications, such as Jordan Phillips's *Sustainable Luxe: A Guide to Feel Good Fashion* and Elizabeth L. Cline's *Overdressed: The Shockingly High Cost of Cheap Fashion*, also help to raise awareness on consequences of fast fashion. They promote the use of healthier, natural, and eco-friendly products; encourage buying less of higher quality products and valuing meaning and longevity; promote preserving traditional crafts; and address issues such as recycling, fair trade, and water wastage (Kissa 2015). Another example among many is the cult fashion magazine i-D, which gives Centre for Sustainable Fashion a larger platform to help shape the new fashion dialogue.

Special projects also help to increase awareness on sustainability. For instance, i-Sustain was initiated in 2011 by Alex McIntosh from CSF in collaboration with i-D magazine. The project aims to create a network and support fashion designers, SMEs, and creative small businesses; explore and communicate the

diverse ways in which sustainability can manifest itself in business and behavior; and challenge the conventional aesthetics associated with fashion and sustainability.

The improvements and steps taken are important but they are not really tackling the root cause of the problems, which is using too many resources. Therefore, it is important to raise awareness of both companies and consumers on resource scarcity. Companies need to produce less number of higher quality products that will last longer and show the customers the real benefits of their products to increase their awareness on these issues and to decrease the use of resources.

Consequently, along with consumers, it is important to increase awareness of the institutional actors, including designers and students, to foster sustainable actions through education programs. Sustainable designer Melissa Joy Manning, states that a lot of designers are not even aware of fashion industry's negative impact on the environment. Therefore, Council of Fashion Designers of America (CFDA) and their Sustainability Committee have started to question the future of sustainable design and started a process of cumulative change. Manning states that with education and collaboration it is possible to inspire both young designers and consumers to be thoughtful of what they buy (Matus 2014).

Institutions such as schools, colleges, committees, education centers, and councils have an important role in increasing awareness and knowledge of people. Considering the environmental impacts of fashion is one of the biggest issues affecting the industry in the 21st century. However, designers often have to work within the constraints of the economic system and students worry about getting jobs after graduating. Therefore, their work needs to be relevant to the industry. Consequently, they barely have an opportunity to consider sustainability issues.

On the other hand, the fashion industry has to face the sustainability issues due to diminishing resources, increasing pressures and criticisms, or rising consumer consciousness. Therefore, it is important for all the actors working in the industry, including the new fashion graduates, to be aware of these issues and apply the sustainability values and principles to their work (M. Lee 2011).

REC Turkey, for instance, in partnership with Bilkent and Bogazici Universities has a Corporate Sustainability Certificate Program. Sustainable Development Academy has been carrying out similar programs in Europe since

2004. The program has been conducted in Turkey since 2007, aiming to educate companies and workers on sustainability to increase their contributions and actions and to enable companies to add a sustainability vision to their corporate strategies (Sustainable Development Academy, n.d.; The Corporate Sustainability Certificate Program, n.d.).

Another initiative is the Eco Fashion Week (EFW) Seminars which aim to provide information on some of the social and environmental problems and challenges the garment industry is facing. The goal of the seminars is to provide information and learning opportunities, and create a forum for discussion around sustainable fashion practices, to find solutions, and to increase the level of sustainability in the fashion industry.

Apart from increasing awareness and knowledge, conferences and seminars also warn the companies of dangers to come and offer solutions to current and awaiting problems. For instance, in the seminar on Integrated Reporting, given by Prof. Dr. Marvin King, in Istanbul, it was addressed that none of the current strategies and programs will work in the future. Therefore, companies and institutions need to come up with new solutions. CEOs and CFOs of big companies discussed the reporting system based on transparency and issues related to sustainability. It was stressed that sustainability will be inevitable in the near future. Therefore, both companies and individuals have to start acting now to succeed in the future (Freelance designer, female, 32).

In addition to seminars, conferences, and education programs, there are other actions to increase awareness. Awards, such as GLASA can become important tools to increase both awareness and encouragement, as mentioned in the examples section. Another interesting example is the experiment carried out as part of Fashion Revolution Day in Berlin. A vending machine offering 2 Euro t-shirts was set in the center of Berlin's main shopping district. However, after depositing 2 Euros the t-shirt was not dispensed. Instead, the machine showed images of sweatshops around the world, featuring the women and children who made those t-shirts. Facts about women's working conditions, such as overworked 16 hour days or unlivable wages of 13 cents an hour were shown along with striking imagery. The shoppers were then asked if they still want the t-shirt or instead donate the 2 Euros to a charity that helps

these women. Nine out of ten shoppers chose to donate their 2 Euros (Zimmer 2015). This vending machine helps to increase awareness of the public but the example also reveals that if consumers are provided with the facts and if the system is more transparent, then people are likely to make more ethical choices.

Films and documentaries also help to raise consciousness. "Cotton Road" is a documentary about how our clothes are made, exploring the global cotton supply chain and tracing the transnational journey of the fabric from fields in South Carolina to the factories in China. The film highlights and raises awareness on the environmental and ethical impacts of fashion industry. "The Next Black" released on 21st of May 2014, is another documentary on future of clothing, which investigates whether innovative fabrics and new technology will transform the way we produce and wear clothing in the future.

Along with institutions and designers, brands are taking action to increase awareness and knowledge of both the consumers and the producers. For instance, Levi's has launched an educational initiative to help consumers understand their environmental impact. To find out their water and energy use, the company asks the customers to take the on line quiz "Are You Ready to Come Clean?" Levi's is also working with the Better Cotton Initiative to train farmers to grow cotton using less water. Their water stewardship actions to date have saved 1 billion liters of water. Chip Bergh, Levi Strauss's CEO and president believes that by engaging and educating consumers, they can change the environmental impact of apparel and, ideally, how consumers think about the clothes they wear every day (Chua March 18, 2015).

Some of the informants also underlined the importance of sharing knowledge and taking joint action. Dream project of one of the informants provides inspiring remedies for the future of fashion industry. Her project includes showing children creative solutions with reclaimed materials; making connections with the elderly to reach ancestral knowledge; becoming a bridge to ensure the survival of local knowledge; creating a platform for the participants to share ideas and skills; and increasing environmental awareness through participatory creative activities. These suggestions all underline the importance of education, knowledge, sharing, and collaboration. It is important for institutional actors who have knowledge on

sustainable practices to come up with projects and share this knowledge to enhance awareness and consciousness.

6.2.2 Building Collaboration, Communication, Trust and Support

Findings signify the importance of collaboration between different actors and interconnectivity in enabling sustainable fashion movement to mobilize. These findings are similar to earlier discussions of McRobbie (1997) and Cataldi, Dickson, and Grover (2010). Communication and interaction between actors is critical in emergence and mobilization of new markets. By engaging in communicative action (Habermas 1984), actors challenge the practices of mainstream marketers. Similarly, in case of sustainable fashion, contexts such as online forums and swishing events enable communicative action and interconnectivity among actors that can mobilize them to seek market changes they desire.

Furthermore, sustainable fashion designers, brands, and companies at the moment have less legitimacy than their fast fashion competitors. Market change dynamics is more likely to occur when supporters of sustainable fashion practices cooperate, which enables them to become more legitimate in the fashion market. Through alliances with powerful institutional actors, such as big fashion retailers or institutions, less powerful designers, producers, and brands can increase their legitimacy and decrease the impact of their limited resources. Sustainable Apparel Coalition, which consists of big retailers, apparel manufacturers, NGOs, and government agencies, is a perfect example of the cooperation and alliance between different actors.

Sustainable fashion covers many aspects including protecting workers, society, and environment. Furthermore, it is not easy to break the fast fashion cycle considering the opportunities offered to shoppers to pay in installments, buy on credit, and all the affordable products offered by chain stores to be on trend. Therefore, sustainability practices are not easy to accomplish alone. The steps taken by brands, institutions, and governments are very important and it is crucial for the actors to come together and to unite.

... What happens at the moment is that brands get a message from the consumer but they want to maintain their own profitability. Therefore, they tell the manufacturer to do things differently and the manufacturers are left with the entire burden. Actually

that dynamic has to shift. As the manufacturers have the technology, the knowhow, and the ability to change, they need to refuse to work like this. They have to tell the retailers that "this is the way we work; these are the things we do; these are the processes we instigate to make sure that our factory is best practice; and these are the implied costs; and we have to share them" (Business and research manager, male, 40s). (The beginning of the quote is related to diversity of business models.)

Brands often want the manufacturers to incur all the costs if something needs to be improved with regards to sustainability. One of the actors to bear all the extra responsibilities, risks, and the costs of becoming sustainable is both unfair and unfeasible. Therefore, shared responsibility and cooperation between actors is critical along with sharing the costs of improving the system, for sustainability actions to become realizable. The relationship between the retailers and the suppliers needs to be more transparent, honest, and fair on both parties in order for the system to improve.

Along with cooperation between retailers, brands, and manufacturers, collaboration with institutions, universities, and government is also crucial. Similarly, Denmark's minister of the environment, Kirsten Brosbøl, addresses that it is not an easy and a quick change; and it is not possible to do it alone. Therefore, industry, civil society, and political actors should work together and change together (Chua April 28, 2015).

It is critical to have sustainable fashion brands and products that are more affordable and that can cater to a bigger segment. However, institutional actors, especially small designers and brands, often lack resources that prevent them from reinforcing logic of sustainability. Most designers and companies are not willing to participate in sustainability projects as it is not an easy process, for instance to transform recycled things; the production process is difficult; and it is not easy to find a producer. Therefore, it is very difficult for them to support sustainability projects alone, without funding and incentives.

In this regard, government and powerful institutional actors play a critical role by providing support and incentives. Especially in developed countries government provides funding to sustainable fashion practices. For instance, European Union often supports sustainability projects (EU Environmental Fund,

Regional Environmental Fund). In Turkey, the government provides incentives for textile companies that establish factories in Eastern regions, to help those regions to develop and to make use of the local labor force. There are also some incentives for export and design projects. However, there is hardly any support on sustainability projects. Therefore, it is important for big companies and powerful institutions to cooperate.

On the other hand there are some developments. For instance, with support of Fashion Designers Association (Moda Tasarımcıları Derneği MTD) and Ministry of Development (T.C Kalkınma Bakanlığı), Istanbul Development Agency (Kalkınma Ajansı ISTKA) established "TURKISH FASHION-ID" Project. The project aims to support Turkish designers and consists of education programs. These projects can also support designers to help them to cooperate and to develop sustainable fashion initiatives.

It's not like they're going to disappear anytime soon, so why scream at them? Let's hear what they have to say (Laroche, EFW founder and President, from an article by Rowland 2014).

While some might argue that the multinational fast-fashion chains are the opposite of everything sustainable fashion stands for, it is important to involve the big retailers in sustainability efforts as well. To hear their arguments and perspectives, Eco Fashion Week founder and President Myriam Laroche has invited H&M's senior sustainability specialist, Pierre Börjesson, to give a keynote speech at Vancouver's Eco Fashion Week (Rowland 2014).

According to Labor Behind the Label, M&S is among the highest ranking companies taking action on implementing living wages. M&S's Ethical Model Factory program show that treating and paying the garment workers well, has dropped worker absenteeism and staff turnover and increased productivity, leading to a rise in salaries. What lies behind M&S's success is working together with, educating, and supporting its suppliers, sub-contractors, and workers. M&S builds long-term relationships with its suppliers, which are closely monitored and supported by its local teams (Abnett 2015). M&S's ethical system of garment manufacturing based on collaboration with its suppliers can become an example to other retailers.

Cooperation with celebrities can help to strengthen the sustainable fashion movement as well. According to Bourdieu (1989), actors who have large number of followers can accumulate symbolic capital that can increase their potential to influence market changes within the organizational field. These actors with symbolic capital are often approached by more powerful market actors who are interested in capitalizing on their influence (Scaraboto and Fischer 2013). For instance, involving celebrity models such as Kate Moss in sustainable fashion practices will help to legitimize and strengthen sustainable fashion by enabling it to become more acceptable both by consumers and by retailers.

Moreover, collaboration and shared social practices help to foster trust (Martin and Schouten 2014). Some of the informants address that communication and collaboration is important to resolve the conflicts and enhance trust between actors. However, there is still lack of trust that retailers will not keep their promises on building long lasting relationships with their suppliers. Economic greed and priorities of the retailers dominate over having true partnerships. Developing a long lasting relationship based on mutual trust requires retailers to accept that suppliers and workers need to earn some money as well. Consequently, for fashion system to become sustainable, there needs to be real partnerships based on mutual trust between retailers and manufacturers (Owner, male, 57).

The apparel and textile industry is all of us. We are all in the same family. We are all part of the damage that the textile industry is creating. We all need to get together to share information (Hyslop 2014).

As a result, considering the consequences of the fast fashion system and potential future problems the society and the environment face, it is a topic that we all need to act on together as consumers, producers, designers, institutions, and schools. All the institutional actors have to acknowledge that they make up the fast fashion system and are responsible for the damages it causes. Therefore, it is important for them to collaborate and act together in order to change and improve the system.

There will always be conflicts between economic, social, or environmental goals and it is not possible for any actor alone, including consumers to make a

difference. Therefore, everyone should contribute to make a change in the marketplace. In this regard, increasing communication and collaboration among actors; building mutual trust; and sharing the costs, benefits, and responsibilities are important for the actors to act together in order to facilitate the formation and mobilization of a sustainable fashion system.

6.2.3 Transparency and Traceability of the Supply Chain

Supply chain transparency and traceability enable consumers to become aware of the way their clothes are made and the people who make them, which encourage them to make sustainable choices. Director of the film "Cotton Road," Laura Kissel, underlines that supply-chain transparency can even lead to social change as consumer choices can become important initiators and supporters of change (Chua January 5, 2015). Supply chain transparency is part of the business plan for sustainable and slow fashion brands as it enables the actors, including the designer, maker, and user of the clothes, to have a closer interaction and a transparent relationship, which is critical for the mobilization of the market.

Rapanui, an Award-Winning Eco-fashion brand from the Isle of Wight, is one of the companies which managed to establish a transparent system. The company makes products from organic or recycled materials in an ethically accredited, wind powered factory with low waste printing technology. Their aim is to make it easier for people to find out where clothing comes from, how it is made, and who made it. To this end, Rapanui created the traceability maps to allow customers to trace the source of the product. They are among the first to trace the product supply chain down to the planting of the seed, the fabrics, manufacturing, energy use and transport, as well as considering eco labeling and post purchase impact. Traceability map allows shoppers to see the story behind their clothes and are available for every product the company makes. They argue that once consumers are given freely accessible and detailed information about where the clothing comes from, and how it is made, they will be able to make a more informed choice, and tend to shop more sustainably (Rapanui, n.d.).

Swedish denim label Nudie Jeans is another brand that is working to make their supply chain transparent. The CEO of the company, Palle Stenberg states that Nudie has become 100 percent organic and their next step is to be 100 percent

transparent, to show people everything. Stenberg addresses that the brand has become popular but not everyone buys them for the ethics. He wants the consumers to become aware of the ethical side of the business as well. They want to be a fully transparent company to encourage the public towards responsible consumerism (Borromeo 2014).

It is critical for big fast fashion retailers and chains to become transparent as well. I have mentioned previously that since the late 1980s, western fashion brands have moved their production first to China then to poorer countries, such as Cambodia and Bangladesh, in search of factories that could offer the lowest costs. They might have created new jobs in these markets but with unethical working conditions, which was unknown to consumers until the recent tragedies, due to lack of transparent supply chains.

On the other hand, there are some exceptions, which show that it is possible for big retailers to become transparent. For instance, Marks & Spencer's third-party suppliers are largely based in the developing world but its supply chain is ethically sound and transparent. They have close relations and contact with the factories they work with. In 2014, Ethical Consumer magazine named Marks & Spencer the most ethical high street fashion retailer. However, it was one of only four clothing companies included in Ethisphere's 2015 Most Ethical Companies list (Abnett 2015). Therefore, more big retailers need to make some effort to become more transparent.

There are other institutional actors who argue that making the production chain transparent is critical for sustainability. For instance, Elizabeth Laskar, an ethical fashion consultant, believes that traceability systems and tools can benefit the whole fashion industry. Therefore, having a transparent system may even become a legal requirement over time (Styles 2015).

Similarly, according to Kate Fletcher (2013), pursuit of transparent and traceable garment supply chains is no longer idealistic; instead it has almost become a pre-requisite of being in business. She argues that it is not possible to improve the efficiency of operations without knowing that the supplier factories have safe building structures and they guarantee that workers are fairly paid. It is now possible to trace and manage this information thanks to new web-based track and trace technologies and databases. Some brands such as Bruno Peters' Honest By and

Rapanui, share this data publicly and in detail. Consequently, people are now becoming more informed and a little more connected with the manufacture and distribution of their clothes (Fletcher 2013).

This connection between the clothes we wear and the makers of the clothes was common centuries ago, as our ancestors would have known the history and origin of the few things they owned as well as the people who made them. Fletcher (2013) states that we lost this connection when supply chains have scaled up and become global. Now sustainable companies are trying to build back this connection with generated data in order to make their systems more transparent.

Another way to regain this connection is to support a local approach, which also helps to make the supply chain more traceable. For some of the informants, ideal is scale of things to be reduced and things becoming much more localized. There are changes in lifestyles and people are now becoming interested in owning things that feel a bit more real or a bit more connected rather than something that is throw-away and that lacks meaning. This cultural shift isn't happening fast but it has started to influence especially the more developed cultures such as UK, USA and some parts of Europe (Business and research manager, male, 40s).

Orsola De Castro invites consumers to demand transparency and traceability throughout the fashion supply chain as well. In 2013, she co-founded Fashion Revolution, a global coalition of academics, designers, and organizations which demand increased transparency in the fashion value chain (de Castro 2015). She states that as consumers become increasingly aware of the process, there will be revival of the artisan and innovation for sustainable solutions. As a result, along with the steps some retailers, brands, and suppliers are taking to improve supply chain transparency, the consumers can also challenge the companies to become more transparent and traceable, which is necessary for the system to become sustainable.

6.2.4 Enhancing Industry Standards and Regulations

Some of the barriers to sustainable consumption and production stem from lack of policy and standards (Thøgersen 2005; Prothero et al. 2011). Regulating how the goods are made is important for the fashion industry to become sustainable. However, the industry lacks widely accepted compliance standards. According to the Ethical Fashion Forum, ethical labeling initiatives like "Fairtrade" only cover the

cotton production process. There is no global standard covering the entire fashion supply chain. To prevent new tragedies, fashion industry should be subject to inspections and regulations and there should be serious penalties for companies who fail to fulfill the requirements (*Business of Fashion*, August 19, 2014).

Giesler and Veresiu (2014) also address that it is not possible to solve political and environmental problems by switching consumers to more sustainable lifestyles because corporations create new markets to serve these responsible or green consumers. Therefore, it is not enough to teach people to be more responsible and sustainable because this results in reinforcing market structures, which are actually responsible for problems like global warming. Consequently, governments should implement policy changes and regulations to solve environmental and social problems and to regulate markets. Otherwise, responsible consumption benefits corporations more than society by enabling the creation of new markets and leave consumers with the responsibility to solve the problems (Giesler and Veresiu 2014).

Having a quality assurance standard similar to the ISO 9000, can help to ensure that the fashion brands manufacture their products in a responsible way. Furthermore, companies often have incentives to comply with such standards, as certified companies generally have superior returns on assets. Standards can also benefit the fashion industry by allowing companies to use third party services to ensure that they are run correctly and safely. However, implementing such standards require huge investments (*Business of Fashion*, August 19, 2014). Therefore, it is important for all the actors to share these compliance costs.

One of the key gaps in the system is the absence of global governance, as regulations vary from nation-to-nation, resulting in a lack of standardized benchmark to measure the impact of ethical fashion initiatives. There are efforts to fill this gap such as having independent auditors, building databases for best practices, conducting research, and developing financial reporting standards that measure a triple bottom line of financial, environmental, and social impact. For instance, both Nike and Puma release triple-bottom line accounting reports to present their ethical impact every year (Chandak 2014).

On the other hand, it is not easy to monitor all the suppliers. The co-founder of sustainably-sourced brand Zady, Maxine Bedat, states that some factories present

themselves as ethical and law-abiding during client visits, but in reality they fail to uphold fair labor guidelines. Therefore, Zady prefers to work with suppliers from the United States or Europe, where it's easier to control the suppliers. Furthermore, the company does not source from countries that have failed to enforce fair labor standards (Chhabra 2014).

One of the retailers which have established an ethical system of garment manufacturing is M&S. It is one of the first companies to publish global sourcing principles in 1999. It outlined standards on ethical issues such as working hours, wages, and safety. In 2007, the retailer launched "Plan A," which now includes over 180 commitments on social and environmental issues and reports its progress every year. Under the plan, M&S trained half a million workers on employment rights, healthcare, and financial literacy since 2010 and assesses every supplier factory independently. In 2014, 75,000 workers in 40 factories participated in this scheme (Abnett 2015). Big retailers like M&S having regulations and standards, further help to educate the suppliers to become more cautious of the environment, society, and workers.

Furthermore, implementing standards and regulations also benefit the companies and its shareholders. Director of M&S's Plan A, Mike Barry, argues that apart from being an effective sustainable business plan, Plan A also delivers values for shareholders. Plan A was predicted to cost the company £200 million over five years but M&S reported that, by 2013 the plan had saved the company £320 million. In 2014, it delivered a net benefit of £145 million. This shows that performing well on ethical standards is also associated with having better quality, fewer returns, and less rejects and complaints from customers. Therefore, when M&S grades the performance of its suppliers, it gives equal importance to sustainability along with commercial and technical improvements (Abnett 2015).

Meeting notes also address the importance of standards and sanctions in enforcing companies to take action. Governments and regulatory institutions can make it mandatory and have sanctions to enforce companies to recycle and decrease textile waste. Kirsten Brosbøl, Denmark's minister of environment, underlined that mitigating environmental pollution through a common supply-chain standard, while

pressuring the EU to enhance chemical regulations should become an important part of the sustainability plan (Chua April 28, 2015).

Furthermore, it is important for the retailers to come together to oppose unfair competition and protest retailers that offer cheap prices without following any standards or ethical rules. They need to set certain rules and standards together and ensure that all the retailers and suppliers have production complying with these widely accepted standards. This joint pressure will enable the fashion system to improve slowly because once all the retailers and producers comply with these standards they will not be able to sell cheap products that are hazardous to the environment and the society.

As a result, using third parties to manufacture goods is a common practice in fashion, but brands and retailers are still responsible for properly investigating and monitoring their third party contractors. The Rana Plaza Accident reveals the fashion industry's inability to hold brands accountable for their actions and shows that the industry's requirement for legislation, sanctions, and enforcements. Furthermore, considering that the environmental crisis is not far away due to diminishing resources, sustainability needs to become mandatory. In this regard, influential actors such as governments, big brands, associations, and unions must all play their part in enforcing industry-wide sustainability standards, legislations, and sanctions to improve the conditions of garment industry and ensure that the factories, suppliers, retailers, and brands, all comply with these standards.

6.2.5 Role of Labels, Indexes, and Measurement Tools

In theory, eco labels can provide environmental and social information about a product and they can encourage environmental goals by shaping purchasing choices. Prior literature states that eco-labels help to cultivate a bigger market for sustainable fashion (Chua April 28, 2015). Harmonizing global garment and textile labeling initiatives under a sustainable fashion label can help the formation of a community of practice and strengthen the network (Cataldi et al. 2010).

On the other hand, opinions on the effectiveness of labels have been mixed. Some of the informants are supportive of using labels in promoting sustainable fashion, as they help to increase familiarity and awareness. Others are more cynical on their effectiveness. Even if they may be used as a marketing tool and considered

as green washing, people still need something visual to associate with and to understand how a garment is made.

The results can be measured. For instance, how much the profitability will increase if water usage during production is decreased; or how much the decrease in a certain material brings additional cost advantages; what is the return and economic profitability of decrease in certain materials as a result of research and development and innovation projects? If the benefits are presented like this than the owners and managers of companies may become more interested (Consultant, female, 30s).

The industry needs to be interested in measuring the results. They need to be making cost-benefit analysis and measure costs and returns of producing green products. If the water usage during production decreases this can mean reductions in costs and increase in profitability (Consultant, male, 30s).

Apart from using labels, measurement tools also have an important role in increasing awareness and in bringing an industry-wide sustainability standard. The industry needs to be interested in measuring the results and benefits of sustainable actions. Presenting the results of research and development and innovation projects; and showing the increase in profitability, return on investments, and additional cost advantages can attract the attention of owners and managers of companies and encourage them to support sustainable practices.

The Higg 2.0 Index, which was released in July 2012 by the Sustainable Apparel Coalition (SAC), is an important step in this regard. It is a sustainability measurement tool that allows apparel companies to measure the impacts of their products across the value chain (Mazzoni 2014). Furthermore, measures such as Natural Capital Accounting can become an external communications tool for the companies (Richens 2014). When Kering and its brand PUMA developed and published the first Environmental Profit and Loss account in 2011, they inspired the apparel companies to pay attention to natural capital valuation (*Textiles Update*, April 25, 2014).

Consequently, apart from increasing awareness of negative consequences of the current fashion system, it is also necessary to communicate the benefits of sustainable fashion system both to consumers and to brands and producers. In this

regard, publicizing institutional innovations; using labels and measurement tools; making cost-benefit analysis; and measuring the return of producing sustainable products, can be influential in increasing awareness of benefits and to cultivate a bigger market for sustainable fashion.

6.2.6 Appealing to Institutional Logics

Some of the strategies Scaraboto and Fischer (2013) identify for mobilization of marginalized consumers can be effective for enhancing strength and acceptance of the sustainable fashion market. In previous sections on increasing awareness and collaboration, I discussed publicizing institutional innovations and allying with powerful institutional actors. In this section, I address the importance of appealing to institutional logics.

As stated in literature review, institutional logics of commerce and art are prevalent in the field of fashion. For practices on sustainable fashion to become successful, institutional actors need to expand practices that are consistent with these logics. However, apart from working in line with logic of art and logic of commerce, institutional actors also need to find new ways of working in line with "logic of sustainability," which requires caring for the wellbeing of workers, communities, and ecosystems. Consequently, for practices on sustainable fashion to become successful, they need to appeal to all three logics of art, commerce, and sustainability.

Fashion always had aesthetic considerations (Baudrillard 1969; Wilson 1985). In the findings chapter, I stated that aesthetics can become a solution to homogenization of design and artificial newness, which have become a problem with rise of disposable fashion. However, aesthetics have not been successfully employed so far in promoting sustainable fashion, as sustainable and ecological designs are mostly found dull and ugly. It is important for sustainable products to have an aesthetic appeal to be desired by consumers. By creating sustainable fashion garments that conform to industry's aesthetic ideals, fashion retailers can appeal to more consumers.

Furthermore, sustainable fashion garments also need to appeal to logic of commerce because it is important for retailers, brands, designers, and suppliers to earn money to be able sustain their business. If firms anticipate the longer term

benefits of sustainability and its effects on profits then they are more likely to integrate sustainability into their business models.

However, it is not easy to provide consumers with ethical, aesthetically beautiful, and at the same time affordable products. Gonzales (January 5, 2015) questions if it is possible for big fast fashion brands like H&M to diffuse the sustainable fashion movement to the masses by offering accessibly-priced, ethically-made garments. There are examples that show it is possible for ecology and economics to work together by making use of technology and design, as addressed in the examples section. Technological advancements enable to adopt consciousness at the earlier stages so that the whole production process can be in line with the standards. Similarly, some brands such as Nudie Jeans do not foresee a trade-off between profit and people, or between manufacture and environmental responsibility (Borromeo 2014).

On the other hand, commerce and sustainability logics often contradict. It is difficult for something to become fashion without becoming popular and for something to become popular it needs to be affordable so that it is accessible by masses, which is in some way paradoxical. Furthermore, as stated previously, there are firms that use sustainability for commercial reasons, to increase their sales. Others anticipate it as a popular trend and want to become the pioneer to gain advantage. Consequently, commercial aims often outrun sustainability benefits.

Even though brands, producers, and consumers with economic concerns, supporting only logic of commerce, can argue that reducing consumption would create a social and economic catastrophe, resulting in loss of jobs and poverty. Furthermore, it is difficult to have a business model that opposes the global capitalist system as it is not easy to stop businesses from being profit-oriented. However, for businesses to be sustainable it is not enough to be only concerned with economic and commercial aspects, as sustainability also has environmental and social dimensions.

As a result, for sustainable fashion practices to be successful there needs to be a balance between all three logics of art, commerce and sustainability. In order for aesthetics not to become a barrier in mobilization of sustainable fashion, sustainable products need to appeal to logic of art and be aesthetically beautiful without compromising on ethics. However, it is not possible to ignore the economic aspect.

Therefore, the actions taken and investments carried out to become sustainable need to be balanced and consider economic and commercial viability. Consequently, the institutional actors need to start finding new ways of working in line with the three logics, which I discuss in the next section on diversification of business models.

6.2.7 Diversification of Business Models

It is time for both the companies and the consumers to take action and start doing things differently. However, as addressed in the previous section, appealing to all three logics of the system by providing products that respect the environment, workers, and society, and at the same time fulfill the aesthetic and commercial requirements, is not easy. In this regard, diversification of business models in terms of using different methods and resources appears to be the best remedy.

As stressed previously, sustainable fashion is not only related to production; it includes practices related to all steps of the supply chain. Therefore, different models can be related to design, production, use, or reuse processes. The different business models included in this section are related to all these processes and incorporate actions of different institutional actors such as designers, brands, retailers, and institutions.

I hope that we are going to see a diversification of business models. I hope people and businesses will start to realize that unless they do they are going to get really stuck, so they will start thinking about how they can diversify in terms of manufacturing and production methods; and how they can diversify in terms of fibers. It is time to understand how they can take action instead of just talking and that involves reaching to the consumer and saying "do it differently; think differently." It does not matter when something is new. It matters when it is something we like...I don't know if we can go backwards. It is tricky to say. Perhaps we could still have that speed but only in certain things. Maybe we will find selections that allow us to be able to have completely reprocessed garments that allow for fast turnover whereas other things are real investments. If in our heads we can segregate in the way that it makes sense then as businesses we could start to relook at it. However, what they do at the moment is the model where the more investment stuff is just there as loss leaders and they channel more of the middle of the product range as best sellers. Merchandisers and sales people go "right we are going to market heavily these 25 pound t-shirts that are really the thing. We are

going to sell 10million units of it across the world this season and we are going to be marketing this thing as the aspirational thing and those are the things that we will be walking into the store and see first." That model has to change. Either that fast bit has to find a better resource dependency and be able to come up with a way that all of that is reprocessed or all of that is biodegradable or all of that makes best use of the resource that is immanently renewable which is not cotton, that is for sure! But we are nowhere near that (Business and research manager, male, 40s).

The current fast fashion model only markets the fast turnover products as aspirational products, which become the best sellers. This model has to change for the system to become sustainable. Some products offered in the market can have fast turnover, as it may not be possible to completely go back to the old system. However, other products, hopefully the majority, should be real investments that people keep and use for a longer period. Furthermore, the fast turnover products should be produced in a sustainable and responsible way, using biodegradable and renewable resources. However, the current system is too far away from this model.

To succeed, global apparel brands will need to reinvent their business models. One of the solutions is supporting a zero waste philosophy, which can be integrated at the design phase. Clothes can be designed and patterns can be made so that there is zero waste in production. However, notes from meetings and conferences suggest that this can be hard to achieve globally. Therefore, companies also have to find other sustainable ways to integrate unused fabrics, production wastes, and scraps into their production lines.

In this regard, reuse of sustainable fibers, help to promote sustainability in clothing production. Products that can no longer be used in their present form are broken down and rewoven into "new" fiber. The reusable fibers can be blended with complementary fibers to make new products and to give the products more strength and resilience. Cotton is not the only fabric that is recycled today. The increasing use of polyester made from PET bottles as a fabric adds resilience to cotton textiles and reduces the waste going to the landfills. The list of reusable fibers is expanding as well, increasing the opportunity for new textiles and the durability of products. These new fibers like Tencel (eucalyptus wood pulp), reduce environmental costs of creating ecologically sustainable apparel (J. Lee 2014). Furthermore, increasing the

durability of products is important because according to WRAP's research, extending the active use of clothes by just three months per item would lead to a 5 to 10 percent reduction in carbon, water, and waste footprints (Godelnik 2014).

On the other hand, according to the Environmental Protection Agency, only about 15 percent of the 13 million tons of clothing and other textiles that are thrown away each year are recycled, turned into products, or broken down to be reused as sustainable fibers. However, there are positive developments and producers and consumers have started to consider the result of discarding used clothing (Mazzoni 2014). There are now organizations like Secondary Materials and Recycled Textiles (SMART), agencies like the Environmental Protection Agency (EPA), and sustainably directed companies, which promote recycling and upcycling to decrease environmental impacts of fashion.

Goals to decrease water waste and future carbon emissions are important steps but there are still huge quantities of unwanted clothes that exist. Upcycling helps to make use of these unwanted, second-hand clothes. It adds value and a new use to disregarded and thrown objects and can be used to help bring back the mending culture. For instance, tons of foreign-donated second-hand clothing is shipped annually to Haiti. Canadian social enterprise Local Buttons works with skilled Haitian tailors and artisans to create sustainable and ethical clothes from second-hand materials. Local Buttons shows how upcycling can be used at an international level and can be integrated with local and traditional manufacturing (Walker 2014).

One of the fast fashion retailers that support upcycling is Topshop with its "Reclaim to Wear" up-cycled collection created from waste fabric. The collection has been growing in terms of scale and worldwide availability due to its success. This can be an indication of increase in interest for upcycled fashion and it also shows the importance of commercial and economic aspect of sustainable collections. However, some still do not trust the real intention behind these collections. Reclaim to Wear's "upcycled" clothing isn't from clothes going to landfills. It is from production scraps of other collections, which means that Reclaim to Wear isn't decreasing the production of "new" clothing (Ettinger 2014). However, it still helps to make use of production scraps.

There are a lot of different, small business models as well, such as David Hire who set up Howies and Higher Denim; and Christopher Raeburn who upcycles thrown military materials. These small companies and actions are important in creating awareness and increasing visibility of sustainable fashion but it is also necessary to apply these in bigger scale. Furthermore, there are companies that invest in technological developments to have a more sustainable fashion system such as Teijin which developed the recycled polyester and close loop process and Lensing which developed the close loop cellulosic fiber process. However, people are either not aware of these developments or they do not understand what they mean and serve.

Catalytic Clothing, for example, is a project exploring how clothing can be used to purify the surrounding air. Designer Helen Storey and chemist Tony Ryan have created this collaboration, using elements of art and science together. The project uses nano technology in textiles to create an ambient environment around the wearer. If everyone wore this form of clothing it would reduce pollution by 80 percent, which means people would be collectively making a difference to their environment. However, such projects are again small in scale and are unlikely to be used by mass public. On the other hand, they still show that it is possible to use science and technology together with art to make sustainable and beautiful products.

Furthermore, some of the technological developments to improve durability and performance of fabrics can pose hazards to human and environmental health. It involves health concerns for users of treated textiles, for workers in textile finishing plants, and for the communities surrounding the plants. Adding chemical finishes to textiles can also negatively affect post-use. For instance, natural fabrics like cotton or wool are not able to biodegrade safely if treated with chemicals. One solution is biomimicry, which involves the application of nature's designs to man-made products. Another option is to use existing fibers that have both performance and sustainable attributes, such as wool (Hoguet 2014).

The scale of the business is important but it is also important to look at different solutions for different parts of the industry. The actions a big manufacturer needs to undertake are very different then the initiatives of a small scale producer. It is critical to consider the sum of all these processes and process-driven actions,

including the dyeing and finishing, the wet processing, and the wastage in the factory because sustainability includes all these issues.

Similarly, some fashion companies argue that there is not one single way to be sustainable. There are alternative ways to improve practices and create a more sustainable business model. These can include ensuring a fair living wage and better working conditions for garment workers or creating a closed-loop system, where customers are encouraged to bring back unwanted clothes, which will be used as textile materials in new products. However some of these solutions, such as creating closed-loop systems, require consumers' collaboration and further technological advancements. Michael Braungart and William McDonough state in "*Cradle to Cradle: Remaking the Way We Make Things*" that some of these solutions, like the closed-loop system, focus on "*being less bad, or making the old, destructive system a bit less so and doing less bad is not the same as doing more good*" (Godelnik 2014).

Consequently, some argue that the fast fashion industry requires a mindset shift from being based on selling a large number of low-quality products to selling less yet better products. Godelnik (2014) refers to this as a mindset shift from being wasteful to being mindful. However, this is not an easy process. As Oliver Balch wrote in *The Guardian* in 2013, it requires a shift from "*creating happy shoppers to creating happy non-shoppers,*" who use their garments for longer, share their clothes, and buy less.

Fashion designer Vivienne Westwood also believes that we can only solve the problem of environment when we dismantle capitalism. Clothes should cost more than they do and we need clothes but we do not need so much. Therefore she suggests in a speech she gave on capitalism and clothing to "*buy less, choose well, make it last*" (*The Guardian*, October 29, 2014).

It is crucial to convince the consumers that they do not need a lot of clothes and they can make use of the ones they already have. Therefore, sustainability efforts also include showing and teaching consumers how to reuse and restyle what they own (Donatelli 2014). Fashion consumers are already learning to mix and match, investing in good basics, vintage fashion and jewelry, which can be worn with more than one outfit, in order to become more responsible shoppers (Kissa 2015).

Consequently, shifting the market toward greater recycling and reuse is an essential step.

In this regard, global apparel brands can support the circular economy, and invite consumers to join their efforts not only in recycling but also in using the clothes. Almost two-thirds of a garment's total environmental impact occurs in the consumer use phase, which is during washing and drying. Therefore, it is important for fashion brands to engage the consumers in sustainability efforts as well (Gonzalez February 19, 2015).

According to one of the informants the individual brand approach can be stronger than using labels because it is connected to what the company does rather than just a generic stamp. Therefore, brands and companies need to come up with a philosophy that people can respond to and connect with. They need to put this in action and reflect it on their products, process, and strategy, so that it is not perceived as publicity or green washing.

Zady, for example, is a brand whose actions and products are extensions of the brand's values based on ethical fashion. It curates pieces from artisans and small businesses around US and Europe. The private label it has launched uses natural fiber and has close connections with its suppliers and the farm. It supports conscious consumerism, which aims to have customers rethink about what they're wearing. All these support Zady's minimalistic philosophy, which follows a "less is more" motto: buy less; buy something everlasting; and wear classic pieces that go beyond trends (Chhabra, 2014).

Rather than being confined to a single definition, seeing sustainability as a strategy allows me as a designer and entrepreneur to incorporate it as a core value in my business model, not just my sourcing decisions... I have respect for designers who choose one strategy, and limit themselves to implementing only that one. Instead I choose to study each of them individually and in relation to one another, and I hope one day to answer the question "which one is most sustainable" (Tara St James, founder of clothing label Study, 2014).

Tara St James, founder of clothing label Study, an ethical contemporary brand produced in New York City using sustainable materials, states that there is not

one clear definition or application of sustainability when discussing fashion and it can be better to consider sustainability as a strategy and integrate it as a core value into the business model. Therefore, as per many examples and remedies given above, the best remedy, at least for now, can be for every actor of the supply chain to take any step to incorporate sustainability into their business models.

The future of fashion is a creative problem with a creative solution. Like all art, fashion has the power to change the world (Anne Pringle, Local Buttons, from an article by Walker 2014).

Despite the mixed views on benefits of different models, there are inspiring examples of initiators who use sustainable sourcing and fibers, waste reduction, recycling, up-cycling, and closed-loop system, to have a more sustainable fashion industry. Consequently, the future of sustainable fashion will depend not only how fashion garments are made but also on how they are used, disposed of, and reused and creative solutions will help in this regard.

6.2.8 Role of Consumers in Mobilization of Sustainable Fashion

The changes in climate, the unstable economic conditions, and progress in social consciousness, all lead to discussions around a more sustainable fashion industry. Consequently, consumer engagement to sustainable textiles is becoming more important (Chandak 2014). Even though the main focus of this dissertation is the role of institutional actors in market emergence, there are actions that consumers can take on individual level to support emergence of a sustainable fashion market.

Bethany Noble (2014) makes some suggestions for consumers who care for the society and the environment. These suggestions can be grouped under four main topics: choosing carefully and buying one well-made piece instead of several items; recycling old clothes instead of throwing out; buying ethical, fair trade, and organic products; and carrying out research to make more informed consumer choices.

Similarly, Elizabeth L. Cline (2012), in "*Overdressed: The Shockingly High Cost of Cheap Fashion*," states that our view of clothing needs to change. Instead of worrying about owning the latest or cheapest item, consumers should go back to the old habits and save up for and invest in well-made pieces. They should stop thinking

of clothing as disposable and develop a longer and a meaningful relationship with the clothes they own.

Along with big, radical changes, the small steps taken by each consumer will also help to strengthen the movement. Fast fashion helps to fulfill desire for new but people need to stop and think twice before buying something new and start considering the whole effort put into making of a garment to appreciate its value. Informants also addressed that consumers need to be more considerate and appreciate owning things they value rather than buying into every single trend. People are more likely to value something if they have an input in how it was made or designed, or if they know about the process and the ones who made it. Therefore, consumers need to get more involved with the production process of the clothes they wear.

In her book, *Sustainable Luxe: A Guide to Feel Good Fashion*, Jordan Phillips (2013) rebels against "McFashion" and recommends women to buy less but of higher quality products and support labels or retailers that protect workers in developing countries and that preserve traditional crafts (Kissa 2015). Similarly, Chandak (2014) makes some suggestions for consumers who want to take action to support ethically-conscious and sustainable brands; consume less; consider upcycling, recycling, and reusing garments.

Some of the informants argue that the actions taken to improve the supply chain only have small impact and it does not really shift the system. To tackle sustainability, consumers need to get involved and start questioning their own shopping habits; the current system; and what they really want from their clothes. Unless there is a big demand from the consumers and unless people change their shopping habits and lifestyles, it is unlikely for sustainable fashion market to mobilize.

It is important to consider the initiatives the companies undertake to improve the process and to make the actual production of the garments better. However, this is not enough. Leaving the consumers out of the equation and assuming that continuous consumption and endless desire to buy something new will not change is a wrong start. According to Journalist Vanessa Friedman, chief fashion critic of the New York Times, the solution is to build a sustainable wardrobe that works and has value for the person who has built it. Rickey (2014) also argues that consumers

should consciously select, invest in, and value each item in their wardrobe, which will change what they think of their clothes and the ones who make them.

Similarly, Martinko (2015) underlines that people need to slow down their consumption and create a new, sustainable fashion model, which includes buying better, buying less, and making it last; and supporting garment companies that care about their workers, the society, and the environment. As a result, even though the focus of the study is influence of institutional actors, it is important to consider the collaborative efforts of consumers and institutional actors in market emergence.

In summary, as addressed above, some might argue that the fast fashion industry requires a mindset shift to become sustainable. All the other attempts have little impact. However, I have a more optimistic perspective. There is no easy way to slow-down consumption and production or to convince people to buy less number of valuable items and make them last. This can happen in time but for now the solution lies in institutional actors working in a more ethical and environment friendly way so that at least the things consumed and produced will be more conscious of the environment, workers, and the society. In this regard, actors' institutional work, such as designing, manufacturing publicizing, and selling fashion, can help to reshape the established fast fashion system or it can contribute to create a more sustainable fashion market.

7. CONCLUSION

As discussed in previous sections, the current fast fashion system based on speed of availability and offering latest fashion trends at affordable prices, enhances economic growth and earnings by providing job opportunities and by facilitating the development of businesses; democratizes fashion and enables its diffusion and use by many; and enhances satisfaction by fulfilling consumers' desire for new. However, the current system also leads to deterioration of resources; increases textile waste; has negative consequences on welfare of workers, society, and environment; and promotes homogenization of design leading to lack of value and originality.

Despite its benefits, the environmental and social problems that fast fashion creates cannot be ignored and if the current system based on continuous production and consumption continues at this speed, the impacts on ecological and social environment will pose a threat for future generations. Therefore, current mindless fashion consumption and production cannot continue forever and sustainability should become a part of the fashion system and industry.

Recent incidents such as the Rana Plaza building collapse in Bangladesh, climate changes, and conflicts over decreasing natural resources, have changed our approach to production and consumption of fashion, transforming sustainable fashion business models from a niche to a necessity (Chandak (2014). Sustainability is no longer seen as another set of barriers. Instead, fashion is regarded as a catalyst for changing the way we think about things (M. Lee 2011).

Prior studies carried out on sustainable fashion and other alternative approaches to fast fashion also make some promises. Even in the field of fashion, whose key feature is rapid and continual changing of styles to create product obsolescence sustainability ideals and efforts can be encouraged by marketplace actors. As McRobbie (1997) argues it is not appropriate to view fashion industry as unmanageable, as there are always opportunities for change, as per the examples

shared in previous sections.

Currently, within the industry, on one side there are high street fast fashion retailers that promote constant consumption. On the other side, there are institutional actors such as Dilys Williams, the director of Centre for Sustainable Fashion (CSF); Kate Fletcher, author of *Sustainable Fashion and Textiles* and pioneer of the "Slow Fashion" concept; and Sandy Black, author of *Eco Chic: the Fashion Paradox*, who want to challenge fashion's current status quo and shape the future of fashion.

The purpose of this dissertation is to give a theoretical explanation of how a new sustainable fashion market emerges by examining the conditions in which fast fashion actor-network is subject to major translations. The findings help to understand the dynamics that mobilize actors to seek market change; the barriers and driving factors in market mobilization; the initiators of change and their roles in market formation. The three main characteristics of the industry addressed in the study -speed, affordability, and design- both hinder and facilitate the emergence of a sustainable market and are used to explain how logics of fashion interact to create new markets.

Findings show that greed for economic growth; desire for new; lack of trust in the institutions; lack of knowledge, awareness, and legitimacy; globalization and lack of transparency; and lack of aesthetic appeal of sustainable products, hinder the mobilization of a sustainable fashion market. Along with these barriers, there are driving mechanisms that shape the industry to become more sustainable. Unhealthy working conditions and stress; depletion of natural resources; increase in textile waste and overstock; lack of quality and uniqueness; protests and criticisms; enforcement of standards; becoming a pioneer and gaining competitive advantage facilitate the emergence of a sustainable fashion market.

There are conflicting perspectives on future of fashion as well. Change has started to happen both at institutional and consumer levels but the main focus of this study is the role of institutional actors in market emergence. Existence of sustainable fashion companies, brands, designers, and practices signify that sustainable fashion markets and actor-networks are already mobilized and are acting along their fast fashion competitors. There are improvements on environmental and social conditions, such as using sustainable fibers and sourcing, enhancing supply chain

transparency and standards, promoting textile recycling and up-cycling, and waste reduction.

On the other hand, fast fashion represents today's' consumption society and despite the sustainable approaches to fashion and the actions taken by different actors, there are still many ambiguities, and difficulties regarding the future of a sustainable fashion system. Changing the entire industry is a long term commitment and it is still not clear whether sustainable fashion movement will challenge the global dominance of fast fashion. Therefore, changing the system is possible but not easy and it is more likely to be in small steps and not on a big scale.

With this thesis study, I do not intend to answer whether sustainable fashion will dominate or replace fast fashion or to argue that it is a better option, creating more ethical forms of consumption. Instead, my focus is to understand the process of market emergence. However, examining the conflicting perspectives on future of fashion help to understand the emergence of the new market better. Emergence of new markets does not have to be a result of consumer practice. It can be motivated by new philosophies and interaction of institutional actors. Similarly, sustainable fashion market is driven by different philosophical concerns, conflicts, and criticisms. By examining the process of market emergence and how the new actor-network institutionalizes, this study contributes to previous research on market system dynamics.

7.1 Theoretical Contributions: Process of Market Emergence

Previous research on market system dynamics studying what leads to the creation of new markets or to significant changes in existing markets (i.e. Thompson and Coskuner-Bali 2007, Giesler 2008, Sandicki and Ger 2010, Scaraboto and Fischer 2013, Martin and Schouten 2014, Dolbec and Fischer 2015), often examined the role of consumers (See Table 2). Only some emphasized marketers as the main agents of marketplace dynamics (i.e. Humphreys 2010, Giesler 2012). Humphreys (2010) explains how markets emerge from a mega marketing perspective and how actor-networks create markets and consumers. Her theorization shows that the creation of new markets is a political and social process of legitimization, affected by the environment outside the firm or industry.

Prothero and colleagues (2011) also address that macro institutional approaches to sustainability are becoming more critical. However, to date, little attention has been paid to institutional side of market formation, especially within context of fashion. Similarly, most of the prior studies on sustainable approaches to fashion examined the consumer-side and were micro-oriented (i.e. Pears 2006; Niinimäki 2010; Joy et al. 2012). Studies that consider different actors of the fashion system are limited (i.e. Cataldi et al. 2010). This study fills this gap by considering the creation of new markets as a cultural, political, and social process. It provides a theoretical explanation of how new markets emerge within context of fashion and focuses on institutional actors as the initiators of marketplace dynamics.

Furthermore, most of the prior studies examined either consumers' or marketer's role in market formation and market change (See Table 1 and Table 2). Market change dynamics and market creation is more likely to occur with support of and collective action of different actors (McRobbie 1997; Cataldi et al. 2010; Struben and Lee 2012). Rather than pursuing a dichotomous view of emergence of markets - through consumer practice or institutional structures, the study contributes to Market System Dynamics literature, Institutional theory, and actor-network theory by having a more macro perspective of market formation.

I examine the sustainable fashion movement as a process of translation, focusing on the actors in the network. Analysis of the findings show that change is beginning to happen at both institutional and consumer levels. However, emergence of sustainable fashion is not initiated by consumer effort as sustainable fashion movement did not start from consumer practice. In this case, no consumer engagement has created the demand; the market has emerged before cultural practice, unlike most of the prior market emergence models. It is the consequence of joint efforts of actors and network, and institutional actors are the ones initiating and leading the change. Similar to Humphreys' theorization (2010) institutional actors work together as a system to create the market.

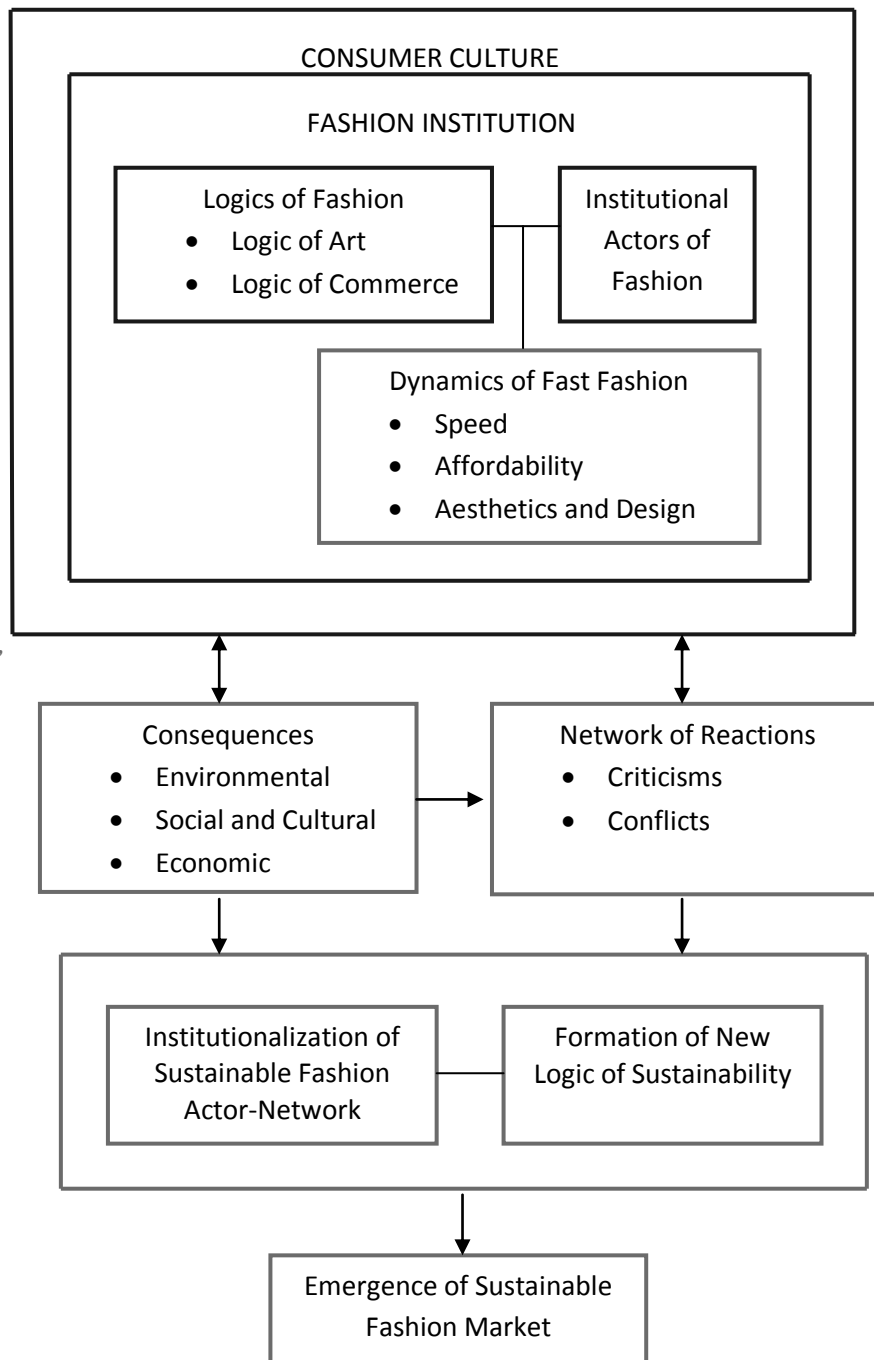


FIGURE 2: Process of Market Emergence - II

Figure 2 shows the process of market emergence in the field of fashion. Conceptual model based on analysis of the findings shows that, emergence of sustainable fashion market is driven by philosophical concerns and social, cultural,

economic, and environmental happenings. Consequences of these happenings and changes raise questions about the current fast fashion industry leading to criticisms and conflicts within the existing actor-network, which facilitate the emergence of a new actor-network, new "logic of sustainability" and a new sustainable fashion market within the system. Therefore, emergence of sustainable fashion has an institutional formation.

Some of the earlier approaches to market system dynamics often emphasize one actor-network and how it mobilizes. However, similar to Baudrillard's idea of system of objects, which argues that one object's meaning is only understandable through its relation to the meaning of other objects, markets can create potential for other markets. For instance, counterfeit markets are not separate from genuine markets. Genuine markets create potential for counterfeit markets and existence of counterfeit markets make genuine markets. They are not separate systems; they are part of the same system of objects and they work together as a system. Similarly, fast fashion market enables the emergence of sustainable fashion market and the two markets exist together within the same system.

Consequently, sustainable fashion market is not likely to be legitimized without the fast fashion market. The new market emerges from criticisms and consequences of fast fashion and exists along the fast fashion market. Similarly, sustainable fashion actor-network is not a separate and an independent actor-network. It may not even have existed if fast fashion actor-network did not exist, which indicates that existing actor-networks can lead to emergence of new actor-networks within the same system. The two actor-networks can even overlap. On the other hand, sustainable fashion is guided by a different philosophy. Therefore, the actors can be the same but they are acting differently. Consequently, sustainable fashion market depends on fast fashion. As fast fashion becomes bigger and stronger its consequences become stronger, intensifying the criticisms leading to formation of the sustainable fashion market.

In study of Martin and Schouten (2014), shared practices of consumers lead to market level changes and consumer-driven market creation within an existing industry. In the case of sustainable fashion, institutional actors such as sustainable fashion designers and brands, drive the formation of a new market within the existing

fashion industry. They work to develop products and practices that exist together with and mirror the mainstream fast fashion retailers and products. The growth of practices such as sustainable fashion weeks, seminars, and catwalks, and interactions such as blogs, web forums, and swishing events facilitate shared practices leading to market creation driven by institutional actors.

In previous studies, institutional entrepreneurs, play an important role in encouraging consumers to take action (i.e. Thompson and Coskuner-Balli 2007; Scaraboto and Fischer 2013). Thompson and Coskuner-Balli (2007) describe collaboration between consumers and entrepreneurs to create a separate market that conformed to countercultural values. In Scaraboto and Fischer's (2013) context, neither consumers nor the institutional entrepreneurs are intending to escape the mainstream market. However, in both markets consumers have been inspired from institutional entrepreneurs. In the case of sustainable fashion, institutional entrepreneurs such as slow fashion designers (i.e. Katharine Hamnett), ethical retailers (i.e. TRAIID), institutions and coalitions (i.e. London College of Fashion, Sustainable Apparel Coalition, REC), have started to inspire change efforts.

Furthermore, in most of the prior studies, consumers resist prevailing market logics and refuse to contribute to the profits of mainstream marketers (i.e. Thompson and Coskuner-Bali 2007; Giesler 2008). Similar to Martin and Schouten's (2014) argument, findings show that resistance to prevailing market logics is not a prerequisite for new market formation. Rather than taking an activist bent to market emergence, sustainable fashion market mirrors mainstream fast fashion market and it does not resist the existing market logics. However, the findings add a different perspective to Martin and Schouten's study, as there is resistance against the consequences of fast fashion. These criticisms encourage emergence of sustainable fashion but they do not eliminate fast fashion. The two markets seem to be working together. Therefore, the current model lies in between the resistance models and models that exactly mirror or are in line with the existing market.

My findings on institutional logics can further be compared with Dolbec and Fischer's (2015) recent study, where consumers' engagement and desires initiated the new "logic of accessibility". Dolbec and Fischer (2015) observe that consumers interacting in online fashion arenas often behaved in line with prevailing logics of

commerce and art. However, consumers' engagement also initiated a new logic, which they refer to as "logic of accessibility." The new logic suggests that fashion should be accessible both in terms of relative affordability, and in terms of wearability. Similarly, in this study a new logic, which I call the "logic of sustainability," emerge along with the prevailing industry logics of art and commerce.

In both cases the new logics co-exist with but do not replace previous logics. New institutional logic emerges but the actors continue to support the pre-existing logics as well. Therefore, similar to Dolbec and Fischer's (2015) findings new logics enter in an evolutionary rather than revolutionary fashion. The difference is in the case of logic of accessibility, contended consumers interacting in the online fashion arenas and who do not intend to change the market, initiate the new logic. Whereas in case of logic of sustainability, purposeful actions of institutional actors facilitate the establishment of the new logic.

Studies of Thompson and Coskuner-Bali (2007) on the community sponsored agriculture movement; Martin and Schouten (2014) on the mini-moto market; Scaraboto and Fischer (2013) on plus-size fashion activists ("fatshionistas"); Sandicki and Ger (2010) on veiling; and recently Dolbec and Fischer (2015) on engaged consumers in online fashion arenas, all show that consumers actions to intentionally or unintentionally change markets create opportunities for entrepreneurial actors who often benefit from these efforts. In my study, instead of consumers, actions of institutional actors such as sustainable fashion designers and fashion institutions open up opportunities for brands, retailers, and producers.

Finally, former studies on market system dynamics (i.e. Giesler 2012) mostly examine if an actor-network will mobilize. My purpose is not to argue whether sustainable fashion actor-network will mobilize. Instead, I examine how criticisms and conflicts within the current actor-network create new markets and new actor-networks, which I hope will help to understand the actor-network structures that consumers need and the social construction of the consumer. Therefore, the study brings a broader perspective to market system dynamics literature by examining what is happening in the marketplace; the different actors creating the markets; their roles in market formation; and the points of conflict between them. Furthermore, similar to

Dolbec and Fischer's (2015) recent study, it expands the scope of market level dynamics by focusing on institutional work, actors, and institutional logics, rather than products, brands, or producers.

7.2 Limitations and Future Research Opportunities

Formation of new markets is not only firm or consumer-driven. Prior research examined mostly the consumer-side and I mainly focused on the institutional side. It is important to consider the initiatives of the institutional actors to improve the process and to make the actual production of the garments better. However, leaving the consumers out of the equation and assuming that continuous consumption and endless desire to buy something new will not change is not right. To tackle sustainability, consumers need to get involved and start questioning their own shopping habits. Furthermore, some of the remedies such as creating closed-loop systems require consumers' collaboration. Therefore, future research can examine the collaborative efforts of consumers and institutional actors in market emergence and mobilization.

In this study, I suggest that philosophical concerns, criticisms, and consequences of fast fashion facilitate the mobilization of sustainable fashion actor-network, which leads to creation of the sustainable fashion market. The emergence of the new market can have important consequences on changing consumer behavior, which I did not respond yet. Therefore, future research can examine social construction of the consumer by the new actor-network and the potential demand that this network creates, focusing on the interaction between consumers and institutional entrepreneurs.

Future studies can further examine the sustainable fashion communities to understand the different motives consumers have in being a member of these communities and what is encouraging these practices to continue or causes them to fade away. In this regard, the psychological role of materialistic consumption can be examined focusing on micro-level and psychological barriers such as consumer's desire for new, desire for comfort, convenience, and practicality.

Context is very important because the situation in emerging and developing markets is different than the situation in Western and Northern Europe. Therefore, sustainable fashion actor-network in one part of the world may be different from than

sustainable fashion actor-network in other parts of the world. There may be multiple sustainable fashion actor-networks in different parts of the world. Furthermore, it is difficult to examine emergence of sustainable fashion in isolated contexts because of the globalized nature of the fashion industry. Moreover, global brands can adopt different strategies in different countries, so it is a challenging issue. Future research can compare sustainable fashion in Western context and in less developed countries to understand if findings differ and examine the impacts on the developed versus developing countries. Development of the new market can even be considered as a diffusion process starting in Europe and spreading to other countries.

Future studies can further follow a longitudinal approach and examine how fast fashion and sustainable fashion markets exist together and the progress of translation. Studies can examine if stages of translation for sustainable fashion actor-networks are different compared to than Callon's stages of translation. Along with the context it is also important to consider the fragmentation of fashion industry. For instance, sustainability in luxury fashion is not the same as sustainability in fast fashion. Therefore, future research can examine the impact of this fragmentation.

Finally, as this is a dissertation I tried to cover many aspects of the sustainable fashion market. Future research can be more focused and concentrate on different stages of the supply chain. For instance, actions of institutional actors in incorporating post-consumer textiles in new collections, including the challenges and limitations of using recycled garments, can be an interesting topic to examine. Another interesting future research topic is examining the unintended consequences of second-hand clothing or donations, since many clothing companies are closing as second-hand clothes are coming in, especially to developing countries like Africa, having negative implications on the local businesses.

With this dissertation I hope to bring a new perspective to process of market emergence within the field of fashion. Along with its theoretical contributions and marketing implications, the study also opens up many opportunities for future research, as addressed above. Consequently, despite the dynamics and the challenges of the industry, fashion can become a medium and a platform for sustainability and it facilitates generation of new ideas, practices, and markets.

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APPENDICES

APPENDIX 1: Interview Guide

1. What is your role within the fashion system?
2. Can you describe your job and daily routine at work.
3. Who do you work with?
4. Can you describe your relation with these actors?
5. What causes stress at work? Can you talk about the tensions and challenges?
6. What are your thoughts and feelings on current fast fashion system?
7. What are the consequences of this system?
8. What are your thoughts and feelings on sustainable fashion?
9. What do you and your company do in this regard? Can you give some examples.
10. What is the industry and different actors within the industry doing regarding sustainable fashion? Can you give some examples.
11. Who do you think are the initiators?
12. What is the situation in Turkey compared to Western countries?
13. What are the driving factors to participate or not to participate in this movement?
14. How do you think this movement will influence the fashion industry?
15. How do you see the future of fashion?

APPENDIX 2: Details of the Secondary Data

Topic	Title	Issue Place and Date
Remedies (22 examples)	"Inside the London College of Fashion's eco-hub"	The Ecologist, M. Lee 15 September 2011
	"What is Slow Fashion and Why Does It Matter?"	Ecouterre, J. Robertson 3 May 2012
	"Talk Less Do More"	A. McIntosh 21 January 2013
	"The Fetishization of Transparency"	Post by K. Fletcher 13 June 2013
	"Slow Fashion: The case for fewer but better clothes"	K. Tyner 31 March 2014
	"Tough List Handed over by the Textile Industry"	Papernet 1 April 2014
	"Why the fashion industry's 'Maccas burger and fries' solution is not a good idea"	B. Noble 15 April 2014
	"Vanessa Friedman's Fashion Manifesto"	M. Rickey 1 May 2014
	"Fashion forward: Building a sustainable, ethical fashion future"	J. Walker 2 May 2014
	"Going Green: The Quality Factor"	J. Rodie, Textile World May/June 2014
	"Lessons from the stylish: Katharine Hamnett"	Telegraph 17 May 2014
	"3p Weekend: 10 Budding Trends in Sustainable Fashion"	M. Mazzoni 23 May 2014
	"How Natural Capital Accounting Can Become Your Newest Communications Tool"	J. Richens 26 May 2014
"Farm-To-Closet: New York's Latest Fashion Startup Goes Old School"	Forbes 27 August 2014	

	<p>"Vivienne Westwood on capitalism and clothing: 'Buy less, choose well, make it last'" - video</p> <p>"For Ethical Fashion, Global Issues Present Opportunities, Not Hurdles"</p> <p>"Eco fashion predictions for 2015"</p> <p>"Is Sustainable Fashion A Luxury"</p> <p>"Fashion Brands Must Treat Garment Workers as Employees"</p> <p>"Conscious Consumers Are the Key to Ethical Fashion"</p> <p>"T-Shirt Vending Machine Shows Shoppers Real Cost of Cheap Fashion"</p> <p>"Sustainable fashion is slow fashion - because fast comes at a price"</p>	<p>The Guardian 29 October 2014</p> <p>Ecouterre, J. Donatelli 8 December 2014</p> <p>Ecouterre L. Kissa 11 January 2015</p> <p>Business of Fashion, E. Hertzman, 27 April 2015</p> <p>Business of Fashion, B. Pieters, 29 April 2015</p> <p>Ecouterre, L. Zimmer 29 April 2015</p> <p>Ecologist, R. Styles 8 June 2015</p>
<p>Conscious and Eco Collections, Recycling and Upcycling Examples (21 examples)</p>	<p>"H&M for Brick Lane Bikes Collection"</p> <p>"Long Live Fashion! H&M Conscious"</p> <p>"Take it to H&M"</p> <p>"A Swedish denim label wants to change the way we wear our jeans"</p> <p>"H&M Conscious Exclusive Collection"</p> <p>"Dresses from Garbage"</p> <p>"5 Fast Fashion Brands You Didn't Know Had Eco-Friendly Lines!"</p> <p>"H&M's Global Garment Collecting Initiative"</p> <p>"The Green Life"</p> <p>"Turning Old Into New with Reused Sustainable Fibers"</p> <p>"The Rag Bag Encourages Shoppers to Donate Unwanted Clothes"</p> <p>"Topshop Launches Third Upcycled Reclaim to Wear Collection"</p>	<p>H&M Press Release 12 February 2013</p> <p>Hurriyet, 16 March 2013</p> <p>Hurriyet, 16 March 2013</p> <p>Guardian, L. Borromeo, 17 March 2014</p> <p>IMA, 20 March 2013</p> <p>Hurriyet, 21 March 2013</p> <p>The Sustainable Fashion Academy, 7 April 2014</p> <p>Vogue Turkey 22 April 2014</p> <p>Vogue UK, May 2013</p> <p>J. Lee 14 May 2014</p> <p>Ecouterre, J. M. Chua 26 June 2014</p> <p>Ecouterre, J. M. Chua 19 August 2014</p>

	<p>"Garden Of Denim Design"</p> <p>"Dutch denim company lets you lease organic and recycled jeans"</p> <p>"The Piece Project: Part One"</p> <p>"Esprit Fetes Third Recycled Clothing Collection"</p> <p>"Is It Eco? Topshop Launches 3rd 'Upcycled' Reclaim To Wear Collection: Behind The Label"</p> <p>"Can fashion become a zero waste industry?"</p> <p>"Aliş Değiş (Swishing) Event"</p> <p>"H&M And DoSomething.org Team Up With Victoria Justice For Second Annual Comeback Clothes Campaign, Retail's Largest Garment Collecting Program"</p> <p>"H&M, Kering, Worn Again Team Up to Close the Loop on Textiles"</p>	<p>Godd-design blogspot</p> <p>Treehugger</p> <p>10 September 2014</p> <p>Trash is for tossers</p> <p>October 2014</p> <p>Ecouterre, J. M. Chua</p> <p>7 October 2014</p> <p>Ecosalon, J. Ettinger</p> <p>8 October 2014</p> <p>Guardian, H. Gould</p> <p>16 October 2014</p> <p>IMA Blog</p> <p>17 October 2014</p> <p>PRNewswire</p> <p>19 March 2015</p> <p>Ecouterre, J. M. Chua 2</p> <p>April 2015</p>
<p>Consequences (15 examples)</p>	<p>"The Cost of Carbon"</p> <p>"Nation of bad dressers: Everyone looks the same and their clothes have never been so ugly, says Vivienne Westwood"</p> <p>"6 Things You Need To Know About Your Clothes"</p> <p>"The shirt on your back: the human cost of the Bangladeshi garment industry"</p> <p>"Can Fast Fashion Really be Sustainable?"</p> <p>"T-Shirt Travels: A Documentary on Second-Hand Clothes in Africa 2001"</p> <p>"Cambodian Garment Workers Are</p>	<p>Newsevents, UAL</p> <p>21 December 2009</p> <p>Daily Mail, Liz Thomas</p> <p>20 February 2012</p> <p>Urban Times</p> <p>April 2014</p> <p>The Guardian</p> <p>April 2014</p> <p>R. Godelnik</p> <p>29 April 2014</p> <p>Follow the Things</p> <p>Ecouterre, J. M. Chua</p>

	<p>Working Themselves to Death"</p> <p>"Unfilled Rana Plaza Fund Exposes Fashion's Lack of Accountability"</p> <p>"We Buy An Obscene Amount Of Clothes. Here's What It's Doing To Second-hand Stores"</p> <p>"Cotton Road, a Film About How Our Clothes Are Made"</p> <p>"Cambodia Fails to Protect Garment Workers, Says Human Rights Watch"</p> <p>"Clothing Poverty: The Hidden World of Fast Fashion and Second-hand Clothes"</p> <p>"Why don't you care who made your clothes?"</p> <p>"Watch the Trailer for The True Cost, a Film About Fashion's Dark Side"</p> <p>"We must divert our attention to Sustainable Fashion"</p>	<p>18 August 2014</p> <p>Business of Fashion</p> <p>19 August 2014</p> <p>The Huffington Post, S. Boboltz</p> <p>19 November 2014</p> <p>Ecouterre, J. M. Chua</p> <p>5 January 2015</p> <p>Ecouterre, J. M. Chua</p> <p>13 March 2015</p> <p>Zed Books-Reviews</p> <p>C. Criado-Perez</p> <p>22 April 2015</p> <p>Ecouterre, J. M. Chua</p> <p>19 May 2015</p> <p>Bursaligil Blog</p> <p>25 May 2015</p>
<p>Fashion Weeks, Fairs, Seminars, Awards</p> <p>(14 examples)</p>	<p>"Environmental Friendly Fashion"</p> <p>"Corporate Sustainability Certificate Program"</p> <p>"The Copenhagen Fashion Summit is taking place April 24th!"</p> <p>"Madrid to host Sustainable Fashion Conference"</p> <p>"Obakki, H&M to hit Vancouver's Eco Fashion Week"</p> <p>"Vancouver's Eco Fashion Week challenges retailers be responsible"</p> <p>"Copenhagen fashion summit: seven things we learned"</p> <p>"H&M is a part of Copenhagen Fashion Summit"</p> <p>"Vancouver Eco Fashion week "</p>	<p>IMA, 26 March 2013</p> <p>REC</p> <p>31 January 2014</p> <p>Slow Fashion Forward</p> <p>7 April 2014</p> <p>The Sustainable Fashion Academy, 10 April 2014</p> <p>S. Rowland</p> <p>23 April 2014</p> <p>The Vancouver Sun, L. Hyslop, 23 April 2014</p> <p>Guardian, M. Rickey, 24 April 2014</p> <p>H&M</p> <p>25 April 2014</p> <p>Facebook</p>

	<p>"Kering Awarded with the Global Leadership Award in Sustainable Apparel"</p> <p>"The Eco Fashion Week seminars"</p> <p>"Vancouver ECO Fashion Week Educational Seminars"</p> <p>"Sustainable Store Of The Year"</p> <p>"Marketing Summit Istanbul: Change the Game"</p>	<p>25-28 April 2014</p> <p>Textiles Update 25 April 2014</p> <p>Eco Fashion Week April 2014</p> <p>Slow Fashion Forward 1 May 2014</p> <p>The World of Nudie Jeans, 14 May 2014</p> <p>3-4 December 2014</p>
<p>Discussions and Paradoxes (12 examples)</p>	<p>"Sustainability and performance in textiles: can you have it all?"</p> <p>"Does Responsible Consumption Benefit Companies More Than Consumers?"</p> <p>"Is 'Progress' Good for Humanity?"</p> <p>"An Industry in Denial: Fashion's Struggle with Compliance"</p> <p>"Sustainable Fashion: From Niche to Necessity"</p> <p>"Why is Slow Fashion So Slow to Catch On?"</p> <p>"Ecochic's winner Kevin Germanier: sustainability fashion are forever linked"</p> <p>"H&M has been hoodwinked by its own sustainability mandate"</p> <p>"H&M CEO: Buying Less to Save the Planet Would Create Social Catastrophe"</p> <p>"For Sale: New Fashion Terms For an Old-Fashioned Industry"</p>	<p>Guardian, D. Hoguet 10 April 2014</p> <p>B. Schiller 9 September 2014</p> <p>J. Caradonna 9 September 2014</p> <p>BOF, E. Hertzman 30 September 2014</p> <p>The Fashion Globe, T. Chandak, November 2014</p> <p>N. Gonzalez 5 January 2015</p> <p>Ecouterre, J. M. Chua 9 February 2015</p> <p>K. Martinko 17 February 2015</p> <p>Ecouterre, J. M. Chua 19 February 2015</p> <p>O. de Castro 12 March 2015</p>

	"H&M's sustainability report hides the unsustainable reality of fast fashion" "How can we safeguard the people who make our clothing?"	M. Bain 12 April 2015 Business of Fashion 28 April 2015
Actions of Retailers and Brands (11 examples)	"Nike's New Colordry Dyeing Technology Cuts Out Chemicals and Water" "Ethical Brand? Does Tesco have a new model?" "H&M, Inditex Join Campaign to Eliminate Endangered Forests from Clothing!" "H&M Tackles Business And Environmental Risk With Cutting-Edge Water Strategy" "TOMS Shoes and the Neoliberal Gospel" "Lindex Increases Sustainability by 39%, Reduces Electricity Consumption and Adapts More Cleaner Production" "Sustainability at H&M: Long Road Traveled, Long Road Ahead" "Eco-friendly clothing brands limit their impact on the environment" "Cheap Clothes With A Clean Conscience" "Levi's Comes Clean About the Environmental Impact of Its Jeans" "Marks & Spencer, Gentle Giant"	Ecosalon 1 February 2014 Reuters, E. Thomasson 12 March 2014 Slow Fashion Forward 7 April 2014 Slow Fashion Forward 7 April 2014 L. Hulsether March/April 2014 Textiles Update 27 May 2014 Supply Chain Brain R. J. Bowman 27 May 2014 Vail Daily 1 June 2014 Daily Mail, G. Champ 22 June 2014 Ecouterre, J. M. Chua 18 March 2015 Business of fashion, K. Abnett, 26 April 2015
Industry Information and Consumer Insight (9 examples)	"Zara's Way: How Fast Fashion Snared Us With Low Prices, Quick Changes" "The Secret World of Fast Fashion"	Ecouterre, L. Siegle 9 August 2011 C. Moon 17 March 2014

	<p>"The man from Zara"</p> <p>"Primark Plans US Expansion, But Will They Succeed?"</p> <p>"Premiere Vision AW 15/16 Trend Analysis"</p> <p>"Autumn Winter 2015/2016 Consumer Insight"</p> <p>"Infographic: Fast Fashion Is Disposable But Damaging"</p> <p>"A Brief History of Sustainable Fashion"</p> <p>"Find Early, Lose Quickly"</p>	<p>IMA Blog, April 2014</p> <p>Reuters 16 July 2014</p> <p>WGSN 10 October 2014</p> <p>WGSN 31 October 2014</p> <p>Ecouterre, J. M. Chua 6 November 2014</p> <p>N. Gonzalez 19 February 2015</p> <p>Cumhuriyet 11 May 2015</p>
<p>Projects, Funding, and Collaborations (9 examples)</p>	<p>"i-Sustain: Paralympians Part Of LCF And i-D Collaboration"</p> <p>"Redress"</p> <p>"Turkish Fashion-ID Project"</p> <p>"Sea Shepherd's New Plan to Turn Ocean Plastic into Sustainable Fashion"</p> <p>"Stella McCartney, G-Star Raw Join Forces With Cradle to Cradle Institute"</p> <p>"Zero Waste Scotland Announces Fund for Sustainable-Fashion Designers"</p> <p>"Fashion Remake with Coca-Cola and Ekocycle™"</p> <p>"Pharrell Williams, Woolworths Team Up to 'Make Sustainability Cool'"</p> <p>"Eileen Fisher on Sustainability: We're All in This Together"</p>	<p>i-Sustain 9 December 2011</p> <p>Redress website</p> <p>IMA facebook 27 January 2014</p> <p>Slow Fashion Forward 7 April 2014</p> <p>Ecouterre, J. M. Chua 18 November 2014</p> <p>Ecouterre, J. M. Chua 20 November 2014</p> <p>C.L.A.S.S. 26 February 2015</p> <p>Ecouterre, J. M. Chua 13 April 2015</p> <p>Ecouterre, J. M. Chua 1 June 2015</p>
<p>Criticisms, Protests, Tragic Events (8 examples)</p>	<p>"Greenpeace Exposes Toxic Chemicals in Zara, Other Fast-Fashion Brands"</p> <p>"Greenpeace's 501 Uprise"</p>	<p>Ecouterre, J. M. Chua 21 November 2012</p> <p>Hurriyet 14 December 2012</p>

	<p>"Hazardous Clothes for Children"</p> <p>Cumhuriyet 14 January 2014</p> <p>"Phasing out the toxic chemicals in children's clothing"</p> <p>The Guardian, C. A. Lee 3 February 2014</p> <p>"I Thought I Wouldn't Survive: Rana Plaza Survivors Tell Their Stories"</p> <p>C. Waters 16 April 2014</p> <p>"Time To Act - Today! Who Made My Clothes?"</p> <p>Slow fashion forward 24 April 2014</p> <p>"Green is the New Black: How Consumers Feel About Sustainable Apparel"</p> <p>Triple Pundit 19 May 2014</p> <p>"Forever 21, H&M, Mango, Zara Frequently Fail Quality, Safety Tests"</p> <p>Ecouterre, J. M. Chua 28 August 2014</p>	
<p>Other Examples and Initiators of Change (8 examples)</p>	<p>"The Sustainable Brand Index"</p> <p>Sustainable Brand Insight 2014</p> <p>"30 Ethical Fashion Loving Blogs to Check Out"</p> <p>Ethicalfashionblog.com 10 July 2014</p> <p>"Melissa Joy Manning's Handmade Jewelry Fuses Luxury, Sustainability"</p> <p>Ecouterre, M. Matus 26 September 2014</p> <p>"Indelust"</p> <p>Indelust.com</p> <p>"#Befair: Fairness in fashion has to come now"</p> <p>FairTrade Blog 30 September 2014</p> <p>"Why London is Fast Becoming an Epicenter for Sustainable Fashion-examples"</p> <p>Vogue, S. Mower 31 October 2014</p> <p>"The Business of Fashion in Conversation with Stella McCartney on Building a Sustainable Luxury Brand"</p> <p>Business of Fashion 26 March 2015</p> <p>"Nordic Countries Launch Action Plan for Sustainable Fashion"</p> <p>Ecouterre, J. M. Chua 28 April 2015</p>	

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