



SUSTAINABILITY IN FASHION IN VISEGRAD 4 COUNTRIES

IDEA LAB – Sustainability through talent development

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European Fashion Accelerator
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1. Introduction

The European Fashion Accelerator (EFA) is a project that has been supporting Visegrad 4 fashion's young creative talent for over 8 years. The main aim of the project is to provide targeted education and promotion to young Central European creatives and change the local creative industry for the better.

We recognise the growing importance of sustainable agenda in fashion. As part of our IDEA LAB and commitment to support sustainable development and business practices in fashion, we took a closer look at current sustainable fashion practices within the V4.

The aim was to utilise current thinking in the field of sustainable fashion, consult young as well as established fashion designers, schools and universities on their views and practical issues that they face in this area.

2. Objectives

The key objective was to lay foundations for development of sustainability evaluation criteria contextualised to the V4 region that can be used in the future as a steppingstone to assess sustainability readiness of local fashion start-ups/young designers. Furthermore, these can be utilised in sustainable fashion education across our partners.

Equally critical was gathering and evaluation of baseline information provided by the respondents to assess attitudes, current status quo, and perceived positives and negatives of sustainability agenda among different respondent groups.

3. Methodology

A qualitative study consisted of

- An online consultation with EFA partners
- A qualitative survey (structured questionnaire designed with an option to further follow up on key identified themes)

The online consultation explored relevant criteria and frameworks to assess sustainability in fashion. The outcome was a design of a structured questionnaire based on principles and frameworks informed by the Common Objective's Sustainability Roadmap Toolkit and UAL LCF Centre of Sustainability Fostering Sustainable Practices. Refer to Appendix 7.2 and 7.3 for questionnaire templates.

The qualitative survey targeted three respondent groups between January and February 2021:

- Small local fashion brands (micro and small fashion enterprises: MSE)
- University and further education students of fashion related programmes
- Professors and lecturers of fashion related programmes

There were two survey templates. One for small fashion brands, the other for respondents in education (students, professors and lecturers). Templates mirrored each other and covered the following topics: brand and personal values and sustainability; customers and sustainability; fashion business practice and sustainability; local impact on wider fashion sustainability agenda, and sustainable fashion education. The online survey was circulated among EFA and partners' networks.

3.1. Data protection

Completion of the survey was voluntary. All information was collected in compliance with the current GDPR legislation and ethical research and guidance principles. Personal and business information was kept confidential and was not shared outside of the research team coordinated by European Fashion Accelerator.

4. Results

In total, the survey yielded 55 responses. 10 respondents were from micro and small fashion businesses. Four of these brands were 6–10 years in existence, two brands were 4–5 years old, and four brands were founded between 1–3 years ago. Refer to Appendix 7.1 for further detail.

On the schools and universities side, overall, there were 45 responses, of which 19 respondents were from universities, 20 respondents from further education institutions and 6 respondents were professors and lecturers.

4.1. Values and sustainability

Respondents were asked either about their brand values and sustainability (brand survey) or personal values and sustainable principles (education survey).

Small fashion brands

80 % of the brands have defined brand values whilst 20% have them defined partially, confirming that they are further working on it. We then asked whether some of their current brand values relate to sustainable principles. Those who answered yes, cited:

local production, use of sustainable and natural materials, focus on high quality design, local production and collaboration with local artisans participating in preservation and regeneration of communities and techniques, upcycling, application of zero waste principles, full transparency and ethical way of working and producing and education of customers about brand relevant sustainable principles.

Schools and universities

51% respondents from schools/universities confirmed that some of their personal values align with sustainable principles. In addition, 47% respondents agreed partially.

When asked whether they think every fashion brand should nowadays have a sustainability strategy in place, the majority of students responded that brands should have a sustainability strategy in place to reflect the world that we are living in. This was supported by a strong yes response from all educators.

"Yes, it is something beyond a local or short-term trend. We have to handle and reflect sustainability in all aspects and parts of our everyday private and professional lives and act according to it."

Student

"The strategy is good, but it depends if it's really sustainably applied or it's just a marketing showstopper."

Student

4.2. Customers

Small fashion brands

When asked what their customers value the most, the brands indicated that their customers value the most:

- high-quality materials
- local production
- personalised customer service
- timeless seasonal designs

On the other side of the response spectrum, valued the least by their customers, were vegan products, brand's support to a good cause/charity and ability to recycle directly with the brand.

When asked about what their customers are concerned about the most when it comes to issues related to sustainability in fashion, most brands support local businesses. This corresponds with what the customers value the most.

The most cited barrier to changing customer's behaviour towards purchasing sustainable products is:

- high price
- influence of fast fashion
- lack of customers' understanding of value and price.

"The contemporary status quo presents garments as goods of consumption rather than something that should be carefully collected."
Designer/owner of a small fashion brand

Schools and universities

Students and educators mentioned the most that typical customers of small fashion brands value the most:

- high quality materials
- local production

This corresponds with factors that the brands placed the highest. This was followed by recyclable packaging, cruelty free products, timeless and seasonless products and long-lasting garments. Students also placed high personalised customer service whereas educators highlighted artisanal products.

Between 70% – 75% students and lecturers think that typical customers of small fashion brands in V4 are most concerned about supporting local businesses, recycling and plastic use and pollution.

Amongst perceived barriers in changing average customer behaviour towards a more sustainable approach were:

- higher price of sustainable products
- lack of education and interest vs. availability of fast fashion at low prices
- confusion about sustainable claims
- customers not understanding the design/value/price ratio.

4.3. Business practice of small fashion brands in V4

4.3.1. Sustainability and business practice

We asked brands what elements they already apply in terms of sustainable fashion business practice. We also asked schools and universities what they think small fashion brands already do that is sustainable. We categorised relevant activities under 4 themes: social, environmental, economic and cultural. Table 1 outlines the most frequent responses.

4.3.2. Marketing and communication

In a brand specific section, we asked whether their communication currently puts emphasis on any aspects of sustainability and if so, to specify which. The most frequent answer was:

- communicating local production
- explaining customers benefits of buying local & supporting the local economy.

Impact category	Small brands	Responses %	Universities & schools	Responses %
Social	Manufacture locally	100	Manufacture locally	69
	Communicate to their customers about key brand-relevant issues	60	Communicate to customers about key brand-relevant issues driving the sustainable agenda	53
Environ-mental	Manufacture locally	100	Use recyclable materials	78
	Pay attention to selection of fabrics and components that have the least environmental impact	90	Manufacture locally	73
	Use recyclable materials	70	Using eco-friendly certified fabrics and/or components	60
	Use eco-friendly certified fabrics and/or components	60	Using recyclable packaging	58
	Use recyclable packaging	50	Pay attention to selection of fabrics and components that have the least environmental impact	56
	-	-	Using zero-waste pattern making techniques	56
Economic	Pay fair price to suppliers	80	Up-cycling existing garments/com-ponents	67
	Have and nurture long-standing relationships with their suppliers.	80	Pay fair price to suppliers*	56
	Up-cycle existing garments/com-ponents	60	Use deadstock materials to econo-mise	51
	Use deadstock material	50	-	-
Cultural	Educate their customers about ben-efits of purchasing high quality, long lasting products and their real value	90	Educate customers about benefits of purchasing high quality, long lasting products and their real value.	80
	Educate customers about benefits of consuming	80	Educate media about sustainable issues in the fashion industry.	64
	Collaborate with artisans and/or preserve local heritage techniques	70	Educate customers about the bene-fits of consuming less.	62
	Educate media about sustainable issues in the fashion industry	60	Collaborate with artisans and/or preserving local heritage techniques	58
	Have developed transparent relation-ships with suppliers	60		

*Interestingly, respondents from the professor/lecture group did not express in volume that they think local fashion brands pay fair price to their suppliers. This was in contrast to responses from fashion brands and students. The educators put up-cycling existing garments/components, use of deadstock materials, long-standing relationships with my suppliers and an on-demand direct to consumer business model with on-demand production over local fashion brands paying fair price to their suppliers.

This was followed by:

- products' longer life cycle through timeless
- high-quality designs
- educating about reasons of consuming less
- explaining higher price/clearer price breakdown.

Other areas were noted only individually, e. g. ethically made, bio & eco products, why it makes sense to use sustainable materials, slow living movement, vintage through heritage and artisanal crafts and working conditions and humanity.

We also asked brands where they currently present their work and how effective these platforms are. Most frequent answers were social media (Facebook, Instagram, Alpaka – Slow Fashion App) and a website.

Brands perceive social media good for brand visibility and they use the basic metrics to measure communications impact. Through websites they measure conversions and track sales as well as have space to communicate about sustainable principles to their customers. Some brands also promote their work through lectures on slow fashion/fashion workshops. These allow space to explain why slow fashion is important. Many present their work at either local fashion markets or local fashion events such as Kosice Fashion Week, Bratislava Fashion Days. According to some, fashion markets provide personal contact with both existing and potential customers and are enough to generate new orders. Participation at fashion events serves mainly for the presentation of collections, provides space in the media, and offers pop-ups where the garments are directly sold. Others use their showroom or sell through local stores such as Nila. Several brands admitted that they don't have accurate information about effectiveness of communication channels and brands.

4.4. Local influence on sustainability in fashion

Small fashion brands

We asked brands in what area they think their brand can have the most influence over sustainability in fashion. The most often mentioned answers were:

- transparent and long-term relationships with production partners (70% respondents)
- selecting only materials with the least impact on pollution and energy both (70%)
- own operations: marketing and communications – educating customers and media (60%), own operations: recycling textile waste (50%)
- own operations: upcycling materials (40%).

Schools and universities

We asked in what areas can respondents personally have the most likely influence on sustainability in fashion:

- recycling textile waste scored the highest (60%)
- end of use recycling (56%)
- educating the general public (56%). Respondents also focused on operations, specifically
- operations: zero waste patterns (53%)
- operations: upcycling materials (53%)
- operations: selecting only materials with the least impact on pollution and energy (48%)
- educating students (47% educators).

5. Sustainable education and future support

Small fashion brands

Brands most often get information about sustainability from online courses and seminars, their former universities and peers. This is complemented by books, magazines and fashion sector specific websites (BoF, Vogue Business, EcoTextile News) and social media. Some are active members of movements such as Fashion Revolution and some are participating at various incubators and accelerators (United Fashion Incubator, Belgium and EU Fashion Tech Accelerator COSH).

Brands would like to access the following resources and support in the future to further develop their brands' sustainability credentials:

- supportive platforms (similar to United Fashion, but for V4)
- support from the state or other sector specific business support organisations
- research funding for textile and institute of eco textile
- suppliers/manufacturers of ecological and ethical materials
- agents to connect with stores
- partnering with aligned brand partners to further develop and grow the brand
- greater media support
- more mature and solvent clients who appreciate buying local products.

Schools and universities

Students most often get information about sustainability from their university/school and social media. This is followed by various publications accessible both online and offline. Students also highlighted observation of other brands as an important aspect of educating themselves about sustainability alongside their peers.

Topics and format students the most enjoy at their schools were:

- materials and techniques (characteristics, environmental impact, suppliers)
- production (examples of factory standards and their application of lack of sustainable principles, methods & principles of dyeing, recycling, eco-printing, zero waste cuts)
- discussion about trajectory of travel in fashion industry in relation to sustainability (learning and discussing how we can personally make impact, how important the sustainability in fashion industry is and levels of application and implication within the industry value chain)
- watching and discussing documentaries

Number of students also noted that sustainability was partially touched upon at almost every course at their university but there was not a specific course that solely focused on sustainability and its many aspects.

Students would like to be able to access the following resources in the future to further develop their practice and knowledge of sustainability:

- platform that gathers fashion designer, fabric makers
- financial support for university for new technologies
- access to more sustainable materials working with quality materials
- connections to suppliers

Students and educators identified the following barriers to sustainable fashion education:

- old ways of teaching and some lecturers not informed about latest developments
- no funding for new technologies, sustainable materials, workshops, industry specialist lectures thus lack of continuity
- insufficient interest in the topic from both students and academics

"The overall university system is a slow moving one – this means often sustainability is already a part of many courses, but you don't find it declared anywhere in the official course or discipline description. At my Academy we started giving lectures and courses in sustainability in textiles and fashion several years ago, as the younger generation of lecturers worked within the industry and got personally involved and interested in sustainability."

Lecturer

"In some institutions, either due to age or a missing industry working experience, there is no one from the in-house staff to teach on issues of sustainability. But there is a huge demand from students to cover these issues even at my university. We are seeking lecturers from outside to cover more specific issues of textile and fashion production such as evaluation, supply chain, production management. And here, the biggest problem is financing. Our state-given budget doesn't cover costs – as inviting an external lecturer. So we have to work really hard to find some ways of financing these activities... Continuity becomes a big problem then.."

Lecturer

"The school is trying as hard as possible but without funding, it's problematic."

Student

"Fashion education is still dependent on dated ideas of fashion as a form of art or expression of individuals. Fashion design education should be considered as a way of changing the perception of what fashion means, how we dress, how we consume or how we produce clothing."

Lecturer

6. Conclusion and recommendations

6.1. Summary of key findings and recommendations

The growing interest in sustainability from the younger generation is supported by their personal values. Fashion students think that sustainability should be part of brands' value proposition and business operations. Surveyed fashion brands in the V4 region most often apply sustainable principles in their operations and brand proposition by producing locally; working with local suppliers; choosing locally available high-quality materials; making long-lasting products; collaborating with artisans; communicating with and educating customers about the benefits of purchasing high quality, long lasting products and their real value; as well as about why to consume less.

Respondents most frequently cited that they have the most influence over development of transparent and long-term relationships with production partners, selection of materials with the least impact on pollution and energy, educating customers and media, and upcycling materials.

However, from customers' perspective, there are several barriers to sustainability identified by both small brands and students & educators. These are high prices of sustainable fashion; influence of fast fashion; lack of customers' understanding of value and price of high-quality design and sustainable products; and customers' confusion over sustainability claims. Both respondent groups see greenwashing as an issue in credibly applying sustainability principles.

Finally, although there is a growing interest and demand from the younger generation of students in sustainability there are several key barriers to sustainable fashion education such as lack of funding for new technologies, sustainable materials, workshops, industry specialist lectures as well as gaps in real industry sustainability experience of some educators.

RECOMMENDATIONS:

Following on from this report it is recommended to continue engaging with respondents who agreed to be further contacted to develop individual themes into greater detail and collaborate in providing solutions for the future.

Below are some of the possible solutions for the future:

- Further focused study with an aim to develop a fashion sustainability strategy for V4 young fashion brands, building on the current study, drilling down on identified issues expanding the respondent sample.
- Specialist sustainable platform with resources for young fashion brands and designers covering education, sustainability business support, sustainable suppliers, etc.
- Sustainability focused seminars and lectures.
- Specific fashion sustainability collaboration platform for educators in V4 to pool resources and exchange knowledge and good practice.
- Development or adaptation of a sustainability assessment tool for young fashion brands in V4

6.2. Sustainability checklist

Below is a set of questions that can help fashion design students and young brands to think holistically about application of sustainable principles in their practice.

1. How your existing personal values relate to sustainable principles?
2. How your brand values relate to sustainable principles?
3. Do you know what your customers value the most in terms of sustainability?
4. Do you know what your customers are the most concerned about when it comes to issues related to sustainability?
5. What do you think are the barriers in changing your customers' behaviour towards a more sustainable approach and buying sustainable products?
6. When thinking about sustainability and your brand; what do you already do that has SOCIAL, ENVIRONMENTAL, ECONOMIC AND CULTURAL IMPACT? What could you do more of?

Table 2 below is designed to help you think more about each impact category.

IMPACT	EXAMPLES OF ACTIONS
SOCIAL	<p>Business policies to prevent poverty in your supply chain.</p> <p>Business policies to promote fair pay in your supply chain.</p> <p>Engaging only with fair trade suppliers.</p> <p>Supporting disadvantaged communities or a charitable cause with part of your profits/sales.</p> <p>Manufacturing locally.</p> <p>Communicating to your customers about key brand-relevant issues driving the sustainable agenda.</p>
ENVIRONMENTAL	<p>Using fabric dyes that have the least impact on the environment.</p> <p>Paying attention to selection of fabrics and components that have the least environmental impact.</p> <p>Using eco-friendly certified fabrics and/or components.</p> <p>Using recyclable materials.</p> <p>Using zero-waste pattern making techniques.</p> <p>Using recyclable packaging.</p> <p>Policies relevant to climate change (shipping, location of supply chain, waste management).</p>
ECONOMIC	<p>Direct to consumer business model with on demand manufacturing.</p> <p>Digitalisation to connect and work with suppliers.</p> <p>Circular business model.</p> <p>Up-cycling existing garments/components.</p> <p>Using deadstock materials.</p> <p>Sharing/pooling resources with other brands or suppliers.</p> <p>Doing due diligence checks on my suppliers and trading only with those who pass our criteria for sustainable suppliers.</p> <p>Having and nurturing long-standing relationships with my suppliers.</p> <p>Paying fair price to my suppliers.</p>
CULTURAL	<p>Educating customers about the benefits of consuming less.</p> <p>Educating customers about the benefits of purchasing high quality, long lasting products and their real value.</p> <p>Educating media about sustainable issues in the fashion industry.</p> <p>Myths and greenwashing busting through providing customers relevant facts.</p> <p>Developing transparent relationships with suppliers.</p> <p>Knowledge sharing in the value chain.</p> <p>Collaborating with artisans and/or preserving local heritage techniques.</p>

1. Where do you think your brand can likely have the most influence over sustainability issues impacting the fashion industry? Think about the entire supply chain from the farmer, yarn, textile and garment production, your own operations, customers and product end of life stage.
2. How and where do you communicate what you do in terms of sustainability to your customers? Does it work, do you measure the impact of your communications?
3. How do you want to further educate yourself about sustainability? Who can you connect with?
4. How are you going to measure the progress you made on your and your brand's sustainable journey?

6.3. Final remarks

Despite outlined challenges there is drive and desire from both respondent groups for greater engagement and development in the fields of sustainability. We would like to conclude this report with several selected respondents' quotes.

"We think that one of the key problems regarding sustainability is the short life of products – not materially, but because of the lack of emotional investment from the user. If it is not wanted, the product (and all the energy and resources that were necessary to make it) ends up in a landfill."

Designer/owner of a small fashion brand

"V4 is missing infrastructure and connection with agents, buyers, stores".

Designer/owner of a small fashion brand

"Our recommendation and desire is to communicate more together. Together, we can create a recalibration of our values– shifting to a world that cares about heritage, values materiality and knows the power of their choices."

Designer/owner of a small fashion brand

"It's great to see that sustainability is an important topic for a lot of people nowadays but I feel like the whole thing in the fashion world is mostly just greenwashing. Then of course there's a lot of small business that are true and trying their best but without acceptance of the minority and help from the government the good work of these small businesses will stay within their small bubbles with a few customers."

Student

"I would be pleased if there could be a sharing V4-network of educators or other interest groups/subjects in giving lectures on different issues of sustainability in fashion and textiles – either inhouse (at university/academia) or online lectures, workshops, etc."

Lecturer

"As there is not much of textiles or fashion production left in V4 I really think it would be meaningful to get together and share the resources and information – as it is the one important way of supporting local production and keeping it alive for the future."

Lecturer



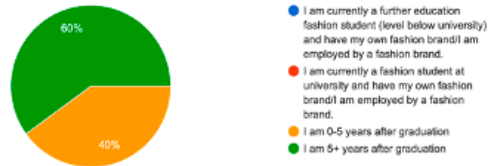
7. Appendices

7.1. Appendix 1 – Summary of respondents

Small fashion brands

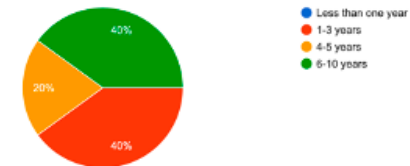
1 Student/graduate/seasoned professional?

10 responses



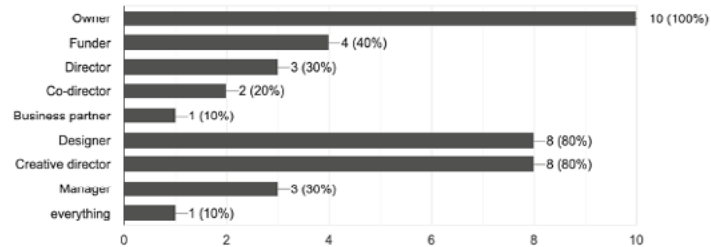
2 How long has your fashion business/brand been in operation?

10 responses



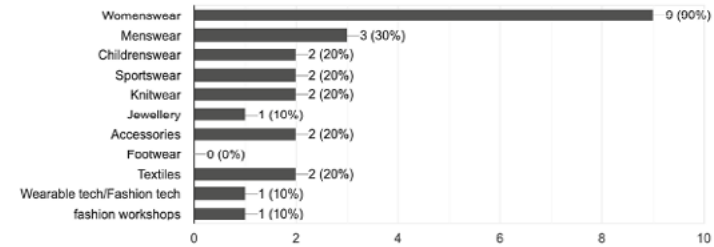
3 What is your role in the business?

10 responses



4 In which sector(s) of fashion does your business operate?

10 responses



Education – further education institutions and universities

1 Student/teacher/lecturer/professor/education professional?

45 responses



7.2. Appendix 2 – Template questionnaire for small fashion brands

Refer to the link

https://drive.google.com/file/d/1rmpeUjUo1q44JfxhZnSw3qLF_qxvI3M7/view?usp=sharing

7.3. Appendix 3 – Template questionnaire for universities and schools

Refer to the link

https://drive.google.com/file/d/1clxAyM9xu0_PD-m6svnPHkm07UvbYZtA/view?usp=sharing

7.4. Appendix 4 – About author

Zuzana Mandic is a business consultant. She works with individual fashion designers and brands to develop and optimise their business strategies and embed sustainable principles.

She also collaborates with public sector organisations, government agencies, professional bodies and education providers from creative industries to meet their specific research & analysis, policy, organisational and project goals.

She has over 15 years' experience in professional services and public sector. She gained her experience at the British Learning and Skills Council, under the Ministry of Education, where she focused on funding portfolio and project management (including European Social Fund) as well as partnership development with employers, sectoral representatives, regional development agencies and education institutions. In the private sector, she worked, for example, in the British consulting firm VP Consulting and the advertising agency Leo Burnett. A Henley Business School alumna, she also holds a postgraduate professional qualification in marketing from the Chartered Institute of Marketing, UK.

Zuzana developed and co-authored a market study '[*Potential of the Czech Fashion Sector*](#)' (Arts Institute/Ministry of Culture, 2018).



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