



**WHEN CARING FOR
PEOPLE & THE PLANET MEANS PROFIT**



How sustainability makes good business sense

By Jackie Lewis, Katinka Van Beveren, Emily Robertson-Hood and Catherine Cole.

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Contributors



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For 20+ years Emily has led teams of Engineers, QA, Pattern-makers, Graders, and Technical Developers in the fit, construction and global manufacturing of apparel products ranging from denim to down. She has led teams at Levi Strauss & Co., Lands' End, and Eddie Bauer.



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Business Development Specialist,
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Since joining Alvanon in 2012 she has worked with and advised on every global business model and developed a particular understanding of the business and product challenges her European clients face on a daily basis. As a business development specialist she helps companies grow.

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Foreword

Doing the right thing in business is no longer synonymous with philanthropy. Sustainable business strategies are now essential for anyone looking to future-proof their businesses. It now means investing in your people, future talent, environmental impact, and long-term business priorities. In this new age of corporate governance, issues like people & training, transparency, privacy, community engagement and process efficiency are becoming second nature in daily business discussions. New stakes are emerging around what it means to be a sustainable company and what components need to come together to make apparel both competitive and sustainable. This paper initially presents an overview of emerging sustainable business strategies; then looks at the broader impact sustainable business strategies can have on a business with social purpose at its core; it then explains how knowledge, education and perseverance will inform the right choices, driving a step change and future proofing the fashion industry.

JANICE WANG
CEO, Alvanon



The New Era of Corporate Responsibility

By Jackie Lewis

A new era of sustainability is upon us, based on a growing awareness of our personal wellbeing and the impacts of pollution on our planet. The digital landscape facilitates constant and instant access to information (fact and fiction), empowering consumers to demand more transparency; which in turn informs choice and opinion like never before.

Sustainability has become the challenge of our time; evoking passion and confusion in equal measure. We struggle to define sustainability challenges and what we can do to address it.

At the centre, we see the corporate brands and retailers who are accused of reaping the benefits of globalisation over recent decades. The corporates are perceived as the bad boys, cited as responsible for mass consumerism, price deflation and chasing profit, at the cost of sustainability or ethical best practice. Is this a justifiable accusation? What are the hard facts behind the hype? What role can business play to deliver against the wider sustainability agenda? To answer these questions, we need the facts, so we can understand the truth and find solutions.

Sensationalised press reports and statistics relating to sustainability grab attention, and gather support, but also make it difficult for even the most informed audience to understand what is true, and what they should do in response.

The most famous example is the often-cited claim (which has since been debunked) that: “Fashion is the second most polluting industry”. This theory, which seems to have been reported by Deloitte as early as 2013 seemed quite feasible to me, since textile, apparel and footwear manufacturing is dependent on high consumption levels of water, energy and chemicals, alongside a poor carbon footprint and waste to landfill performance.

The growing global population may have played a significant role in fashion’s rising impact. With clothing being a basic need for human beings, defined by Maslow as: “a physical requirement for survival,” intrinsic to the pursuit of safety, belongingness, esteem and self-actualisation. As the global population doubled over the past 50 years, now reaching 7.7bn globally and estimated to increase to 8.5bn by 2030, so too has our need for clothing. So is this claim that fashion is the second most polluting industry being driven by the rising global population?

DON'T BUY THIS JACKET



The 2018 report 'Measuring Fashion' published by sustainability consultancy Quantis opens with the following statement:

“THE ROLE OF THE GLOBAL APPAREL AND FOOTWEAR INDUSTRIES HAS SHIFTED FAR BEYOND MEETING A BASIC HUMAN NEED. THE RELATIONSHIP WITH FASHION IN OUR MODERN LIVES HAS HAD A COLLATERAL AND SIGNIFICANT IMPACT ON OUR PLANET’S RESOURCES.

AS WE FACE URGENT ENVIRONMENTAL AND SOCIAL CHALLENGES CAUSED BY CLIMATE CHANGE AND RESOURCE DEPLETION, THE EFFICACY OF SOLUTIONS WILL DEPEND ON THE CREATIVITY, INNOVATION AND BOLDNESS SO CHARACTERISTIC OF THE FASHION INDUSTRY. IT’S TIME FOR PLAYERS TO CHANGE THE TRAJECTORY.”

It's Black Friday, the day in the year retail turns from red to black and starts to make real money. But Black Friday, and the culture of consumption it reflects, puts the economy of natural systems that support all life firmly in the red. We're now using the resources of one-and-a-half planets on our one and only planet.

Because Patagonia wants to be in business for a good long time—and leave a world inhabitable for our kids—we want to do the opposite of every other business today. We ask you to buy less and to reflect before you spend a dime on this jacket or anything else.

Environmental bankruptcy, as with corporate bankruptcy, can happen very slowly, then all of a sudden. This is what we face unless we slow down, then reverse the damage. We're running short on fresh water, topsoil, fisheries, wetlands – all our planet's natural systems and resources that support business, and life, including our own.

The environmental cost of everything we make is astonishing. Consider the R2® Jacket shown, one of our best sellers. To make it required 135 liters of

COMMON THREADS INITIATIVE

REDUCE

WE make useful gear that lasts a long time
YOU don't buy what you don't need

REPAIR

WE help you repair your Patagonia gear
YOU pledge to fix what's broken

REUSE

WE help find a home for Patagonia gear
you no longer need
YOU sell or pass it on*

RECYCLE

WE will take back your Patagonia gear
that is worn out
YOU pledge to keep your stuff out of
the landfill and incinerator



REIMAGINE

TOGETHER we reimagine a world where we take
only what nature can replace

water, enough to meet the daily needs (three glasses a day) of 45 people. Its journey from its origin as 60% recycled polyester to our Reno warehouse generated nearly 20 pounds of carbon dioxide, 24 times the weight of the finished product. This jacket left behind, on its way to Reno, two-thirds its weight in waste.

And this is a 60% recycled polyester jacket, knit and sewn to a high standard; it is exceptionally durable, so you won't have to replace it as often. And when it comes to the end of its useful life we'll take it back to recycle into a product of equal value. But, as is true of all the things we can make and you can buy, this jacket comes with an environmental cost higher than its price.

There is much to be done and plenty for us all to do. Don't buy what you don't need. Think twice before you buy anything. Go to patagonia.com/CommonThreads or scan the QR code below. Take the Common Threads Initiative pledge, and join us in the fifth "R," to reimagine a world where we take only what nature can replace.

patagonia
patagonia.com



TAKE THE PLEDGE

*If you sell your used Patagonia product on eBay® and take the Common Threads Initiative pledge, we will co-list your product on patagonia.com for no additional charge.



But the root cause isn't simply population growth. Statistics show demand for clothing is increasing by 4.73% annually, outperforming population growth which is tracking at approximately 1%. The apparel and footwear industry is now worth US\$1.7trn and set to grow by an estimated 63% by 2030. This means we must focus on managing overproduction, consumption and waste, in addition to driving more sustainable choices in materials and manufacturing if we are to manage the impact on people and our planet. The Textile Exchange (Pepper and Masterson, 2017) provides comprehensive guidance for the industry on which fibres and materials are considered low impact and as such preferred (PFM).

The original question remains a difficult one to answer, but with dependency on dyes, production, chemicals and leather, the reality is that we are probably sitting somewhere between number four and eight on the scale - with the most polluting industries in the world still associated with mining, lead smelting and mineral extraction (Sen Nag, 2018).

This is not a comfortable place to be, and by no means can we be complacent even if this accusation is unfounded or exaggerated, our performance is still poor against a backdrop of growing overconsumption.

FACT: The apparel industry doesn't perform well in terms of its sustainability score (as defined by the Higg Index) and is still described as weak, with a score of 38 out of 100. The Global Fashion Agenda's Pulse of Fashion Industry reports progress in 2018 (Thomas et al., 2018), with the sustainability score improving by six points, from 32 to 38. Progress was attributed almost entirely to small and medium companies in the mid-price segment. This is described as encouraging, given this group accounts for half of the industry by revenue.

The news was not all positive, however, with low-performing companies in the entry-price segment lagging significantly behind, making little to no progress since last year. Giant companies and luxury companies are still leading the way, but finding solutions for the unresolved problems is becoming tougher, with impact and returns receding. The results indicate the changing shape of our industry

and the different challenges faced by business models at opposite ends of the scale. For the giants and luxury players who are committed to sustainability, mobilising change through the entire supply chain takes time, tenacity and innovative thinking with huge costs involved in getting it wrong, especially if end-to-end processes solutions are not coordinated.

Taking a closer look at the changing shape of the UK fashion market might explain the challenges faced by smaller businesses worldwide. Although the UK big players (Burberry, Next, M&S and ASOS) continue to dominate the UK market, it's the emergence of small pure-play e-tailers like Boohoo, Missguided and Pretty Little Thing, who have really disrupted the retail landscape since 2012. The fast fashion e-tailers are reported to be growing at a rate 24 times faster than bricks-and-mortar retailers. They are now facing the challenge of how to deliver sustainability, alongside speed-to-market and competitive pricing. Is this achievable, especially when their business models are based on light-touch product development and sourcing strategies?

Where should we concentrate our focus to drive a real-step change in performance over the next five years? Do we continue to push the giants to move faster? Do we encourage and accelerate change within the small-to-mid size companies (with 50% of the industry revenue) who are taking steps to improve their business practices? Or, is the answer to target the newcomers and support them with the basics in delivering speed sustainably?

We could assume that speed to market (the fast fashion model) exists as an inhibitor to progress, but what about other factors such as price deflation and consumer awareness?



The Impact of Price Deflation

To consider price deflation, let's look at the pricing of a basic T-shirt over the past 60 years, which might help us to understand the impact of pricing on consumer purchasing behaviour and ultimately the trend towards overconsumption.

Forbes (Sharf, 2013) finds that in 1955, a simple T-shirt cost on average 79 cents, which is the equivalent of US\$6.87 today. In the 1970s, the same garment cost between US\$1.49 - 2.00 (equivalent to US\$8.95-12.01 today). By the 1990s, however, prices had deflated by approximately 60-70% to US\$3.10, due to offshoring of production and mass production, a trend which has continued.

Today we accept that a T-shirt can cost less than a cup of coffee. But how can we reverse this trend when we have given consumers the freedom to buy much more than they need?

The fast fashion model is now reversing this trend with a return to sourcing product closer to home and decreasing average order quantities. Surely this should be a trend that we all embrace and celebrate, however there remains an elephant in the room, which is now consumer led – PRICE. How do we reverse the trend in price deflation to support sustainable sourcing closer to home and speed?

All these factors impact our ability to operate sustainably, but ultimately the price the consumer is willing to pay is the underlying barrier (Deloitte, 2018).

With increasing awareness from the consumer, we now have an opportunity to deliver transparency on another level; educating the audience on what is the right price to pay. This would be a brave move for most retailers and brands as it could involve disclosure of their profit margins, but alongside publishing your supplier lists, reporting on modern slavery and supply chain mapping, why not allow the consumer to ask: "What price was paid for that T-shirt?". This approach might sound naive, but as the consumer becomes more engaged in the sustainability journey, it's likely to be the next challenge that business leaders face. Direct-to-consumer brands are already experimenting with these kinds of strategies, with Everlane disclosing how much each aspect of production costs for the items it sells.



How Can We Improve?

more brands committing to roll out of the Higg tools full-scale. Only then can we together achieve comparability across the industry, which in turn is the key to empowering choices through transparency." (Rosas, 2018).

Considering the importance of consumer awareness again, let's look at the Modern Slavery act, which came into force in 2015. It requires all UK businesses (with a global revenue of more than £36m), to publish a statement outlining the steps taken in the previous financial year to combat the risk of slavery within their businesses and supply chain. This information is now in the public domain and easily accessible, facilitating consumer awareness around this important issue.

A suite of Higg Index tools including the Higg Brand & Retail Module (Higg BRM, 2018) have also been developed for brands allowing businesses to evaluate their own internal processes from concept to consumer. Maybe, we can all look forward to a future where all brands and manufacturers of scale, sign up to this programme allowing further transparency. Why not make it compulsory for all UK businesses with a turnover of £36m and above to sign up to the SAC Higg Index as well?

So, what do we know about best practice, how do we share and encourage alignment in a market driven by competitive edge and profit? Surely there are guide rules and frameworks that we should follow as a baseline for sustainability that allow differentiation but delivers the goal of lifting our Pulse score from an embarrassing 38, to something that resembles acceptable at 70+ (strong) over the next decade.

The Sustainable Apparel Coalition (SAC) is the apparel, footwear, and textile industry's leading alliance for sustainable production. Created in 2009, when Walmart, America's biggest retailer, and Patagonia, one of the world's most progressive brands, came together with a radical mission: collect peers and competitors from across the apparel, footwear and textile sector and together, develop a universal approach to measuring sustainability performance.

Launched in 2012, the Higg Index was developed by the SAC and now exists to provide a transparent and holistic overview of both environmental and social performance within the supply chain. Leading brands, manufacturers, associations and NGOs, with a combined revenue of over US\$500bn are now among its membership base.

SAC brand member, H&M Group's head of sustainability Anna Gedda recently said: *"We were the first brand to roll out Higg FEM (Facility Environmental Module) to 100% of our tier 1 and strategic tier 2 suppliers. We now look forward to*



Defining a Sustainable Business Model

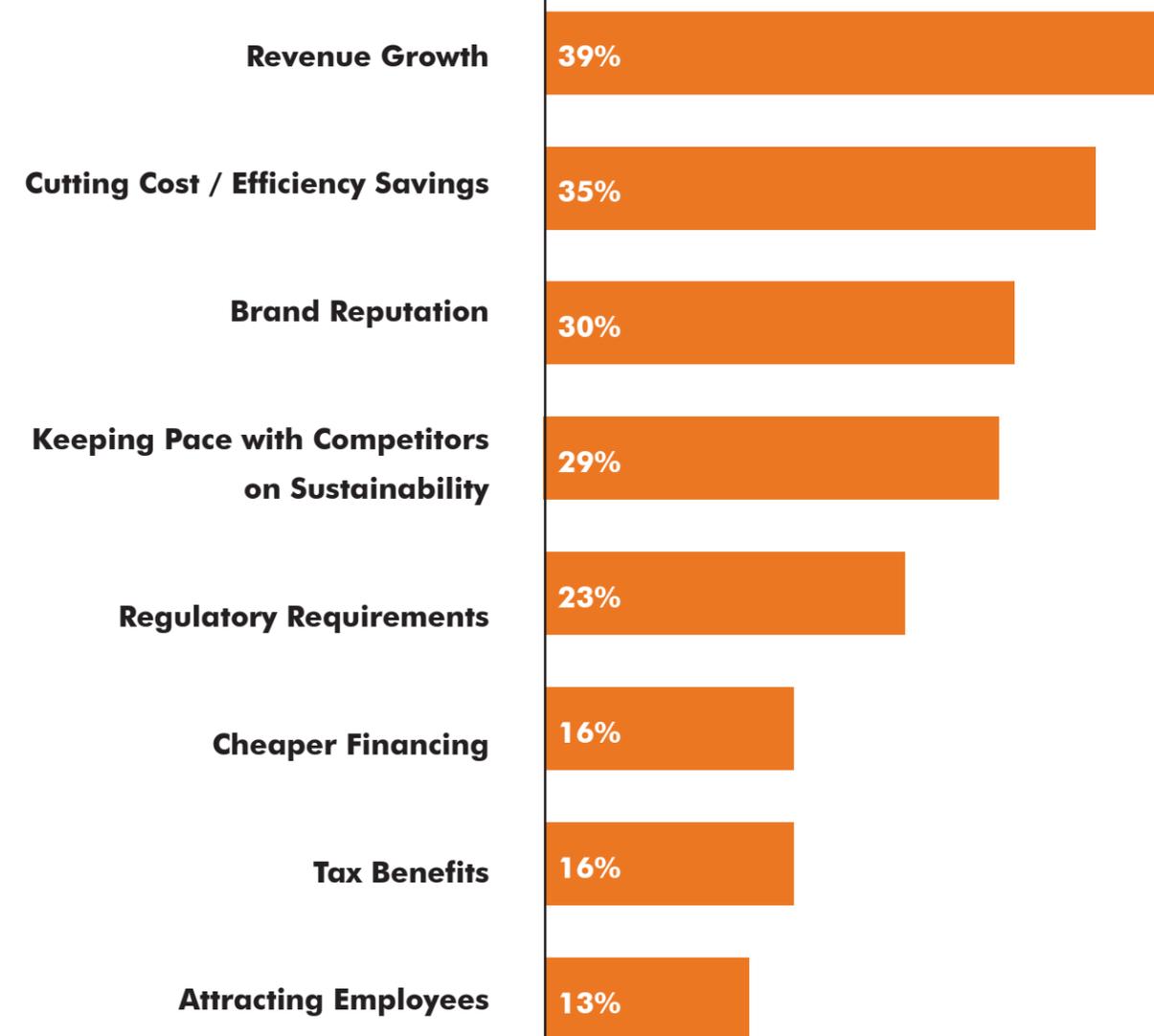
But regulatory requirements alone won't motivate change on the scale we need or ensure continuity. What are the key motivations for change, that will capture the minds of business leaders and how can we deliver the most impact? Perhaps we are already at a tipping point where we could soon see sustainability embedded in every business strategy as the norm rather than the exception to the rule. Slowly business is starting to grasp the concept of sustainability being not only the right thing to do, but also making sound business sense.

So how will corporate social responsibility shape up in 2019? How do businesses need to change, to keep pace and evolve in a market which demands speed, newness and competitive pricing, yet also expects us to safeguard its people and the planet?

Let's explore factors that are driving business to act, you might be surprised by the answer. According to a report commissioned by ING 'From Sustainability to Business Value Finance' (ING, 2018), the top three reasons for implementing sustainability targets in business today are driven by a desire to grow revenue (39%), reduce costs (35%) and/or protect their brand (30%), not a requirement to comply with regulations. Business now appreciate the importance of keeping pace with competitors on sustainability as consumers begin to drive the agenda.

FACTORS DRIVING COMPANIES TO TAKE ACTION ON SUSTAINABILITY

Which of the following factors have been most important in driving your company to take action on sustainability?



Source: ING Sustainability and Finance Study 2018.



Taking the first two factors, *growing revenue and driving efficiency*, made me reflect on my own personal experiences in the fashion industry, shaped by managing product development and technical teams in both retail and manufacturing for over 25 years. Constantly targeted with improving business process, driving efficiencies and reducing costs, at times I became disillusioned with my role as a business leader. Measuring success against targets such as sample hit rate, lead time, buying in margin and returns, in a drive to deliver sales, market share and profit margins, I found myself asking “Why?”. What was our purpose and were we really adding value to the industry and focusing on the people employed in it?

Just to demonstrate the point further I’ll share some examples of achievements and changes which I’ve experienced along the way:

1 Digitisation of the colour approval process in the early 1990s, by moving away from physical samples. This reduced physical lab dips by 80% and associated costs by 60%, allowing the business to react quickly in season to trends and be more competitive.

2 Merged two large UK home shopping businesses in the mid-to-late 1990s and aligned product development and approval processes, including migration of the pre-production sealing process to our off-shore team. Reduced operating costs by 30%, while managing 40% more options, again delivering more choice to the consumer at pace.

3 Implemented clear Good, Better, Best standards for product engineering with a leading EU value retailer, which improved buying-in margin while maintaining quality, (driving a £2.5m saving on top-selling styles).

4 Delivered the prestigious Alvanon ‘Fit certification’ in September 2015, the first EU value retailer to achieve this award. Implemented fit strategies, standards and processes to improve product consistency and customer experience, while delivering ‘fit certification’, through development of block patterns, consistent grading and implementation of fit standards (fit forms) throughout the organisation and supply chain. We took this all the way to the customer, leading to better size communication online, which drove increased online sales.

All of these are typical achievements you would expect a leader within the business world to deliver, efficiency supported by lean processes and Six Sigma methodology. I then asked myself what was missing, when the root cause was clear, the approach was customer-centric, and our results exceeded expectations. What drove me to ask “Why?”, the answer for me was the definition of these achievements, badged as ‘efficient’. Do we want to be remembered as overachieving on efficiency or something greater?

Troubled by this dichotomy, I realised that, sustainability and efficiency are so closely linked, perhaps they are the same? My 30-year journey might have been defined very differently. Rather than describing myself as a *‘commercially focused technical professional with a proven track record of creating and developing strategies to improve product standards and company performance’* I could claim to be both a **commercially-focused** technical professional and a true **sustainability advocate**, who has made a difference to people and the environment whilst delivering efficiency and profit.

In considering whether sustainability and efficiency are one in the same, and accepting businesses are more accustomed to defining success measured by a set of financial roadmaps and KPI’s (sales, market share and profit), maybe the solution is to simply give corporate social responsibility more meaning and focus in today’s market by using financial revenue growth and efficiency as the hook.

Qualified by the ‘Sustainability is good business for fashion’ report published by Global Fashion Agenda (GFA) and Boston Consulting Group (BCG) in 2018 (Lehmann et al., 2018): *“Even without considering the positive impact on brand building and risk management, the business case for investing in sustainability is positive. Improving a fashion brand’s environmental and social performance does not lower its profitability. In fact, if companies implement and scale the activities showcased in the roadmap, they can expect a positive EBIT margin uplift of 1-2 percentage points by 2030 (compared to the 2015 baseline).”*

To move this conversation on, let’s assume we have delivered a compelling argument that sustainability is both positive for people the planet and profit. How do we then shape a sustainable business model? What are the pillars for success? Businesses need some practical advice on how to mobilise change, starting with how to build the basic foundations defined by industry minimum standards and expectations.



Pillar 1.

Your People & Training

We have already established that facts are important, and a lack of knowledge can drive mistrust and inhibit progress, but how does that play out in our industry today? The fashion industry is changing rapidly, propelled by the new era of digitisation. It faces a real people issue in that very few people now have the right skills to support sustainability initiatives on the ground. Where do we find the textile and production engineers and technical designers who can take a sustainable design concept forward and deliver it in a production or commercial environment? The race for cheaper prices, off-shoring and a move away from traditional technical education has resulted in a skills gap which is now impacting our ability to respond to the sustainability challenge.

Conceptually, businesses are starting to ask the right questions, designers are more informed about sustainability and aware that they hold the key. It's a well-known fact that 60-80% of the product impact on sustainability is made at development stage. However, without technical or production knowledge, our ability to deliver a sustainable commercial product is minimised, or negated.

So what skills does our industry need? In order to answer this question, apparel technology company Alvanon, in partnership with 13 global apparel organizations, surveyed fashion industry professionals on the skills gaps, learning and development needs within the apparel sector.

The global survey highlighted an unprecedented skills crisis in the fashion industry - with 62% of respondents stating they are struggling to fill skilled roles, creating a 'war for talent' across supply chain (Greenstein, T. (2018)). The 'State of Skills in the Apparel Industry' report (Alvanon, 2018) highlighted some very specific problems in relation to skills and training including; a general lack of technical skills, an inability to recruit the right people, limited access to materials that delivered the appropriate training at the right time.

The findings of the Alvanon, 'State of Skills in the Apparel Industry' 2018 report are supported by the recent future of work report published by McKinsey (Fleming et al., 2017), which identified the core skills required for the new digital era as creativity, innovation and self-development. A focus on real-time training will be required to ensure we can keep pace with the ever-changing landscape. See some of the key call outs below:

- Continue to learn, the world is rapidly evolving, and it's unlikely you can train in a discipline and do the same job for 40 years!
- The workplace is ever-changing, which creates an environment unpredictability but an opportunity for constant learning.
- Be able to deal with information, processing data is a key skill.
- You need to drive your own development.
- **Within 60% of occupations, 30% of the activities could be automated, so we must be able to work alongside automation and technology.**
- It will matter less about what you know; focus on creative thinking, analytical skills and interpersonal skills (connectivity and persuasion are going to be more important).
- People need to be able to challenge themselves and take risks – try new things.



TOP 2018: WORKPLACE LEARNING TRENDS

1 Soften the impact of automation.

All parties agree, the #1 priority for talent development in 2018 is training for soft skills.

2 Balance today's challenges with tomorrow's opportunities.

As the shelf life of skills shrinks, business leaders worry that talent developers are focused on training for today's skill demands, at the expense of preventing tomorrow's skill gaps.

3 The rise of digital is transforming talent development.

Talent developers are depending more on online learning solutions to meet the needs of an increasingly diverse, multi-generational workforce—and there's no turning back.

4 If employees can't find the time to learn, reduce the friction.

Meet them on platforms they're already using with messages that align to their on-the-job needs and professional aspirations.

5 Amplify your manager relationships.

Manager involvement is a critical ingredient to increase employee engagement with learning.

For businesses to be sustainable and sustained, it's imperative that we put people at the centre of all our decisions. How we treat our colleagues has a direct correlation with employee engagement, with employees commonly citing the importance of equal pay and opportunities, flexible working hours and diversity as baseline expectations. Such factors are now viewed as the minimum standard for any business deemed as a socially responsible employer. However, this approach is merely tactical. What sets aside the progressive, is an ability to truly recognise people as individuals, creating opportunities for career progression, continuous learning supported by the right tools to do the job. This is the right thing to do if you consider your people to be an asset and retaining talent is key to your organisation; but how does this help the bottom-line?

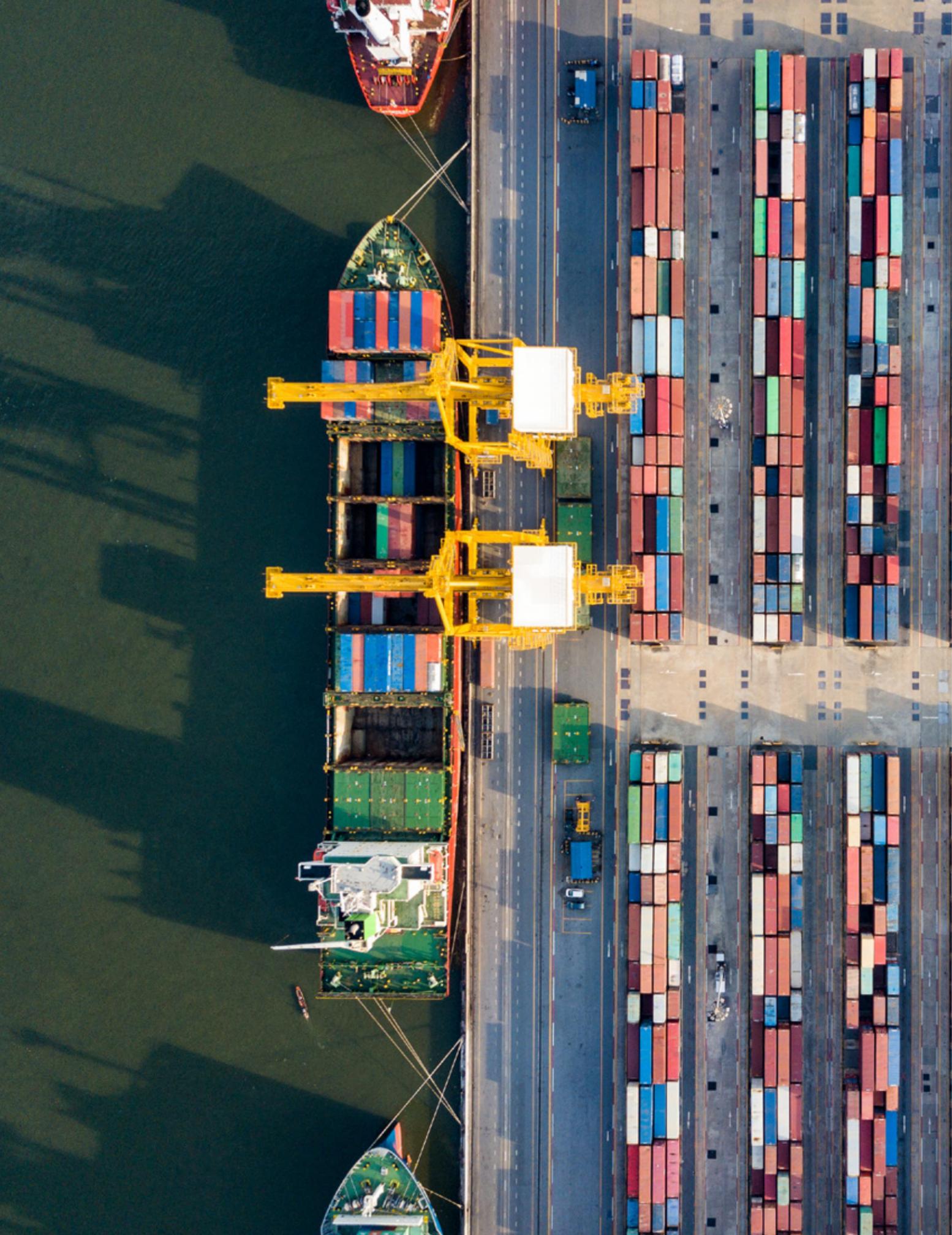
ANSWER: Providing people with the knowledge to function at their best, drives productivity; continuous learning drives engagement and innovative thinking. Ultimately this ensures retention and provides organisations with a competitive edge, sustaining a future for the individual and industry alike (Pin, 2017).

Another key consideration, is the simple fact that employees of today expect a career plan and if they don't get it, they are likely to look somewhere else for work. LinkedIn's 2018 Workforce Learning Report (LinkedIn Learning, 2018), states: *'A whopping 93% of employees would stay at a company longer if it invested in their careers. Development is no longer an optional perk or reserved for only certain positions. It's expected by today's talent. It signals that the employer values their people and are actively interested in their success — not just on the job, but over the long haul.'*

Retention of your people drives business continuity and negates cost. For example: most small business owners spend around 40% of their working hours on tasks which don't generate income, such as recruitment, with the average cost of recruitment; estimated at over US\$5,000 per role. Furthermore, the cost of a vacancy impacts bottom line profits by up to US\$500 per day.

CONCLUSION: As the old saying goes, people are your greatest asset, so nurture them.

Source: LinkedIn Learning Workplace Learning Report 2018



Pillar 2.

Transparency

What does this mean? We hear terms such as supply chain mapping and tier 1 and 2 suppliers, but why is this important? How do companies embarking on the sustainability journey achieve this level of visibility of their supply chains? Transparency is key to managing business risk associated with issues from child and slave labour to poor working conditions, low minimum wages, human health and safety issues, and environmental impacts. All of these potential issues can put companies at risk, both in terms of reputation and their bottom line. We are moving away from an era when merely disclosure of country of origin information in our garments was enough. Now, the expectation is increasingly for full disclosure of the supplier who manufactured the product. Brands such as People Tree, Studio Jux and Patagonia have built their business DNA around this concept, recognising the growing importance that consumers place on connecting with the supply chain and the people that work in our industry.

Here are a few simple principles which can facilitate an easier transition when embarking on this process:

- A harsh fact, but rationalisation of the supply base, helps speed up the process and facilitate transparency.
- Supplier onboarding decisions must be based on an ability to safeguard social corporate responsibility standards as well as delivering quality product at a price.
- Supplier partnership, collaboration and education are key for engagement.
- Technology implementation is instrumental to enable visibility and standardisation e.g. digitisation, and block-chain.

To bring the topic to life we can look at Patagonia, which has been a pioneer in this field; taking a very public commitment to ensuring every step of its supply chain focuses on ethical and environmental standards through its 'Footprint Chronicles'. This approach allows consumers to access where Patagonia sources its product, providing supplier details on location, product produced and dimensions of the workforce. Through its website it promotes and reports on key sustainability and corporate social responsibility issues including minimum vs. living wages, material sourcing and climate change.

At Patagonia, technology also supports transparency from product concept to commercialisation, with development now underway to create a cloud-based supplier portal for lifecycle management. In addition it is developing an app that will allow workers in supplier factories to snap real-time video and images of the conditions in their workplaces, both positive and negative.

As Patagonia sees it, suppliers aren't just another link in the chain, but are treated as strategic partners.

Patagonia also uses a "4-Fold" supplier onboarding process which considers four factors (sourcing, quality, social and environmental) in balance. New suppliers must be financially viable, capable of producing the product and meet Patagonia's strict third-party auditing evaluation before they commit to onboarding. In this way Patagonia ensures it safeguards the risk to people, environment and its business.

Privacy

Cybersecurity is fast becoming another facet demanding inclusion in corporate social responsibility policies. In today's world, privacy and a company's ability to secure personal data has become an essential component of successful business practice. Balancing consumer and employee expectations around connectivity, transparency and data rich insight alongside personal security and individual privacy is of paramount importance. The introduction of the European GDPR regulations in May 2018, was a move to modernise laws and further protect the personal information of individuals, enhancing their rights and control (Hern, 2018).

The need for enhanced regulatory enforcement is obvious and have been widely reported. Facebook for example (Shackelford, 2018) has been accused of allowing friend data to be accessed by Netflix and Amazon. Google, Amazon, and other companies producing smart phones are facing pressure to ensure consumer's private conversations and video footage doesn't fall into the wrong hands. What does this mean for business, who control or process personal data e.g. name, address, IP address and sensitive information such as sexual orientation?

- Companies covered by GDPR are accountable for their handling of people's personal information responsibly, ensuring data protection policies, data protection impact assessments and documentation on how data is processed are maintained (Burgess, 2019).
- Additionally, companies who apply "regular and systematic monitoring" of individuals at a large scale or process a lot of sensitive personal data must employ a data protection officer (DPO).

Ultimately, it's a matter of respecting individuals and their right to privacy. As Banksy famously stated:

“ I don't know why people are so keen to put the details of their private life in public, they forget that invisibility is a superpower. ”

The point is whether we choose to share information publicly, is at the discretion of the individual and not for others to misuse.



Pillar 4. Community Engagement



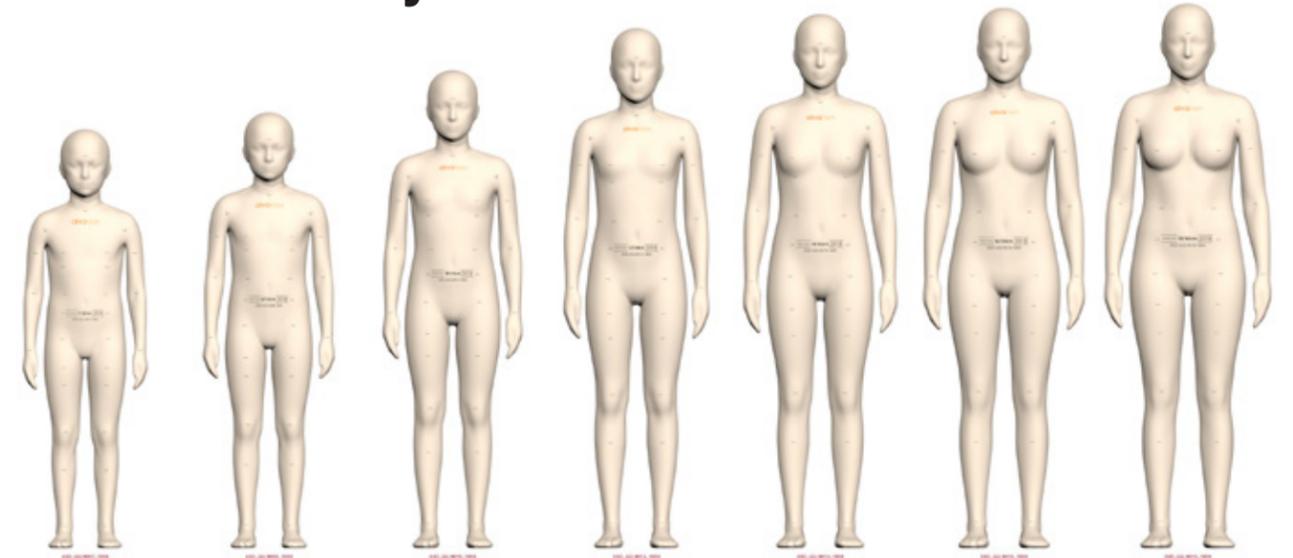
#imadeyourclothes Fashion Revolution

Reading Marks & Spencer's Plan A report (M&S Group PLC, 2018) recently and reflecting on the words of CEO, Steve Rowe, one phrase resonated with me; "re-defining the role of business in society." It was the word 'society' defined literally as "people living together" that made me think and consider the social and economic changes we have experienced over the past 50 years. Changes such as growth in urbanisation (projected to continue), an aging population, increasing ethnic diversity, automation, falling church attendance, multinational corporate power, the rise of smartphone use — these are all contributing to communities that feel disconnected and remote. But communities, individuals and business are now seeking ways to reconnect on a human rather than transactional level.

“ We believe there is an untapped need in society for businesses to do more than merely re-assure in a distant paternalistic way. We believe there is a desire amongst people for a very different approach to business. Trust is becoming one of the most important building blocks of a successful business. It is no longer enough for a company to hope or assume it is trusted, it must offer society a clear, measurable 'social dividend' to earn and retain people's trust. ” Steve Rowe CEO M&S

In a recent report from research firm Nielsen, 55% of consumers say they are willing to pay extra for products and services from companies that are committed to positive social and environmental impact (Nielsen, 2017). With community engagement featuring high as a factor in attracting and retaining talent. A recent poll of people aged 18-to-34 found they are more inclined to cite charitable contributions as an incentive to buy, and are more likely to want to work for a company that contributes to charity over one that doesn't (Preston, 2016).

Pillar 5. Process Efficiency



The potential for 3D is huge. Virtual AlvaForm Size Sets allow brands and retailers to develop and view their products on a full range without having to actually make them, eliminating huge amounts of waste each year.

Against a backdrop of new CSR challenges and the changing shape of our industry, businesses must maintain control of their core operations and product lifecycle processes, in the knowledge that the decisions we take at the design and development stage determine 60-80% of a product's environmental and social impact. This means implementing sustainable design strategies and supporting the use of low impact materials and manufacturing, distribution and end of product life (closed loop) programmes. Continuing to manage water, energy and chemicals, driving efficiency and reducing waste by embracing the opportunities in the digitisation of the value chain.

Digitisation presents a huge opportunity to change legacy design and product development processes, if we are all brave enough to take the step towards 3D virtual sample creation, development and approval. Only time will tell as to who will lead the way. The impact of this change cannot be underestimated, with approximately 50% of all developed samples never going into production and up to three samples required as part of a standard fit approval process, the figures speak for themselves. However, according to SAC, only a few pioneers have already taken the first steps towards a digital product lifecycle process:

Hugo Boss decided not to prepare physical samples for its 2018 pre-fall collections. Instead, all items appeared on large touch-screens presented in digital showrooms, thus eliminating the resources to produce samples and saving on transport costs (Wright, 2017).

Inditex has committed to train 100% of its designers on circular design principles by 2020 as part of the 2020 Circular Fashion System Commitment (The Fashion Law, 2018).

Nike has developed an app in collaboration with the London College of Fashion that seeks to enable designers to create more sustainable products based on the environmental impact of their material choices. The app called MAKING provides a user-friendly tool which ranks materials by four environmental impact areas that are water, chemistry, energy and waste (Making: Nike, 2013).



What Makes a Company Sustainable and Successful

People & training, transparency, privacy, community engagement and process efficiency are fundamental business strategies which help define and shape sustainable businesses of the future. Regardless of scale or target customer base, these principles will ensure longevity. This brings us full circle and emphasises the point that 'a sustainable business is good business' - after all, we all have a common goal, one which secures a future for the industry and the people employed in it.

In the words of Janice Wang CEO, Alvanon:

“Despite what some may think, profit can coexist well with social and environmental impact.”

As society becomes more aware of the social and environmental impact of products and services, the long-term winners will be those that evolve to put sustainability front and centre.

Our global corporate responsibility is taking on a new meaning. Through technical innovation, education, business collaboration, and our giving back initiatives, we are committed to creating a more sustainable future for the fashion industry. Being a responsible corporate citizen is woven into Alvanon's DNA. Our global team, led by Alvanon's CEO, Janice Wang works together to uphold values based on a belief that; Sustainable business works across the three Ps – **People, Planet and Profit.**

To illustrate how sustainability makes good business sense and is closely linked to efficiency, here's a testimonial from Alvanon client, Studio Jux.



Photography, Willem de Kam

CASE STUDY: STUDIO JUX

When Caring For People & the Planet Means Profit

By Katinka Van Beveren and Emily Robertson-Hood

Ethical Dutch label, Studio Jux, shows how best 'fit' practice across the supply chain is helping sustain its Nepalese production partners, its customers and its bottom line!

Ethical and commercial – the best of both worlds

Dutch clothing label Studio Jux is a business that puts its values at its core - building its brand on the back of its sustainability credentials, offering an alternative to fast fashion.

Through a mentorship with fit technology company Alvanon, it has reduced returns by 50%, and reduced the number of samples produced for each item by approximately 75%. It has done this by improving the communication of size and fit across the supply chain - from design studio, to factory, all the way through to the consumer.

Its ethos is based on maximising social economic impact, while minimising its environmental footprint. With fair-trade ideals at its center, each garment is crafted by Nepali tailors under fair labor conditions, monitored by the Fair Wear Foundation. With the slogan 'MY NEPALI TAILOR IS A ROCKSTAR,' the Handshake program allows customers to "meet" the makers of their garments via virtual profiles on the label's website.

Sustainable business strategies take many different forms and is not only about choice of sustainable materials and manufacturing and ethical working standards. One strategy often overlooked is reducing the amount of waste produced through garment production and sampling.

The brand was facing significant issues around consistency of fit and product communication, leading to increased rates of returns and markdown. After winning a place on Alvanon's coveted Dr. Kenneth Wang Mentorship Program, Studio Jux has gone on to significantly streamline its product design, sampling and manufacturing process, leading to a significant reduction in returns and wastage.

Before the mentorship program began, the brand faced several issues including:

- **Fit and sizing consistency:** Fit and sizing between product groups and collections were inconsistent. Returns were being driven by inconsistent fit.
- **Communication efficiency between Amsterdam headquarters and Nepal factory:** Communication was challenging, particularly during production peaks. Instructions from the Amsterdam headquarters on samples were not followed or misinterpreted for production at the Nepal factory.
- **Ineffective online communication:** There was almost no communication around fit and size to help the customer choose the right size and set the correct expectations for fit.

Jitske Lundgen, co-founder of Studio Jux, said they were getting lots of complaints from customers around fit which was harming customer loyalty and discouraging people from making repeat purchases.

Through the mentoring program, Alvanon helped Studio Jux roll out a series of solutions including:

- **Fit Validation Project:** This saw Alvanon evaluate Studio Jux's body standards, product specifications, and compare this with target customer body data, then recommend the optimum core body standard to follow across men and women.
- **Fit Mannequins:** Delivering fit mannequins to the brand's headquarters in Amsterdam and the factory in Nepal. This meant that the brand was no longer fitting its garments on Lundgren's body.
- **Garment Grade:** Alvanon evaluated Studio Jux's current garment grade rules, optimising them by mapping the growth between the garment sizes to target how the brand's target customer's body changes across the size range. Alvanon also mentored the lead designer to ensure that she had the knowledge to explain in Nepal why the grade should change to better fit the target Dutch consumers.
- **Pattern Blocks:** Alvanon identified the key products and the block patterns needed for those products. Alvanon provided them with digital block patterns and with the strategy to implement pattern blocks in its supply chain. Alvanon also gave the Nepal factory graphic visuals of how to take a block pattern into a style, as pattern blocks were a new concept for the Nepali supplier.
- **Online Size Communication:** Alvanon evaluated the brand's current online messaging and recommended an updated marketing size guide with a visual on how to explain sizing to its customers, as well as how to optimise further communication on fit intent.



The mentoring program also included monthly meetings with the Alvanon team around implementation of the fit consultancy recommendations, as well as general business coaching sessions with CEO Janice Wang.

“The sessions were incredibly helpful. Our relationship with Janice, in particular, around the sizing issues, helped us become a better business. Even after the mentoring program ended, she continues to show an interest and help us,” emphasised Lundgren.

Core standard sizes now map to how the Studio Jux customer actually looks like in terms of body size, shape and stature, resulting in better fitted garments.

Rolling out fit mannequins in both the Nepal factory and Amsterdam headquarters means garment fit is much better and there are fewer production mistakes. The fit mannequins mean that many of the garment reviews happen on the fit mannequins in the Nepal factory, with communication of digital images sent via WhatsApp to Amsterdam, instead of sending a physical sample, reducing the environmental cost of transporting samples and material wastage. Having the same fit mannequins also means that both sites are speaking the same language, leading to fewer production errors.

“This has significantly reduced costs, as where in the past we were transporting four or five samples between Nepal and Amsterdam, it’s now one or two samples, and often we do most of the adjustments via the images we exchange,” said Lundgren. The brand said there has been a significant improvement also in garment grading, as it has now moved to non-linear grading, ensuring the garment proportions were consistent with a human body. This is resulting in better fitted garments across all sizes in the range, fewer returns and high customer satisfaction.

Good online communication of fit on Studio Jux’s website is now reducing the number of returns and customer queries.

“It has been an immense change, nobody complains about our fit any more, and people are now able to re-order our products confidently and know that they will fit,” Lundgren said.

The impact on the business has been “enormous,” emphasises Lundgren. “We took giant steps in our sizing and this had direct influence on our sales, and we saved significant cost. We feel we have grown into a professional organisation in the last two years with the support of Alvanon.”

But for a social purpose-led business such as Studio Jux, the shift is having a bigger impact. The business set up the factory with the aim of handing it over to staff at some

point. The shift to using Alvanon’s pattern blocks and fit mannequins means that they have a more collaborative and equal way of working with the Nepal-based factory. *“They can now see how a product sits and fits a western body shape, and it means that they are empowered to participate in a garment’s creation and design - it’s less about us telling them what to do, and increasingly more about us having a conversation about what the best solution would be.”*

In a country where literacy rates are currently lower than 60%, being able to work with fit mannequins instead of having to decipher Excel spreadsheets, creates a more direct line of communication for factory workers. The two sites communicate via picture messages sent on WhatsApp and can visualise fit issues rather than trying to translate written comments.

Lundgren says that staff in the factory are now increasingly telling her which block should be used for each design, rather than her telling them.

“We are working with development organisation Terre des Hommes to give them the skills and training to turn the factory into a co-operative, and the Alvanon fit mannequins are helping us to accelerate that development,” explained Lundgren. *“Despite what some may think, profit can coexist well with social and environmental impact,”* said Janice Wang, CEO,

Alvanon. “Other than the ‘old fashioned way’ of creating profit, social entrepreneurs like Studio Jux have added additional layers of opportunity. Where increased customer loyalty can be monetized, and risks can be reduced by applying good sustainability ‘fit’ practices.” She added: *“Greater long-term profitability is possible because of the resilience these types of investments bring, building a business that enables the flow of capital towards social good.”*

Value of mentorship program:

€85,000

Reduction of returns:

50%

Cut number of samples by

75%



Skills to Win the Sustainability Revolution

By Catherine Cole

In addition to social and economic factors, the future of corporate social responsibility will be further shaped by the acceleration of technology in our lives and the workplace; in fact it is widely reported that we are facing the Fourth Industrial Revolution. In the 1850's we saw the age of mechanisation (the industrial revolution), fuelled by water and steam, followed by mass production automation (electric power), then computerisation and automation. Now we face the era of cyber physical systems and robotics. What does that mean for the modern-day workforce?

It's probable we will see huge disruption not just on industries but on its PEOPLE, with significant shifts in labour markets, practices, working conditions. A robot is after your job isn't a new panacea, having been reported by the New York Times as early as September 1980. Not surprisingly, as robotics emerged in the textile sector as early as the 1790's, particularly in operations requiring high levels of precision such as spinning. In short, we have had 200 years of worrying about the threat of machines on our jobs! So here are some new headline facts to digest:

- Nearly 400 Million Workers Globally Will Need New Jobs by 2030 (McKinsey Global Institute, 2017).
- Certain Jobs Are More Likely to Disappear Due to Automation - forecast to shrink or fully disappear are production and administration (World Economic Forum, 2018).
- 50,000 people set to retire in the Luxury market in the next few years, Stefania Lazzaroni Managing Director of Italian Luxury Goods Association, Altgamma
- The five key skills expected to be required in the Industry 4.0 are: digital skills; programming skills for robots and automation; working with tools and techniques; technology & computer skills; and critical thinking (Stolzoff, 2018).

The fact is, our labor force is being challenged, and with no pipeline skills or experience and a fear of what tomorrow's jobs will look like, the future feels uncertain.

The average shelf life of skills today is five years, making workplace training for business and individuals alike essential. For example, how many pattern makers have coding skills? This is just one example of the new blended skills which will be required as we approach Industry 4.0, ruled by automation and artificial intelligence.

The negative perception of manufacturing will be reversed as new career paths emerge for individuals with strong cognitive skills, grounded in mathematics and science. Alongside the challenges of new technology, we are also faced with failing to harness the skills of a retiring workforce; the craft of our industry must be preserved as a foundation for innovation. Jonathan Anderson, fashion designer and creative director of Loewe hit out recently against the 'non-reality' of digital technology, reminding us of the beauty of hand-crafted objects (Morby, 2018).



IS THE APPAREL WORKFORCE FIT FOR PURPOSE?

For apparel businesses, the accelerating pace of change has been all-consuming — from competing with fast fashion, to facing pressure as retailers close bricks-and-mortar stores; the focus has been firmly on the short-term strategies that will keep businesses thriving. As the industry embarks on the next industrial revolution (digitisation), apparel businesses need to ensure that their workforces have the correct technical skills in order to remain relevant and fit for the future, particularly as the current workforce ages.

The imperatives for businesses now include figuring out how to engage employees and provide professional development, or risk losing them. As the war for talent continues, apparel businesses must make more of an effort to attract people back into roles that may have been perceived as un-glamorous.

There is now an opportunity for the apparel industry to rethink their supply chain talent and skills.

Businesses can get ahead by rejuvenating traditional roles and ways of doing things, while also rethinking employee talent and HR management.

Key headlines from the 2018 ‘State of Skills in the Apparel Industry’ report included:

- Respondents indicated a key area for training was technical/product development skills.
- Barriers - 54% of respondents indicated time pressure as the biggest inhibitor for training, followed by relevant training not available and tight budgets (so cost-effective solutions required).
- Only 42% of managers and 34% of non-managers were satisfied with current training.
- 73% of business leaders said that employee learning and skills development was a key business issue.
- Across the board, executives globally ranked “re-inventing careers and learning” as the second most critical business issue behind going digital, with 83% saying it was urgent (Deloitte, 2017).

FASHION INDUSTRY’S ‘WAR FOR TALENT’, DEMAND FOR VOCATIONAL SKILLS

What came across loud and clear was the real need for relevant, cost-effective training, which was delivered in context to roles today, with 70% of global organisations indicating that employees haven’t got the right skills.

Angie Lau, CEO of intimates factory Clover Group, said: *“There is a huge gap between what our employees learn in school and what real life is like in the factory.”* Created by parent company Alvanon, MOTIF was launched in October 2018, to bridge this gap and give access to training, professional development and mentorship from the industry’s leading practitioners. Education has long been part of the DNA of Alvanon. Alvanon’s MOTIF platform encourages and enables industry-wide education in technical and vocational skills. MOTIF online courses are presented by apparel experts with the most in-demand skills and are positioned as complementary to initial education, bringing work-based learning which is relevant to the industry challenges today.

As an apparel knowledge hub MOTIF connects apparel professionals around the world with the skills and industry expertise that can transform their businesses, lives and careers. The fashion industry has been built on centuries of craftsmanship passed from one generation to another in some form of apprenticeship.

Today these age-old techniques are combining with the most advanced technologies. The fashion world needs innovation, technical intelligence, and practical skills to tackle the challenges of the future and counter the global race for talent. Our vision is for professionals at every stage of the value chain to be able to develop themselves continuously, anywhere, anytime.

The approach taken by Motif.org is to develop courses that are relevant to the industry today based on re-training the fundamentals (craft), shaped by new trends, technology and methodologies.

The courses are suited to both newcomers to the industry and people in the sector who are looking to up-skill and are easily accessible at any time across all devices. The step-by-step online courses take learners on an engaging journey, with interactive learning tools and multimedia course materials, including video and animation; punctuated by assessment, which is required for successful completion of specific modules. MOTIF recognises the modern learner is not only more mobile, tech savvy and collaborative but also time pressured, the courses are therefore between 3-6 hours in duration depending on the content.

The 2018 ‘State of Skills in the Apparel Industry’ report indicated the most important area to address was technical/product development skills. Hence, some of the current courses include: Mechanics of Fit, a protocol for best practice fit process in business, Apparel Costing, an in-depth look at the key factors which impact price and Sustainability in Fashion, an introduction to the topic.

SUSTAINABILITY IN FASHION

Sustainability in Fashion focuses on establishing a common language for professionals in the apparel industry that encourages communication across functions and better decision-making during product design. This course defines what sustainability is, explains why designers should care about it, shows how it can be integrated into a product’s lifecycle and illustrates best practices to deal with sustainability issues. Course participants will learn how sustainability can be an asset for their business, brand and end consumer. Sustainability shouldn’t feel like a heavy burden nor an insurmountable challenge; it’s an opportunity for innovation. The online course aims to empower any learner or team, inspired to think about new ways of designing, with the foundation knowledge, confidence and collaborative tools to begin their sustainability journey and embrace change.

Our landscape is complex and fast changing but offers huge opportunity for a sustainable future, if we can only retain knowledge, innovate and embrace technology whilst constantly adapting. In the words of Dr. Kenneth Wang, Founder, Alvanon “All we can do is evolve” and education will be the key to our success and informed we will all make the right choices across the three Ps – **People, Planet and Profit.**

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