

# Preface

by *Carla Lunghi, Francesca Romana Rinaldi and Marco Turinetto*

The desire to publish a book project on what the *Fashion System* means today and may mean in the future, forms part of a panorama of publications on fashion in Italy.

However, the motivation that drives us in this stimulating: editorial initiative is to provide truly effective tools between *research & edutainment*. The results of recent studies have in fact recognized the existence in people, institutions and businesses of every size and sector, of a noticable tendency towards changes in processes (of products and services). This publication aims to group together around a single concept, change for growth, the interests and goals of all those in Italy and in the world who have recognized that the adoption of new strategies is an incontrovertible need.

This volume thus seeks to meet a challenge, that of helping rethink and redesign behavior, models, and attitudes; in a word, the market approach of the sector and the Fashion System.

The book *What's Fashion? It's Method!*, edited by Carla Lunghi, Francesca Romana Rinaldi and Marco Turinetto, with an introduction by Arturo dell'Acqua Bellavitis and contributions from Nicola Guerini, Paola Varacca Capello, Susanne Kreuzer, Silvia Festa and Silvia Mazzucotelli Salice, examines the indispensable variables for the launch and management of a new creative process.

This book is the first product of the Milano Fashion Institute Series, the result of the research and studies of the Consortium of three Milan universities: Bocconi University, Cattolica University, and the Politecnico of Milan. It contains thematic essays, relates changes and ways to seize opportunities to not be left out, and is addressed to entrepreneurs, market-

ing directors, professionals, designers and students interested in understanding the principal characteristics and evolution of the fashion system.

The book begins with a contribution by Arturo Dell'Acqua Bellavitis, who in the introductory chapter «Textile Product and the Industrial Object: Offer, Consumption and New Markets», aims to describe the approach to so-called new markets in which the textile sector plays a decisive role in the creation of stylistic codes of an entire collection.

Nicola Guerini, with «The Made in Italy System. Why Education Can Fill the Gap between Innovation and Competitiveness», relates the relationship between “Made in Italy” and its production chain that offers the whole world a full-range service.

Carla Lunghi speaks of «Fashion between Culture and Innovation in the Era of the Web 2.0» and of the very close link between the complexity of fashion and new digital technologies for communication and production, while Francesca Romana Rinaldi, in the chapter «Fashion Future: Crafting Innovative Business Models in Fashion», talks of the emerging business models in the era of customer centricity and the new drivers of change in fashion: digitalization, technology, and sustainability.

Marco Turinetto, in «The Italian Fashion Model: Design, from Strategy to Creativity and Manufacture», describes the new scenarios for fashion products, where the centrality of the brand product manager allows for developing the Italian culture of know-how characterized by the uniqueness of producing industrial artisanship.

Susanne Kreuzer and Silvia Festa speak of «The Creative Process: Strategically Innovate Brand and Products/Services Thanks to Design», that is, of the new and important role of creativity and design in strategic innovation through the creative process that determines a new method for approaching products and services.

Silvia Mazzucotelli Salice in «Fashion in the Age of Digital Collaborative Production» explores the relationship between fashion and new technologies, making the case that the emergence of peer production and desktop manufacturing technologies may signal alternative paths of development for the Fashion System.

The book closes with the chapter «Made in Italy: The Performance of the Leading Italian Groups», in which Nicola Guerini and Paola Varacca Capello look at the largest fashion companies in terms of size and sales, analyzing some of their main characteristics.

## Introduction.

# Textile Products and Industrial Objects: Supply, Consumption and New Markets

by *Arturo Dell'Acqua Bellavitis*

An analysis of the peculiarity, scope of action and specificity of textile production and design, shows considerable overlapping between the two worlds, to the point that it becomes difficult to separate the area of textiles from that of design. Both of the contexts in fact implicate complex product systems and scheduled innovation processes.

In both specialized magazines and in common language, there is widespread talk of “design objects”, referring to the universe of articles characterized by a notable aesthetic component, and often introduced to the market in order to meet the indispensable need for novelty. In parallel terms, the expression “design” identifies the complex sum of the activities and choices that make up the various types of planning processes, which as is known, can likewise lead to a good – a product of design – a service, or whatever else is conceived in the creative-conception phase.<sup>1</sup>

Analogously, textile production identifies a multitude of products, for clothing and accessories, designed for the decoration and embellishment of the body, and is likewise subject to phenomena of a social nature, that implicate changes in uses and habits manifested over time by individuals. The textile sector is also inextricably linked to the area of fashion, where the concept of fashion can be defined on the one hand as a social phenomenon that is mostly spontaneous, aimed at manifesting the needs and cul-

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<sup>1</sup> “Oggetti, beni, manufatti, strumenti, apparecchi, gadgets, idee: prodotti nel senso di risultati, definitivi o transitori, di un qualsivoglia ‘processo produttivo’. Esiti materiali di una azione/trasformazione creativa” (Scarsella, 1982).

ture of a group, and on the other, as a phenomenon induced by the industrial system, to generate constant demand for new products.<sup>2</sup>

From this standpoint, the textile production system could be considered one of the prime causes of mutability of fashion, by virtue of its innovative characteristics “of need” and “of survival”. As Fred Davis argues, “no field of human activity has institutionalized and structured its very survival on the scheduled exercise of change, as has the design of clothes and other decorative activities”.

But design has also often been documented as a phenomenon of habit, an economic factor, and a contribution to the celebrated *Italian look*, which has been represented both by designers and stylists, by artisans and industrialists, but above all by products – or better, by images of products – that are fashionable.

Observations rooted in sociology further confirm that the borders of the fashion sector and the design sector are per se subtle, and at times non-existent. The multitude of so-called “personal goods”, to be worn or carried (clothes, footwear, bags, watches, glasses, accessories, etc.) is strictly interconnected with the universe of products with which the person relates (food, cosmetics, home products, means of transport, etc.), since those product sectors seem to be influenced by the same consumption mechanisms.<sup>3</sup> Clothing and the sphere of living are in fact considered the areas most affected by the phenomenon of aestheticization of consumption,<sup>4</sup> an expression used to designate the current search for products and occasions for purchase in which symbolic factors and intangible and emotional components are amplified, in order to involve and satisfy the complex sphere of senses.

“Mass consumption products, clothing, furniture: the brawl over new products, before and better than the competition that ‘sells’, takes place on a wide scale here. (...) Form, design, and product image thus become the decisive elements to tip the scales to one side or the other”, affirms Patrizia Scarsella.<sup>5</sup>

As Bucci says, the added aesthetic and sensorial value seems to represent the area of preferential design for many sectors, in particular for the vast

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<sup>2</sup> Saviolo, Testa, 2000, p. 9.

<sup>3</sup> Bucci, 1998.

<sup>4</sup> Bucci, 1998.

<sup>5</sup> Scarsella, 1982.

universe of objects destined for private consumption: that which is consistent with the needs of the so-called post-modern consumer,<sup>6</sup> who in the current era of non-needs, principally bases her choices on criteria of taste, taking for granted the intrinsic quality of the products: "... in a market that tends towards saturation, goods with higher narrative and performative content find room. Not that the concept of function has been eliminated from the new design culture, but to the contrary, the interpretative and functional abilities of a product have expanded. [...] While waiting to unite that which has never been united: seduction and utility, play and function".<sup>7</sup>

Precisely due to this market "saturation", in these years of economic crisis many companies in the textile sector have – correctly – invested a great deal in research and innovation. Yet it is important to stress that an important part of the success of each innovation lies in the receptivity of the reference market, and that in a globalized context, the reference market cannot and must no longer be only the domestic market for the business. Thus for years, and alongside "pure" research (generally understood by businesses as product research), the most competitive companies have wisely conducted research dedicated also to comprehension of the different global markets and a vast array of potential new users.

The approach to the so-called "new" markets in fact passes through the full comprehension of how segmented these new realities are, of which products are attractive, of how the distribution is characterized, and last but not least, of what the protectionist constraints are, such as import duties. It is known, for example, that in markets such as Russia, beyond the contingencies linked to the economic sanctions, it is impossible to enter directly without the intermediation of a local group for bureaucratic reasons, and as is known, each intermediation entails small or large interference in the transmission of the image, value and even the use and positioning of a textile product. In other countries, on the other hand, with respect to independent distribution, large structures exist that often propose the supply of textiles together with all other aspects regarding living, and within broad and hyper-specialized centers, where the role of local designers is essential (such as in China).

At the product level as well, it is also necessary to present some specific reflections, since not only are the colors and patterns of a textile prod-

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<sup>6</sup> Bucci, 1998.

<sup>7</sup> De Angelis, 2001.

uct strictly linked to taste and habits in different areas, but other visual factors (such as transparency or iridescence), or touch (such as texture, but also the weight of the fabric itself) also change in relation to various cultural situations. It's obvious how important these factors can be if we think of how the vast market of curtains and luxury textiles sees the Chinese market capable of absorbing 42% at the global level. However, if we speak of China, it is necessary to understand how it is actually a segmented market, or better, various markets united under the same flag, at least some of which are truly "new" even for most Western textile manufacturers. This public often looks to tradition and aspires to historical Italian products, because the stylistic reference is eighteenth-century Europe or eclectic architecture.

Yet there exists another area of consumers with high purchasing power that tend to be concentrated in the most industrialized and dynamic areas of the country, such as Guangzhou, Shanghai and Shenzhen. They are managers, engineers and researchers who return from the U.S., Germany and Great Britain, who love contemporary style and seek natural fabrics with neutral colors, that are physically and visually light. Particularly interesting for our designers and companies would be a visit to the production district of Haining, a city southwest of Shanghai, not far from Hangzhou.

Haining is known above all as the capital of Chinese leather and furs. For this production activity a Leather City was created which extends over 320,000 square meters. The goal is to provide visibility and allow for sales to the enterprises in the local area.

In parallel, since the 1980s' a strong textile district has developed and been consolidated, specializing in textiles for interiors and for the home in general. Approximately 13,000 businesses are in fact located in the area and produce a very broad range of products: from curtains to fabrics for upholstery, as well as bed and bath linens.

In this case as well, the municipal authorities built a "home textile center" in an eighteen-story building, the first five floors of which will be used as a showroom for the main companies, while for second-tier companies trade fairs are organized periodically aimed at various categories of operators. In a visit to these areas and companies, I was able to see how the technological level of the various production companies is now very close to that of our businesses, while there is still a large gap as regards product design and branding. The local operators have, however, understood the importance of design as an essential competitive tool to shift from the role

of contractors to that of enterprises able to achieve the proper, direct positioning on the market.

Today the producers in Haining essentially target the internal market, which is very strong and in constant expansion. Yet it is necessary to consider the timeframe for realization of the New Silk Road that will connect China to Europe by rail, which due to costs well below those of today, could lead to a true collapse of the Italian industrial economy. Delivery times and small quantities, in essence the just-in-time policy of our companies, could in fact collide violently with situations in which production costs, even if they rise over time, are entirely incompatible.

Even in a nation such as Brazil, which is culturally and traditionally “closer” to us than China, we find areas, such as São Paulo, that for years have been part of that internationally oriented market that Italian businesses know well and participate in (in spite of low participation of our textile sector at the event entirely dedicated to “Made in Italy” that took place in 2013 and 2015), but there are also areas relatively unknown for us, such as Blumenau, where to the contrary, there is good knowledge and widespread interest for Italian products, together with a growing interest on the part of Brazilian textile companies, that are quite open to creating new joint ventures with Italian enterprises, which they recognize for their high skills, especially from the standpoint of design and innovation.

Despite the high level of customs duties and the complexity of the system, it is undeniable that Brazil currently offers a very interesting scenario, especially for high-quality products, thanks to the ever-increasing number of new rich, and the continuous growth of the middle class.

Italian businesses are certainly less familiar with another country in South America, Chile, a nation that, despite the deep social wounds of the end of the century and the stains in its recent history, now has good reason to smile, due to inflation limited to 1.5%, with unemployment several points lower than that of Italy. GDP grew 4.9% in 2016, part of a trend of stable and constant growth for four years, that was only barely affected by the global crisis (and the third best growth rate in South America).

This small sample of data should suffice to bring attention to a market that deserves analysis and further examination, where the value of “Made in Italy” textiles is also well known and recognized, and could represent fertile ground for future initiatives as well.

In addition to these social and cultural components of international markets, we must however recall that climate variables also considerably

velop a flexible production system able to offer multiple collections, but without falling into an excess of eclecticism.

The analysis of sales trends in various product sectors increasingly shows us that by now narrative components are increasingly essential for the placement of textile products around the world. And although for new companies it is advisable to make *strategic* use of the best practices of design, many historical companies in Italian textile districts often have an incredible resource hidden in their historical experience, consisting of archives, experience and processes that are unique in the world, and rarely communicated and transmitted effectively.

With respect to the production of an excessive number of collections, each company should more effectively communicate its choices in relation to significant historical experiences and specific moods and research on trends that the Italian system effectively develops in the fashion and design sector. Italian companies in particular have a very high-level image at the global level as regards taste and style, but they do not always exploit that position of predominance by distinguishing themselves from the competition with a targeted offer, using excellent narrative skills with strong stylistic characteristics.

A virtuous example of a company able to combine great attention for new markets and communication with product innovation is in my view represented by Manifattura Domodossola. This enterprise represents and embodies a truly Italian story, an industrial history of great success that has gone through many seasons and even today, in times of crisis, demonstrates that ingenuity and adaptability that is typical of our best companies.

We are speaking of one of the most classic “family businesses” of our country, a foundational model that many now think is destined to disappear, but that in this case shows us an unimaginable vitality and a concrete and effective response to market storms: continuous and tireless work to anticipate and adapt to the evolution of the market.

Manifattura Domodossola has in fact successfully survived a century of history, wars, and global economic crises, always keeping the “Made in Italy” flag flying high, at a time when the most titled Italian industries, after having amply delocalized, are ultimately questioning their presence in their country of birth.

The path established already in 1913 by the company’s founder, Giuseppe Polli, was that of a company born to produce large ropes for ships, that with Polli was successful in tackling other markets as well. It was one



of the very first Italian companies to join the American Chamber of Commerce in Italy, a business that from the start was able to look to other countries, other product sectors, and other solutions. From ropes for ships to cables for mountain climbing, to the invention of nylon shoelaces, the passage was shorter than it would seem, for a company that already had innovation written in its DNA.

With the increase of global competition in its sector, Manifattura Domodossola once again expanded its product sectors, being capable of launching a new area of production, that of electrical wires covered in PVC. Today the company is still able to surprise us with the use of particularly cutting-edge machines and always being able to create new markets without ever waiting for the external conditions to impose that choice.

Visiting the company allows for recognizing the extreme ingenuity in creating any type of weave, looking towards the infinite operational possibilities this technique can offer. The company's creativity is evident not only in the design of unique machines, developed in relation to the materials used, along with its nature and weight, but also in experimenting new and continuous applicative solutions for the different surfaces derived from the mesh of threads or strings in the most varied materials. Products on design from the best-known international brands come to light at the company, to then be displayed in the most prestigious windows around the world, and in some cases, the material becomes the key stylistic feature of the chain itself.

Even the current scenario, which despite the economic crisis finds the company in a strong position as a quality contractor in the world of fashion and furnishing, does not seem to be the conclusion of a century-long arc. The company's management is currently working to identify new specific production areas which will not overlap with those of their clients, but that once again will open the path to a new market. The stated goal is the birth of a spin-off enterprise, also able to open itself to new challenges, but that maintains a strong relationship with the local territory through the founding company. This is indelibly engraved even in the company's show-room, that among the historical machines and various original artifacts, still today shows a wonderful little Italian success story that is still alive after more than a century, and an incredible example of a company that is innovative by its nature, an innovator in the search for new markets and in technology transfer, attentive to innovation in management and communications, as it is in terms of technology.

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