

A study on sustainable fashion initiatives in India

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ABSTRACT

The present study examines the progress of sustainable fashion in India by identifying the dimensions of international reporting standards adopted by Indian apparel retailers. The study reviews the relevance of adopting sustainable fashion in an emerging economy like India. The literature on sustainable fashion is reviewed and the reporting standards of companies in the sustainable fashion segment in India are selected and compared against the checklist developed as per international sustainable fashion standards, adopting a content analysis approach. The study shall provide insight into the standards adopted, and those which the Indian sustainable fashion brands are yet to adopt. This study analyses the Indian Fashion industry with respect to Vendors' understanding and initiatives in Sustainable Fashion. The analysis serves as a guide for the proponents of sustainability, policy-makers, fashion houses who want to enter the Indian (Sustainable) Fashion market.

Keywords

Sustainable Fashion, Indian Fashion, Fashion Supply chain, Developing Countries, Sustainable Development

Article Received: 10 August 2020, Revised: 25 October 2020, Accepted: 18 November 2020

Introduction

India is set to become the focal point for the fashion industry in the coming years, propelled by strong economic tailwinds, a burgeoning, aspiring middle-class, and a strong manufacturing sector [1]. This offers an unmatched opportunity for players who want to expand beyond mature markets. However, the industry poses unique challenges in terms of infrastructure and customers, and retailers must understand the direction of the worldwide fashion industry in light of Indian realities, before investing resources.

When the issue of sustainability rises to what can be called a defining "megatrend" stage [87], drastic change in the fashion and apparel scene can be expected, and sustainable fashion progressively achieves the center stage. [2], [3]. Sustainable fashion is mainly connected with three major dimensions: ecological sustainability, for example, the utilization of renewable and eco-accommodating raw materials [4] [5], social perspectives: issues related to reasonable wages, safety and health, and workers' rights [6], [7] and economic impact in the industry and market.

Findings by multiple international agencies highlight a movement in the focus of policy-makers towards sustainable development [8] [9]. In India, at the macro level, India's key developmental programs, policy focus and resource allocation align with the SDGs [10]. The SDG India Index 2018, intended to give a total appraisal of the exhibition of every State and UT in India, and to support pioneers and change producers assess their standing on social, ecological and economic parameters, has been developed using 100 indicators, covers 54 targets across 16 goals [11]. In the context of fashion and textile environment, The Union Ministry of Textiles, with Energy Efficiency Services Ltd (EESL), propelled SAATHI in 2018– a technology upgradation scheme (Sustainable and Accelerated Adoption of Efficient Textile Technologies to Help Small Industries) aiming revival and modernize the Indian power loom

industry. [12]. Ministry of Textiles, Government of India launched

'the SU.RE project' (short for Sustainable Resolution) in 2019, as an Indian apparel industry commitment to set a sustainable pathway for the fashion industry". To achieve fashion that contributes to a clean and green environment, it is a dedication by the industry [13]. These initiatives are of vital support to the fashion industry, and more such initiatives are required to improve the socio-economic impact of the industry. The True Cost, 2015 (movie) describes the various non-monetary "costs" related to social-economic or environmental issues, paid in fashion production, especially by developing economies which usually have weaker public institutions and ineffective legal implementation to uphold socio-economic progress [14].

To comprehend the sustainable fashion buying behavior, a number of studies have been conducted. A trend of rising consciousness about the environment among Indian customers has been concluded in previous researches. As compared to their global counterparts in 5 countries (USA, Brazil, Germany, China and the India), Indian consumers were willing to pay more for eco-friendly products [15]. In both metro and other cities, organic clothing is gaining consumers' attention [16]. In the case of luxury fashion brands, consumers around the world believe that "doing no harm" and "doing good" should be upheld as core values [17].

Companies are introducing eco-friendly offerings to tap the rising consumer preference towards environment protection laws and greener tech, in India [18] [19]. However, it is noted that environmental issues in business operations have received considerably less than due importance, than other success determinants, by major players in the retail industry [88]. Previous researches have studied green marketing and production work by Indian companies [20] [21] [22], and they have started using green practices to position their offerings differently and above competition [23] [18]. When it comes to academic studies undertaken to review the initiatives taken by Indian Fashion Companies there can be

found a gap in literature. Such a study will also help us understand the strengths and weaknesses in the progress of sustainable fashion in India, which paves the way for initiatives and reforms in the industry. This study also intends to bring out the importance of sustainability in the context of developing countries, using available literature.

Literature Review

A. Progress, Sustainability and Developing Economies

The idea of progress has been the one of the central governing concepts in human civilization [24]. As we know of the Great Idea of Progress, it was first jotted down by the renowned French scientist Fontenelle in 1683: “mankind with the new science and improved technology had entered on a road of necessary and unlimited progress” [25]. A clear synonymy between ‘progress’ and ‘western modernity’ became widely acclaimed [89].

The flip side, however, was that this capitalism around Industrialization definitely did not serve everyone equally. The difference between what we have named today as ‘first and third world countries’ increased when industrial countries exclusively enjoyed the gains of this new world economic system, and, would be coming out as a major topic of discussions on development or sustainability later on [26]. The major issue related to industrial development, ecological deterioration resulted from the exploitation of raw materials on an unexampled global rate, the grave implications of which were not foreseen initially [27] [28]. It’d be followed by a rise in sustainability concerns.

The discourse about sustainable development in recent times finds its philosophical foundation in the environmental and social movements in the 60s and then the 80s in the 20th century [29]. Sustainable development, like the term “environmental protectionism” is a concept that evolves perennially and its understanding today, tomorrow or yesterday might be relatively very different [30]. The landmark Brundtland Commission defines, sustainable development as the development which “meets the needs of the present generation without compromising the needs of future generations” [31]. The new definition brought in the angle of inter-generational equity [32], and is still the most-accepted definition.

The various sustainability goals, disclosures were not implemented or adopted (or voluntarily adopted), especially in the developing countries, simply because their stage of economic progress, welfare and state policies were different than that of the developed world. The pattern of development in developing economies follows that of developed economies [26]. This raises concerns for the developing economies. Firstly, developing economies, such as India, were not left at a great position after colonization [33]. Secondly, there was an uneasiness that the issue of “sustainability” might simply be invented to maintain the gap between first and third world countries [34]. Thirdly, since the institutions, standards, and appeal systems are relatively weak in majority of the developing countries, there is a multitude of obstacles in actually ensuring corporate responsibility [14]. This brings to light an

apprehensive state of affairs on the part of policies made by the Western world.

However, issues of sustenance are present because both developed and developing countries jointly use scarce resources and produce for the population [26]. The widening difference gap between first and third world countries caused development theorists to rethink the objectives and plans of the development paradigms and understand deeply the topic of sustainable development. [35]. Many developing countries accepted that they will have to bear the fallouts of any inappropriate industrialization. It will not be possible for them to damage their environments now and recoup later, given the lack of resources, technology, and time [36]. It has been noted that, in developing countries, there is a direct link between economic progress, poverty eradication, and better ecological conditions [37]. Sustainability, therefore, becomes of special importance to developing countries like India, where social issues and public needs have exceeded the grasp of public institutes [38]). It calls for a more vigilant sustainable approach from the developing countries. [39] concluded that when the system changes its objective to ensure the best quality of life, rather than only concentrating economic growth, things improve drastically.

The following section brings to light the importance of sustainable fashion for developing economies.

B. Sustainable Fashion and Retailers’ Motivations

To quote information about an ordinary pair of jeans: ‘2/3rd a pound of toxic fertilizers- pesticides are required. These chemicals directly affect farms, then seep into the soil and the ground-water, cause cancer, immune and nervous system disorders, and pre-natal defects, and severe damage to wildlife. Apart from these chemicals, water is an essential ingredient: 2,000 gallons to cultivate the cotton crop and dye for fabric that goes into a pair of jeans. This water and chemicals interact, and contaminate drinking water and water habitats when discharged’ [40]. Doyle, 2006 noted that, nearing the 21st Century, fading mass production, surging seasons and collection, and changed structural characteristics in the supply chain had pushed retailers to demand minimal price and high flexibility in design, quality, delivery and speed to market: the defining characteristics of ‘Fast Fashion’ as we know today [97]. Kate Fletcher explains the rise of a vicious cycle: buying more clothes than needed, clothes which exploit workers, and energy resources, expand ecological footprint and produces waste [41]

In the 1960s, as the consumers gradually became conscious of the fashion’s environmental footprint, they demanded stark improvement in the industry’s operations, giving rise to the concept of sustainable fashion [42]. Sustainable fashion is an alternative trend in place of fast fashion. “Sustainable fashion”, or ‘eco-fashion’, can be understood as an element of the developing design, production, and consumption concept, achieving the long-term objective or forming a framework which is maintainable indefinitely with respect to our social and environmental accountability [43]. Fashion, when incorporates the long-run perspective of sustainability in which it concentrates on artisanry and craftsmanship as the nerve-center, and is not merely seasonal in nature, can be understood as an art [90]. A

garment, from just being a wearable article, can be transformed into, a creation that expresses creativity, character, and unique identity [44].

Cara Smyth says, that after the collapse of Rana Plaza in Bangladesh, the adoption of the UN SDGs, and various agreements like Paris Climate, a gradual change is definitely taking place [45]. To increase the pace of this 'change', cross-sector partnerships will be required to provide solutions industry-best practice as well as financial success. A number of organizations in the fashion industry are acknowledging their responsibility, and adopting sustainable fashion practices.

Once alleged with the employment of sweatshops, Nike demonstrated this 'change' in the fashion industry owing to its high reputational stakes, and worked over the past 20 years or so to improve its supply-chains operations. To further the freedom of association, a protocol was ratified in 2011 by trade unions, sportswear employers, and global companies, like Adidas, Nike, Asics, Puma, Pentland, NB [43].

Levi Strauss & Co. started using a host of eco-friendly raw materials like natural indigo dyes for color, organic cotton, buttons of coconut shell, labels of recycled cardboard, to manufacture denim jeans [46]. In India, fashion couture labels have been promoting slow and eco-fashion. In 2007, organic clothing label "Grassroot" was launched by the House of Anita Dongre [47]. Indigenous hand-woven cotton apparel brands, Fabindia and Khadi, have also started sustainable collections [48].

C. Dimensions of Sustainable Fashion: Environmental, Social and Economic

Sustainability reporting by organizations to its stakeholders is done on 3 broad dimensions of economic, environmental, and social performance. Popularly linked with environmental sustainability, Sustainable fashion utilizes renewable and eco-friendly raw materials, aims to decrease carbon footprint, as well as increase durability and product life. [5] [49]. The social dimension includes issues like safety, wages and labour rights as given in previous studies [7] [6]. For the economical dimension, companies should aim to strike a green balance of ecological consciousness and organisational and market economics [50]. A personal relationship with organisational stakeholders is considered important to achieve sustainable fashion: it breeds empowerment of the stakeholders and gives them a 'say' in business decisions, creates mutually beneficial relationships that further the slow fashion movement, and collectively develop ethical values and conduct [51] [52].

D. Sustainability Reporting

The formation of one the largest industries globally, the Fashion empire, operating at more than trillion-dollar worldwide, was marked by producing apparel at infinitesimal cost [91][53]. Delusional, the industry was unresponsive towards change, also with conditions beyond the industry's direct impact. With time, though, Apparel brands, however, have started to acknowledge the impact that comes with inexpensive garments [54]. It was impossible to function in this manner over a long time. Also,

incorporating sustainability in the fashion supply-chain, brings a unique set of challenges.

First, an absence of a clear understanding of what sustainability means in this industry comes from the fact that the vast industry consists of numerous retail segments, such as athleisure, sports, formals, high fashion, high street, prêt, department, mass-produced, fast fashion. There lacks a "one size fits all" answer for the sustainable fashion market since obstacles linked with developing sustainability for each model will differ. Generalized incorporation of sustainability at the organizational level has been discussed and disputed again and again over the years [55] [56].

Second, in an extremely complex, worldwide supply chain such as apparel [57], transparency may be a utopian concept. In the race to be competitive manufacturers are pressured into cutting not only prices but also cutting corners. When extended to the concept of cyclical economy, a process that includes collecting, reusing, and/or disposing of the garment after its consumption by end consumers, more complexity is introduced. This complexity means humongous obstacles linked with tagging and monitoring, then reporting and inculcating accountability along the whole supply chain [58].

Third, the fashion scenario has been increasingly moving towards a fast fashion proposition, a model that encourages the speedy acquisition and disposal of garments by the market [91][59] [60]. The "fashion appetite" of the market expands as a result of increased availability, which consequently increase the consistency between intention of consumers who want ideally to purchase sustainable fashion, and their behaviour, as they may not always execute the claimed intentions [6] [92]. A variety of reasons could be noted as obstacle to progress: limited information, no little awareness and knowledge [92].

In spite of such hindrances, fashion brands have adopted sustainable policies [93]. Media communications form the primary image, consisting of both information of qualitative and quantitative nature in sustainability reporting. Independent reports dedicated to the topic of sustainable operations and inclusions in financial documents company annual reports may also be used, apart from company web sites with a comprehensive section on 'sustainability' which are used to broadcast such information. [58] [61]

The Global Reporting Initiative defines Sustainability reporting as one which "helps organizations to set goals, measure performance, and manage change in order to make their operations more sustainable. It is also the most accepted set of sustainability reporting guidelines. A sustainability report communicates disclosures about an organization's impacts on the environment, society and the economy, both negative or positive [62].

Guidance to all sectors is provided by The Global Reporting Initiative. In addition to G3 guidelines, the Global Reporting Initiative had also produced a version that concerned the requirements of the fashion industry specifically, in form of the Global Reporting Initiative Apparel and Footwear Sector Supplement (AFSS) [63]. Serving as the initial guideline available specifically to the apparel industry, The GRI AFSS addresses the shortlisting of indicators and reporting around sustainability. Divided into 4 segments: supply chain, environmental, economic and social, overall consisting of 34 sector-specific performance

indicators [63]. The GRI AFSS may not help understand all the sustainability concerns around which fashion brands operate since it primarily concentrates on supply chain-related issues. Organisations are allowed management discretion as to what and how they want to communicate information, apart from its voluntary nature of adoption, form some of the limitations.

Methodology

A. Research Question and Hypothesis

Even though, in the past, sustainability indicators have been utilized by some researches to comprehend corporate sustainability reporting [64] [65] [66], there can be pointed a considerable gap in academic literature of such a tool to be employed to study sustainability reporting in the apparel industry, that too in the Indian fashion industry. This is an interesting research opportunity due to the foundational impact of individual variables under broad dimensions in reporting progress, or shortfall thereof, in achieving sustainable objectives [98]. The central research question is then framed as:

RQ: Which elements of Sustainable Fashion are catered by Indian Apparel Retailers?

Another outcome of this question is the study of elements of sustainable fashion which are not currently catered by Indian apparel retailers. It would provide a future scope for the development of the industry. Based on study of environment and elements of sustainable fashion in India, the paper proposed the following Research Hypothesis:

H1: The sustainable fashion industry is currently in developing stage in India.

B. Methodology

Sustainability reporting can be achieved using the following major methods: company web portals, a section in company annual reports, or independent sustainability reports. Due to the voluntary nature of sustainability reporting, a number of researchers have felt the need to analyse the structure, indicators and content of stand-alone sustainability reports [67]. Moving forward, some have brought sustainability reporting in the context of the fashion industry as well. In 2013, a research of 156 companies involved in sustainable fashion retail on the internet was conducted by Fulton and Lee[77]. The study used content analysis of website communications to comprehend the utilization of guidelines given by The Global Reporting Initiative in the apparel industry, finding that the GRI provided a useful framework to report and communicate sustainability impact and undertakings effectively and efficiently. However, it was also held that there were wide differences as to how the guidelines were interpreted, applied and reported. In 2014, Turker and Altuntas, conducted a review of publicly available sustainability reports of fast fashion companies, to analyse their approach to 'sustainable supply chain management'[99]. It utilised the key sustainable supply chain management concepts identified by Seuring and Müller in 2008, to conduct a content analysis of such reports, analysing like risks, parameters for upstream entities, communication approaches and supply-chain

performance[100]. It was concluded that, reporting consists of information about water and energy use, waste reduction activities as well.

Therefore, for the purpose of this study, a content analysis methodology was utilized. A three-step mechanism was followed. First, Research variables (in form of a sustainable checklist relevant to apparel retailers) were formed after an extensive review of GRI and literature of previous researches in the field, which covered environmental, economic and social aspects of sustainable fashion. Secondly, a sample of Indian sustainable apparel retailers was chosen, and content analysis of sustainability communications in the form of sustainability reports, website communications etc. was done. Finally, the Research variables(sustainable checklist) was then juxtaposed against the content of the sample companies, to understand how many companies are incorporating such variables in their sustainability reporting. In-depth analysis was then done to reach findings and conclusions to the research question 1.

C. Research Variables

Improved integration of a host of sustainability principles is required throughout the operations in the fashion industry, as highlighted by numerous authors [68]. Various issues, such as improving management practices related to supply-chain [69]; the need to integrating sustainable foundations in the initial phases of the value chain, like the product design process [70] [60]; improving engagement with customers [71] [72]. Like innovation is emphasised in a lot of industries, its need is also acknowledged in the fashion industry [72]. In conclusion, it can be said that researches bring a dire change in structure, business, and operations of the industry, is brought to the spotlight [60].

For the purpose of this research, sustainability variables are identified on the basis of GRI standards and extant review of literature, shortlisted according to the Indian apparel industry, and divided into 3 categories: environmental, economic and social. Business decisions may have impacted more than one dimension of sustainable fashion. For instance, Overseas production of fiber, fabric and garments breeds a weighty environmental footprint than local production (environmental impact) [73], apart from diverting employment opportunities away from locals workers (social impact). In such a case, discretion is used with regards to the apparel industry in the Indian context, as to which dimension is more relevant comparatively.

The environmental impact of fashion stems from an organisation's interaction with the environment from which it borrows resources and carries out production, in order to deliver the final product. It ranges from the use of like water, materials, energy and discharge of inorganic compounds and chemicals, and emissions. It also includes the company philosophy with regards to fast fashion, and post-consumer environmental footprint of the product, and environmental footprint and biodiversity affected due to company's operations.

The social impact variables here are, with respect to employees: Health and safety, Labour Norms/Fairtrade/Employment, Human Rights (Child Labour/Education), Diversity & Inclusion, and with respect to consumer and society: Cruelty-free/Vegan fashion,

Company donations/philanthropies, Local manufacturing & Communities, Customer sustainability program, Heritage and Indigenous Crafts. The checklist has been developed by keeping in mind the holistic impact of sustainable fashion, focusing on the Indian context. For starters, Heritage and Indigenous crafts may not be a decisive sustainable fashion in another country, but since the fashion industry flourishes on employing a variety of skilled craftsmen, and, on the marketing of products based on their tastes and preferences which have a bent towards local and national identity, they hold special importance in India. More importantly, because colonial and western influences have not treated the indigenous industry as it should have been.

Economic impact of fashion, though not studied extensively, is brought to light in the study. These variables might have an environmental or social impact incidentally as well. It includes circular business models, Building, Supplier transparency and traceability, Sustainable Process/Product models, Ethical marketing International Collaborations, Sustainability Report, Patents & Innovations.

As mentioned before, the complexity of the supply chain is a major issue [69]. Every company might be starting its operations from a different reference point. The supply-chain for any large apparel brand often consists of thousands of suppliers, distributors, and retailers.

For instance, a company might be outsourcing its fabric production to another organisation, in which case the, labour employment norms and might change, as compared to a company that owns the whole supply chain.

D. Sample Characteristics

A representative sample provides a fundamental basis for studying the dimensions of sustainability. To select the sample of companies from Indian apparel industry, following trends

were noted. is At the size of US\$ 100 billion in FY2019, the domestic market of apparel and textile has expanded at a CAGR of 10% from FY2006 [94]. It was marked by the growth of organised retail, favourable demographics, rising of the whole population, particularly middle class, and increasing per capita income, driving consumer demand for apparel and textiles. Such pace of development in the indigenous textiles would be encouraged by a rise in consumer-facing industries like hospitality, housing, healthcare, etc. This has increased opportunities for apparel brands to tap a burgeoning market. However, in terms of sustainability, there has been less than required progress. Majorly, brands are 'going green' instead of 'started green'. Though adoption of indicators sustainability reporting is increasing, its voluntary nature, non-uniformity in the application, the validity of claims, pose serious doubts about the premature systems [95][96]. [74] [75].

Therefore, to arrive at a sample, this paper applies the following criteria: Firstly, the company should be incorporated in India and thus should not merely be an expansionary arm of a foreign apparel retailer. Secondly, it should have an apparel focus. Thirdly, it should have a working website, with communications about sustainability in the form of Sustainability reports, other reports, or website content. This highlights their dedication to the cause of sustainability, and, underlines transparency. After

filtering out sites that did not qualify under the three criteria specified above, the study resulted in a total of 8 sustainable apparel retailers. The sheer number represents the early stage of the sustainable fashion industry in India. The sample taken is representative of a variety of organisation types: It consists of 2 large fashion multi-brand retailers, 1 couture label, 3 start-ups, and 2 ethnic brands. There have been various discussions in the past with regards to the size of the company and sustainable percentage, with its sustainable contribution in the society, which are taken up later.

Results

Table

The following table compares the sustainability variables, categorised in 3 dimensions: Environmental, social and economic heads(Left hand side column of the table). Every company in the sample is subjected to this checklist, and if the company is taking steps to inculcate and report sustainability in each of the variable, it is given a score of 1. These scores of individual companies are aggregated laterally, and found out how many companies are achieving sustainability in that indicator(Right hand side column of the table).

TABLE I.

	Content Analysis with developed Checklist	
	Variables	Companies Reporting (Out of 8 Companies)
A.	Environmental	
1	Chemical Management (Approved Chemicals/Chemical Free processing)	6
2	Energy & Emissions	5
3	Materials (Fabric, Dyes etc) (Eco-friendly/ Reclaimed/ Recycled/ Upcycled)	8
4	Water usage	4
5	Waste and Effluents (Fabric and Other)	5
6	Environmental Compliance & Biodiversity	0
7	Post-purchase (Laundering and care)	4
8	Rejection of fast fashion	2
B.	Social	
1	Health and safety	3

2	Labour Norms/Fair trade/Employment	3
3	Human Rights (Child Labour/Education)	3
4	Diversity & Inclusion	4
5	Cruelty free/Vegan Fashion	3
6	Company donations/philanthropies	6
7	Local manufacturing & Communities	7
8	Customer sustainability program	3
9	Heritage and Indigenous Crafts	5
C.	Economic	
1	Circular Economy	1
2	Building	2
3	Supplier transparency and traceability	1
4	Sustainable Process/Product models	6
5	Ethical Marketing and Disclosures	5
6	Product packaging	4
7	International Collaborations	4
8	Sustainability Report	2

A. Environmental

The culture of rapid consumerism, which means higher sales for the companies stands in the way of sustainable fashion in the industry. The fast-fashion business model, marked by agile production and distribution lead times [76], the consumption “inexpensive clothing that is meant to be worn a limited number of times” [77]. The model, though extremely successful commercially for companies [78], however, brings about utilization of lower quality materials and manufacturing, which then makes the clothing articles obsolete more quickly, driving it ‘out of fashion’ [79]. It has further deteriorated the adverse ecological footprint of the industry [61] [91]. Therefore, a rejection of fast fashion is in the process of adoption by many companies around the world. However, in India, only brands like Bhu:Sattva and House of Anita Dongre, are consciously rejecting fast-fashion. This highlights that rejection of fast fashion is yet to gain mainstream attention by Apparel brands in India.

Impact of using hazardous chemicals on the environment, the biodiversity and the people(not only workers, but also consumers) has been raised in previous researches ([69]. Even though the sample of Indian apparel companies are yet to reach ‘chemical-free’ tag for their products and collections, companies like Arvind Fashions and Aditya Birla Fashion Retail Limited are incorporating comprehensive Chemical Management Policies; companies

like Doodlage, No Nasties, Upasana and Bhu:sattva have also taken initiatives to root out toxic chemicals.

Energy and Emissions are managed effectively using some innovative alternatives; Upasana is using handlooms, which is used to weave cloth without the use of any electricity.

Materials, referred to fibres, are mainly organic cotton, Liva Natural Fibres (Aditya Birla Fashion Retail Limited); TENCEL™ (House of Anita Dongre); recycled cotton polyester, corn, eucalyptus and banana fabrics (Doodlage); Hemp, Bamboo, Cruelty free silk, Soybean, Modal, Aloe Vera, Pineapple fibre, Milk protein fibre, Flax Jute and Khadi (Bhu:sattva); handwoven Cotton, Silk and Wool (Fabindia), Organic Cotton (No Nasties), Medicinal Textiles using a blend of organic cotton and curative ayurvedic herbs (Upasana). Natural dyes, Dope-dyed fabrics (Aditya Birla Fashion Retail Limited), dyes using extracts from minerals, plants, and animals (Bhu:sattva) are also used.

Environmental Compliance according to GRI standard 307 requires disclosures related to Significant fines and non-monetary sanctions incurred by the companies for failing to comply with environmental regulations and laws. Biodiversity according to GRI standard 307 requires disclosures related to adverse impacts of products or processes on biodiversity, Red List species as given by IUCN, protected areas as well as areas of high biodiversity value. Such information is not currently provided by any of the companies in the sample.

Since significant energy and environmental impacts take place once the product is purchased by the consumer, it is a crucial but usually neglected factor of sustainability; fewer washes, less detergent, fabric-care are emphasised by few companies. Green dry-clean is an innovative approach communicated by Doodlage.

B. Social

Labour practices and conditions in fashion supply-chains have drawn public scrutiny, after the infamous incident at Rana Plaza in Bangladesh in 2013 [45]. Companies like Arvind Fashions are aiming to achieve Zero Accident through safety policy, Aditya Birla Fashion Retail Limited has adopted OHS Roadmap for hazard elimination, apart from other safety measures, training and drills. Fairtrade, a worldwide non-profit organisation operating in more than 75 countries, guarantees a base price for produce, and for community development projects like education, health, infrastructure and agriculture. The first Indian apparel brand to be licensed by Fairtrade in India is No Nasties. Other companies like Aditya Birla Fashion Retail Limited and Fabindia are also taking initiatives for better employment. However, there needs to be additional support and pressure from all stakeholders (government, consumer and labour unions) so that apparel companies take it up comprehensively. Companies like Arvind Fashions, Aditya Birla Fashion Retail Limited and No Nasties are upholding human rights like Abolishing child labour. Diversity and Inclusion is being taken up by Arvind Fashion, Aditya Birla Fashion Retail Limited and House of Anita Dongre. Cruelty-free/vegan fashion is a growing concern with advocacy of animal rights from organisations like PETA; No Nasties(self-certified) and House of Anita Dongre (approved) by PETA. Bhu:sattva are producing only cruelty

free fashion. A variety of CSR, philanthropies and donations are conducted a majority of the campaigns, addressing issues like education, employment, and women empowerment. Since India is a source of cheap labour for the fashion industry, all the Indian apparel companies are producing locally. Some are even catering to local communities; Upasana is acknowledging the presence of more than 500 handloom clusters in India; Community Tailoring Units where professional training to make garments is provided to rural women have been formed by House of Anita Dongre in villages of Maharashtra, India. Customer sustainability programs, in order to inform, educate and engage customers, are currently not widely used by apparel companies. It will open additional doors for companies; Doodlage plants one tree for every purchase in order to mitigate at least some environmental damage resulting from that purchase under the 'Buy 1 Get 1 Tree Program'. Heritage and indigenous crafts are protected and encouraged by companies like House of Anita Dongre in form of Indian Couture; Fabindia in form of ethnic wear'; Bhu:Sattva in fabric, colours, techniques and collections; Upasana through handlooms and block-printing.

C. Economic

Circular economy is promoted by Doodlage through Once Upon a Doug initiative, which upcycles and recycles fabrics discarded by production houses and post-consumer clothing, while also providing employment to women, to manufacture fashion accessories in a cyclical economy. Companies like House of Anita Dongre and Aditya Birla Fashion Retail Limited are especially conscious of their buildings and have invested to Make greener spaces and eco-conscious buildings, with the latest tech.

Supplier transparency and traceability is provided by No Nasties, who has announced its farm and factory where the products are manufactured. Ethical Marketing and subjects like inclusive sizing, gender and background inclusive etc. are yet to be adopted by Indian apparel retailers. However, House of Anita Dongre Doodlage, Bhu:sattva, Upasana and No Nasties are increasingly bringing sustainable and ethical narratives in their marketing. No Nasties claims Zero-plastic packaging of all its products; companies like Aditya Birla Fashion Retail Limited is cutting out redundant parts of merchandise packaging. International Collaborations are an important measure of aligning a company's vision; Better Cotton Initiatives, SAC, GRI, Carbon Pricing Leadership Coalition, Ellen MacArthur Foundation, Cotton 2040, Circular Apparel Innovation Factory are some partnerships by multi-brand companies like Aditya Birla Fashion Retail Limited and Arvind Fashions. Sustainability Reporting-Aditya Birla Fashion Retail Limited and Arvind Fashions announce independent sustainability reports, other companies communicate their sustainability initiatives through website content and media releases. No Nasties collaborates with 'Green Story' which does an analysis of water and energy use, emissions and land preservation and communicates key metrics in an 'Impact Report'.

Discussion

A. Trends

Indian consumers are getting more choices and access to global brands. An increasing number of people buy the 'quality affirmation' proposition of branded garments. Therefore, foreign brands with different USP have captured a major part of the market: Nike(sportswear), Zara H&M(Fast Fashion). Therefore, they set the trends for other(and Indian) brands to follow. Since the brands offering Fast Fashion is attracting a lot of millennials and middle-class, and Fast fashion brands like H&M and Zara are taking sustainability initiatives in their global operations, sustainable fashion is slowly moving towards achieving achieved mainstream importance in India. Narratives from high-end designers, western activist groups, NGOs, start-ups are making the concerns stronger and is strengthening the green purchase intention of the Indian consumer. Still, there exists an attitude-behaviour gap in purchasing sustainable apparel by the Indian consumer. Studying the penetration of the luxury clothing market in smaller cities in India, another market opportunity is highlighted [80]. Benetton, the Italian fashion brand, has experienced 20% growth from small Indian cities. [81]

B. Start-ups and Couture labels

In one of the studies, it is noted that a major retailer which is, say, 0.1% ethical with 5 million customer-base might actually be making more impact than a 100% ethical brand with 5,000 customers because they are, doing more good and making better change, even though their entire operation isn't that good.

It is also questioned if it were a profitable business model, the large retailers would have jumped on the opportunity. One reason may be that agility is the quality of smaller organisations, since multinationals have a large business momentum to drive [50].

Major Indian fashion companies operate through licenses of a number of foreign brands; therefore, they may not have a free hand in taking the strategic decisions for the Indian market. In this case, small and agile start-ups are leading the way with their extremely innovative and dedicated sustainable supply chains and offers, as seen in the case of Doodlage, No Nasties, also by 11:11, Brown Boy. These brands are gaining momentum in the market and bigger brands are following their lead. Moreover, Couture houses like House of Anita Dongre, Tarun Tahiliani can bring about the required change in Indian high fashion since the concepts of luxury are complementary to sustainable fashion. They can also bring about the importance of indigenous crafts and production techniques such as handlooms. These will then be taken up by ready to wear or prêt retailers. As noted above, since there are large number of retail variants in the fashion industry, there may not be a 'one size fits all' model. Therefore, cross-industry and intra-industry collaboration can be a great tool, since, sustainable fashion cannot be undertaken by a single company in isolation.

C. Untapped Opportunities

Since the concept of sustainable fashion is relatively new in India, some concepts have not achieved best practices. Supplier transparency and traceability is offered by a lot of worldwide brands. For instance, when 'Where Does It Come From?' manufactures a garment, a tag on it, allows customers to seek all the information regarding supply-chain, the workers and processes as well. Foreign companies like Rapanui, Thought and Peopletree, are pioneers of sustainable fashion principles [82]. Fairtrade is another concern that ensures reasonable employment conditions and living standards to workers; labour norms and their implementation which is not uniform, might not guarantee good conditions for workers (No Nasties). Inclusive sizing is another major opportunity for Indian players, which reflects the company's forward-thinking. It will also help root out body-shaming and other allegations brought in with fashion. 'Customer Sustainability Programs' is another way of differentiating oneself from competitor brands. The highest standards of sustainability might be achieved in adapting Cyclical Economy. A circular economy is works out of foundations of keeping waste and pollution to the minimum, products and materials in use, and reviving ecological habitats.

D. Marketing

Marketing plays a pivotal role in informing and educating the consumer about green products and processes. Instances of greenwashing, which means the sustainable claims by companies are actually phony, might make the consumer wary of any sustainable initiatives [83]. Greenwashing is a shortcut used by more and more companies today [84]. It is painting a positive picture of an organisations' poor environmental and socio-economic impact [85], which thrives on consumers' inability to verify it [86]). Once reality is discovered by the consumer, it may take more time to regain consumers' trust in sustainable fashion [83]

In general, Indian consumers' knowledge impact of green processes and products can still be called 'limited'. Maheshwari and Malhotra (2011) concluded variables, like convenience, brand name and price, help decide a consumer's attitude towards a sustainable product [19]. Therefore, companies can use effective marketing communication to reduce any perceptions that sustainable fashion is likely to be priced higher than usual collections. Also marketing celebrity advertisements creates the perception of unaffordable products, which should be used accordingly [50].

Conclusion

The paper has provided insight into the importance and understanding of sustainability for developing economies like India. Since the apparel and textile industry is a major exporter, and also employer and contributor to environmental, its actions and decisions carry a lot of significance to the socio-economic conditions of the place. Moreover, organisations and governments around the world are acknowledging alternatives to present business models of fashion companies. It should now be accepted that the

stage of 'niche' has given way to 'necessity' in terms of sustainable products and organisations around the world. Meanwhile, other stakeholders are also pressing organisations to incorporating sustainable or eco fashion initiatives in their supply chain. Therefore, it becomes imperative for fashion companies in India to initiate changes and move towards a sustainable business model. This paper uses the methodologies of 'content analysis' and 'checklist' to study how Indian companies are different incorporating dimensions namely; environmental, social and economic. It discusses which variables are currently accepted by fashion companies in their current models, and which variables are yet to be absorbed. It analyses the companies basis trends, start-ups and couture labels, untapped opportunities and marketing. There can a lot of variables that can be included by fashion companies to achieve industry and consumer recognition, and build 'n' number of campaigns around it. This will not only help them contain the harmful effects of their business procedures but also gain social acceptance and market share. Most importantly, managerial application of this paper includes serving as a guide for Indian companies who either want to diversify into sustainable fashion, or even International Fashion retailers who are looking to enter/ strengthen their presence in the Indian market. Policy makers and regulatory bodies can use this paper to base their decision making to guide the future growth, perhaps emphasising on certain variables in the light of country's requirements. Since, there is gap in academic papers which study sustainable initiatives taken by Indian Fashion Retailers, it brings a unique contribution to the industry and academia.

It is recognised that this study has certain limitations. First, variables can be studied in-depth, and judged qualitatively in order to gauge a particular level of performance. There was a limited analysis of the level of performance of each variable. Second, since sustainability reporting and sustainable fashion is in its infancy stage in India, only information available in the public domain was analysed. A larger sample and in depth-interviews can be conducted once more brands take up sustainable fashion.. Third, pure discretion was applied to categorise variables and judge performance. It is also important to note that the sample, though is representative might leave out certain other important initiatives as well

The future scope of research can include primary research with owners/managers to ascertain their view of the progress of the Indian fashion industry. Additionally, benchmarking can be done to ascertain the sustainable fashion initiatives in a developed country say UK or US. Statistical tools may also be applied for analysis.

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