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Sumith Gopura, Alice Payne & Laurie Buys

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The Fashion Designer's Evolving Role in the Apparel Value Chain: Perspectives from Sri Lankan Designers

Sumith Gopura ,
Alice Payne  and
Laurie Buys 

Abstract

Dr Sumith Gopura is a lecturer who specializes in fashion design and product development at the Department of Textile and Clothing Technology, University of Moratuwa. His research interests liaise between fashion design practice and fashion education. SumithG@uom.lk

In the South Asian Region, the Sri Lankan apparel industry is transitioning from apparel assembly to providing higher value-added product and services. Fashion designers are key actors in this transition. The purpose of this article is to examine the evolving role of the fashion designer in the Sri Lankan apparel industry. The study adopts a qualitative approach through semi-structured interviews conducted with twenty-eight fashion and product development professionals in the Sri Lankan apparel industry. Based on an inductive thematic analysis, the study finds that the Sri Lankan designers take a multidisciplinary approach to

their design practice, integrating the key functions of fashion design, product development and manufacturing capabilities, in alignment with the functional and strategic ambitions of the apparel companies. Their approach to design through technical skills extends the conceptual approach of brand designers in fashion design practice. However, the fashion knowledge of Sri Lankan designers varies significantly depending on their familiarity with Western brands and retailers as well as Western consumer culture and lifestyle.

KEYWORDS: apparel industry, industrial upgrading, Sri Lanka, fashion designer, fashion design practice

Introduction

The apparel industry in Sri Lanka (SL) occupies a significant position in the global apparel value chain, which is driven by transnational manufacturing (Athukorala and Ekanayake 2017). The apparel value chain binds developed and developing countries together, as they fulfill apparel demands by working in a common production line (Cattaneo, Gereffi, and Staritz 2010). The apparel value chain may be conceived of as six stages extending from raw materials, yarn, textile manufacturing, apparel manufacturing, distribution, and retailing (Stone 2017), with each stage adding value in the development of a final product to the consumer. Western brands and retailers hold more power in this process than the apparel manufacturing countries and control the higher value, knowledge-based, functions such as design, marketing and distribution (Cattaneo, Gereffi, and Staritz 2010; Weller 2007). However, the transnational brands and retailers, in restructuring their businesses to be cost effective, are pushing elements of higher value functions (design and product development) towards the manufacturing locations. Hence, as manufacturing countries such as SL are transitioning their business models from providing basic apparel assembly (Cut, make, trims assembly, also called CMT) functions to higher value-added services; they therefore require higher levels of skill (Gereffi and Memedovic 2003; Tokatli 2007; Athukorala and Ekanayake 2017). Fashion designers in both Western brand structures and Asian manufacturing companies therefore hold a significant position in this process and their capabilities are key.

Although many studies have examined the fashion product development (PD) process from the perspectives of designers or buyers based in Western brands and retailers (e.g. Goworek, Perry, and Kent 2016; Singh and Hodges 2011; Bruce and Daly 2006), an important missing dimension is the perspectives of designers based in manufacturing-intensive countries who are experiencing the shifts in value chain dynamics in first hand. The purpose of this article is to examine the evolving role of the fashion designer in the SL apparel industry in a time of industry transition. This study was conducted with 28 fashion and

Dr Alice Payne is Senior Lecturer in Fashion in the School of Design, Queensland University of Technology. Her research centers on environmental and social sustainability concerns throughout textile and apparel industry supply chains.
a1.payne@qut.edu.au

Laurie Buys is Professor in the School of Design, Queensland University of Technology. Her research interests include sustainability, urban environment, and social gerontology.
l.buys@qut.edu.au

PD professionals in the SL apparel industry, focusing on their careers in the apparel value chain. The participants had more than five years of experience in the SL apparel industry. This article discusses how the SL designers' roles and the processes of design have evolved over time, not only to deliver a full-package service — providing concepts and PD through to final products — but also to strategically represent the manufacturers' interests in connecting with Western brands and retailers. Our findings demonstrate that through working at the interface between the SL manufacturers and Western brands and retailers, SL designers make a substantial contribution to design and PD through their creative and technical skills.

Fashion Design and PD within the Apparel Value Chain

The apparel value chain consists of the full range of value-adding activities, including design, PD, manufacturing, marketing and distribution, that are required to bring fashion products to brands and retailers in Western countries (Acevedo and Robertson 2012). The transnational value chain approach emerged as multinational companies, typically based in Western nations, began to offshore labor-intensive manufacturing (Gereffi and Fernandez-Stark 2016; Goto 2017). The production and consumption of goods and services thus occur in different places, and multinational retailers from developed countries hold higher value knowledge-based key business functions while the Labor-intensive segments of manufacturing are relocated to developing countries with cheap Labor (Lee and Gereffi 2015). Western fashion brands and retailers, typically from the US, UK and Europe, focus on higher value functions, such as design, marketing, and distribution. In the value chain hierarchy of activities, CMT is the lowest value, with Original Design Manufacturing (ODM) a higher order activity, and Original Brand Manufacturing (OBM) is the highest value (Gereffi and Memedovic 2003). Figure 1 below illustrates a shared value chain approach in which Western brands and retailers undertake the majority of design (ODM) and PD, with some PD and all CMT undertaken by apparel

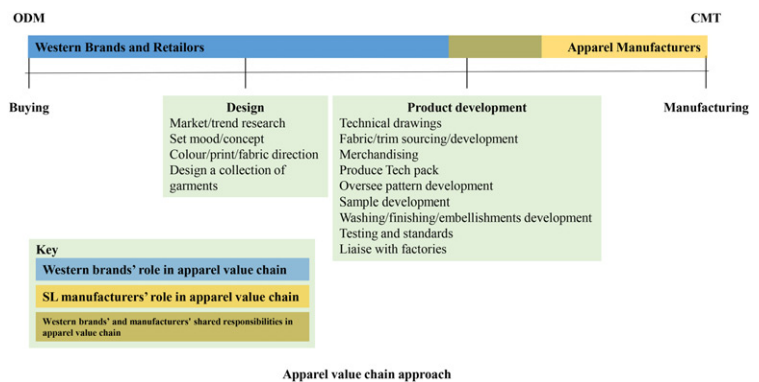


Figure 1 Apparel value chain approach.

manufacturers. In this way, the apparel value chain approach demonstrates the shared responsibility and points of collaboration between manufacturers and brands in the PD process.

Apparel manufacturing is a globalized industry that provides millions of jobs around the world (Cattaneo, Gereffi, and Staritz 2010; Gereffi and Frederick, 2010). Major apparel manufacturing countries in the Asian region are extending their services to the apparel value chain through their individual strengths in skilled Labor and manufacturing technologies (Gereffi and Frederick 2010; Athukorala and Ekanayake 2017). In fact, large Asian transnational manufacturing firms are becoming increasingly “strategic and pivotal” in the apparel value chain (Azmeah and Nadvi 2014, 711). Large manufacturers have networks of factories throughout and beyond their region, and are pivotal in that they can rapidly move production from country to country. The uneven power structure of the apparel value chain (in which Western brands and retailers control manufacturing through a knowledge-intensive approach) has long been a barrier for manufacturing companies in industrial upgrading (Tokatli 2013). However, manufacturing firms’ increasingly close interactions with Western brands and buyers, as well as shifts in their own consumer markets, are leading them to acquire the higher value knowledge to assist in industrial upgrading and ultimately the establishment of own-brands.

The production of fashion apparel therefore includes creative input and labor-intensive apparel manufacturing. Actors working within and across Western brands and retailers and apparel manufacturers include buyers, designers, PD teams, and garment technology and quality assurance professionals, collaboratively developing fashion products in a timely manner (Acevedo and Robertson 2012). The nature of these roles varies based on where they are in the apparel value chain, whether based within the structure of brands and retailers or within apparel manufacturing firms. Table 1 provides a summary of key roles.

Sri Lankan Export Apparel Industry Context

Major apparel companies in SL significantly contribute to the global apparel value chain (Loker 2011; Ruwanpura 2016) and to the SL economy, with 800 garment factories employing 486,300 workers (Re:source, 2019). MAS Holdings, Hirdaramani, Brandix, and Hela Clothing are leading apparel manufacturers in SL, providing quality apparel solutions — primarily activewear, sportswear and intimate apparel — for Western brands and retailers. The firms are described as excelling in manufacturing for the apparel value chain through cutting-edge technology, dedicated PD centers with fully integrated infrastructure for apparel design, construction, printing and ultra-modern bonding, dyeing, washing, finishing and other quality control services (Lanka Business Online 2016). Many manufacturers have critical backward linkages through access to high quality imported fabric and capability to

Table 1. Summary of key roles in the apparel value chain.

Role	Position in value chain	Role description
Buyer	Brands and retailers (B&R)	Buyers must source right product from right supplier for the right price to develop ranges effectively screening the product in the supply chain between the manufacturing and retailing process (Bruce and Daly 2006; Goworek et al. 2016)
Designer	B&R / Apparel Manufacturers (AM)	Fashion designers conceptualize apparel or accessories on a seasonal basis, keeping the end user or target market in mind (Springsteel 2013). The role involves bringing together market forces, creativity and innovation (Springsteel 2013).
Technical designer	B&R / AM	Liaise between design and production (Granger 2012; Springsteel 2013), ensuring all the details align with design; produce technical package, 'tech pack', providing all garment specifications; Require knowledge of garment technology, pattern design, bill of materials (or BOM), washing and finishing, quality assurance, and packaging instructions (Granger 2012); Communicate with production factories (pattern makers and merchandizers) providing the required information for sampling, while fashion designers oversee the styling and fit of a garment (Lee and Steen 2014).
Product development team member (PD)	AM	PD teams may include designers, product developers, merchandizers, sourcing staff, colorists, patternmakers and quality controllers (Granger 2012). Teams coordinate the development process from initial concepts, fabric and trim selection, design development, initial sampling until the final tech-pack is handed over for mass production (Goworek 2010; Bandinelli et al. 2013).
Garment technologist	AM	Liaise with buyers, designers and product developers to specify particular aspects of garments that suppliers manufacture (Goworek 2010), test garment samples (buttons, fabric, seams, etc.), and assess quality, safety standards and fit (Pycoc and Bowers 1996).
Merchandizers	B&R/AM	Merchandizer works with designers and other PD members to ensure the "rightness" of the merchandise – right product, price, time, quantity, place, promotion (Stone 2017).

develop and produce their own fabrics (through companies such as Brandix Textiles, Teejay, and MAS Fabric Park), threads, buttons and hangers in-house (Daily FT 2018). Global expansion of these companies — MAS's recent global expansion in Haiti and the US, Hirdaramani's international ventures in Bangladesh and recently opened factory in Ethiopia, Brandix through its international expansion in Brandix India and Bangladesh, Hela Clothing through the production facilities in Kenya, Ethiopia, and Mexico — enables the firms to strategically react to dynamic global market environments and deliver swift services through maintaining flexibility (Daily News 2017, 2016; Daily FT 2016, 2017).

As mentioned above, there are a range of roles in the apparel value chain that add value in the PD process. The export apparel industry in SL has evolved over the past twenty years to move beyond apparel assembly to offering higher value-added products and services, including design and PD. Other studies, such as Aspers (2010), have explored the changing nature of design work in apparel manufacturing; however, this has not been closely explored in a single country's industry. Although relationships between Western buyers and their suppliers in apparel manufacturing countries have been investigated from the point of view of US designers (Singh and Hodges 2011), the reverse perspective, namely from designers in manufacturing countries, has been underrepresented in research. Hence, this study has taken a particular interest in examining the SL designer's career through the primary research question of "How are the roles and careers of SL designer changing as the industry evolves?"

Methodology: Qualitative Semi-Structured Interviews

To explore this question, the study took a qualitative approach through semi-structured interviews on the evolving role of SL designers in the apparel industry. The study focused on expert professionals in fashion design and PD within four prestigious SL apparel manufacturing firms. Participants were identified through the research team's expertise and informal networks within the SL apparel industry and selected through purposive sampling to increase the credibility of the findings (Berg 2001; Bhattacharjee 2012). Eight design managers, two product-development managers, seventeen designers, and one PD merchandizer, all from different product categories, were interviewed. Each manager had more than ten years' experience in the SL apparel industry, while the designers and product developers each had more than five years' experience. Given the purpose of this article is to examine the evolving role of fashion designer in the SL apparel industry, it was important to interview individuals with different degrees of experience in order to gauge perceptions on the role's evolution.

Semi-structured interviews were conducted by the researcher at participants' workplaces during the period from July, 2016 to January, 2017 (Cohen and Crabtree 2006; Berg 2001). As this research forms part of author 1's PhD study on the wider topic of fashion industry and

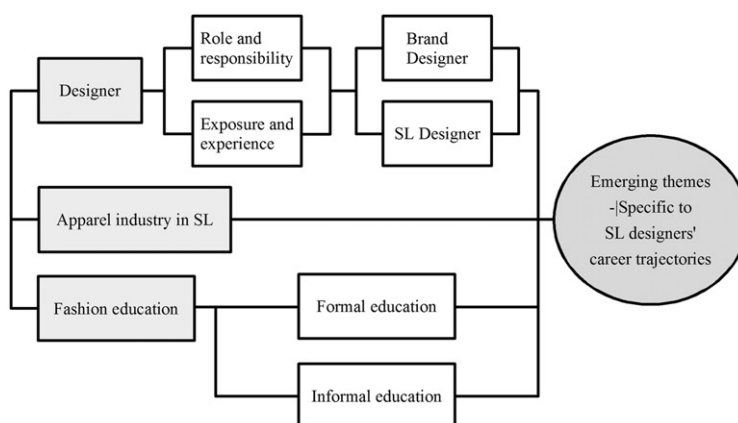


Figure 2
Code grid.

fashion education in SL, the study included predetermined questions on the participants' careers, current and past work practices, and fashion education. This paper examines interview data relating to industry experiences. Two participants who were based in New York (NY) on work abroad programs were interviewed through Skype. Upon receiving University Ethics clearances (Ethics clearance no. 1600000073), the interviews were first piloted with a small sample of three participants. Following, the remaining interviews were conducted. All interviews were audio-recorded and orthographically transcribed (Edwards and Lampert 2014). The data were then coded by the researcher (Author 1) as in Figure 2, using the interview protocol as a guide (Berg 2001). NVivo11 software was used in the process. These data were mainly analyzed using an inductive thematic approach (Braun and Clarke 2006). The code grid in Figure 2 demonstrates the overall study's sequences of themes established through analysis of the data, with this article focusing on the role of designers, and their knowledge, skills and attitudes towards their work. The second phase of analysis including coding themes emerging specific to the how interviewees perceived respective roles of Western brand designers and SL designers in the PD process. These data enabled the researchers to build a picture of current and past design processes in the SL industry to examine how the industry and designers' roles have evolved. A limitation of the study is that only SL designers and product developers were interviewed, and so perspectives from other actors in the value chain, for example, brand designers and buyers, are not included in the study. Data were manually organized into themes by Author 1 in a collaborative and iterative process, validated through expert discussions with the remaining researchers (Authors 2 and 3).

Findings and Discussion

Participants discussed their perceptions of their roles and responsibilities in the industry, including their views on fashion design practice and

their career trajectories. SL designers' careers have evolved from solely being a creative role, when fashion design was first established in the SL apparel industry, to providing more commercially driven designs today, as the industry transitions from apparel assembly to providing higher value-added product and services, including original design manufacturing (ODM) and PD. The following section traces the evolution of the SL designers' role in industry, before examining three current trajectories in the role of the designers in the SL apparel industry: 1) working within collaborative PD teams, 2) offering comprehensive fashion design services, and 3) being embedded within Western brand structures.

Evolution of the designers' role in the SL apparel industry

In the 1990s, before the design and PD processes commenced in SL, the industry operated in contract manufacturing (cut, make and trims assembly). It took time for the SL apparel industry to adapt to providing PD services, later followed by fashion design services. SL companies' strong partnerships with Western brands, and the SL apparel industry's reputation for manufacturing, assisted in them first offering PD services for Western brands beyond an apparel assembly service.

They [SL apparel companies] wanted to go beyond that [assembly] and offer incremental value for the [Western] brands that they were servicing and wanted to secure strategic partnership through providing that incremental value. So, they strengthen[ed] their PD capabilities and as a second step they have started getting into design. (Company A2, Participant DM1)

Early on, the industry employed designers to be purely creative rather than interacting with the PD teams. According to one design manager (Company B1, Participant MD1), in the early 2000s when fashion design first appeared in the SL apparel industry, the designer was an 'ornament' rather than a key player — having a fashion design team was a way to make the manufacturing firm appear dynamic and attractive to buyers, but in practice the companies did not capitalize on their new designers' skills. One participant said:

When I started as a designer, the [SL] industry was looking at more of a creative person in terms of bringing that into that value system. You would have [a] separate person who would take care of PD, [a] separate person taking care of your sourcing. (Company C1, Participant D1)

However, showcasing creativity capacity in the early days did appear to have an impact on buyers' understanding of the manufacturing firms' capabilities. Participants identified that Western buyers' perceptions of (SL) manufacturing designers changed over time, leading to changing SL

designer responsibilities. Over the subsequent 15 years, the role and responsibility of designers evolved from being ornamental to providing commercial designs within the PD process. Currently, as one design manager noted, Western buyers depend increasingly on the SL-based manufacturing designers for creative input far more than in the past:

[A] lot of fabric sourcing, even trend boards to colour predictions, everything we do now. In the past, they would share their trend boards and the market research, shop research and then we just look[ed] at that mostly and pick[ed] it up [for design]. (Company A3, Participant DM1)

Tasks undertaken by SL designers include creative tasks such as designing fashion sketches as well as creative/technical tasks such as developing tech-packs. Other responsibilities include a mix of technical, such as design of garment washing approaches and creative, such as graphics and textile print design. Being a designer in the SL apparel industry “sounds very glamorous, but it’s not glamorous at all,” according to Design manager DM1 from Company C2. In addition to the design work, they must follow up with pattern workers, sample operators, and garment technicians to realize the designs. Another design manager highlighted further tasks implicit in the designer role: “Things could go wrong ... you have to do the dye bags [preparing trial samples with garment dyeing instructions, etc.], then send those [to dyeing companies], bring it back – all of that. That requires ... patience and dedication” (Company C2, Participant DM1). One participant suggested that the current role of SL designers is approximately twenty percent creative work, in bringing new propositions to the table as a pure fashion designer, and “everything else is very multidisciplinary, industry-driven aspects of the job” (Company C1, Participant D1).

Aside from creative and technical duties, the role of SL designers further extends to bringing new business to the companies through networking with Western brands and buyers. Designers are expected to take a strategic role in the company through attracting new customers (i.e. Western brands) as much as they are expected to work on product-based tasks. One designer stated:

I started working on a new customer ... The objective of my current role is to take the brand as in the brands in C [SL apparel company] to the next level, to bring value streams into th[e] product categories that we do right now and expand the business. My task for the next year is taking the business from the numbers of sales and improv[ing] it almost twice [over]. (Company C1, Participant D1)

The role of the designer has therefore evolved in the SL industry to provide front-end services such as marketing and presentation.

According to the participants, designers are often the main points of communication with Western buyers and designers. These relationships are highlighted by the participants: “Last week we had a visit [Western buyers visiting the SL company] and they were so thrilled, [they] said [they] never got that range from anybody else” (Company C1, Participant D3). Participants said that the novelty SL designers bring to their collections makes them special and this is helpful in developing mutual understanding with Western brands and buyers, ultimately assisting in bringing new business to the SL industry. The SL apparel companies set designers’ goals based on the money they generate: “The designers are monitored on the[ir] success through [the] quantity of confirmed orders into the dollar value. Each designer has a dollar value behind them” (Company B2, Participant DM2).

For SL design managers, their strategic role within the company is even greater. SL design managers guide junior designers, helping with prioritizing tasks to achieve seasonal collections, and overseeing PD for different Western brands and buyers. One assistant design manager noted, “We have [a] vast number of customers that we have to cater to each season” (Company B2, Participant D2). Managers may also have to pitch in and contribute to the projects or collections developed by junior designers, depending on the amount of work coming in and the stress levels of each designer. In addition, design managers are required to coordinate and conduct meetings with different categories of people (such as Western buyers and designers, SL suppliers, merchandizers, sample room individuals) and make strategic decisions on seasonal collections, “attending several meetings, and also travel [visiting Western brands and buyers] comes in between” (Company B2, Participant D2). Design manager DM1 from Company B1 noted that training designers involves sending them across satellite companies (some overseas, e.g. Bangladesh or India), exposing them to Western brands, buyers, consumer culture and lifestyle, and training them to ensure they are aligned to apparel value chain needs.

Offering a comprehensive fashion design service

Western brand designers often conceptualize apparel collections on a seasonal basis for a target market segment. Their roles have specific responsibilities and are sub-divided based on the contribution they make in the design process. As one participant noted of brand designer roles, “There are two categories. Fashion designer[s] just give the sketch [design]. And technical designer[s] decide on how to do it. They have pattern knowledge” (Company C1, Participant D3). However, technical designers from Western brands sometimes have less technical knowledge than the SL designers who are embedded in the manufacturing culture.

One design manager outlined the responsibilities taken by the design team from design sketch to dispatching the final samples for Western buyers: “It’s up to my team to understand the design brief given by

customer[s] [Western brands and retailers], work through sketch and swatch, offer final garments, that will then be signed off and bought at the correct price” (Company *B2*, Participant *DM2*). Some Western brands and designers take a collaborative approach in design, working cooperatively with SL teams. However, often the design guidelines are provided by the Western brand designer or buyers, or SL designers have to follow the brand signatures as they design collections:

It actually depends on [the] customers [Western brands and buyers]. We [SL designers] are working for different [Western] brands; some brands want us to work regularly with them. They want us to sit with their [brand] designers. Collaboratively, we have to work and come up with our own collections. Sometimes, some brands, they visit us twice a year. So, we have to prepare for those customer visits and we have to prepare our collections. Sometimes, they give us their design deck [brief]. We have to work based on their design work. Sometimes, some customers do not share anything with us. We have to come up with [it] all. (Company *D1*, Participant *D1*)

Participant *DM1*, Company *B1*, noted that the main task of SL design teams is working on program-based collections as well as seasonal collections (based on Western designers' tech-packs) for key customers (Western brands and retailers) who expect designs from SL. Some Western brands and designers expect a full-package service — meaning design concept to final product support — from SL designers, irrespective of what they develop. SL designers provide comprehensive design services, while the brand designers help with some critical aspects of manufacturing, such as size and fit approvals. SL designers' technical strengths are highly regarded in this context. As participants noted:

They want our input. For *B26* [US-based online brand], we have to do A to Z. Fabric sourcing to design; everything. Every two month[s] they are launching a new collection. We have to give them a full activewear range for men's, women's and kids, boys and girls, and [a] full range of lounge wear. We have to do the tech-pack to the sample, fit approval; they support us. (Company *C1*, Participant *D3*)

Relatedly, another participant argued the SL designers are often the technical experts:

B35 [US-based brand] is a customer who has started swimwear very recently. What they want is, since we [SL designers] are pioneer[s] in the industry, they want us to come up with ideas and designs, rather than they [*B53*] are giving ideas for us, you come up with your ideas because you are the expert [in technical

as well as creative]. We can give cost options. Anyway, they would do their initial design. But when it comes to [the] technical side we are strong. Aesthetically they are strong. But some of their designs are not practical sometimes and not production feasible. We are more technically sounded, because we work very close[ly] with the PDC. (Company A3, Participant D1)

Nonetheless, some Western brands and buyers, knowing the technical strengths of SL designers, require design research from SL designers to obtain different perspectives. One design manager said:

Most of the people [Western brands, designers and buyers] are not like that; they would at least like to see our techniques [and] some want to see the whole package. Some brands tell us to send our trend, mood boards ... do presentations twice a year. (Company A3, Participant DM1)

Participants noted that their design process starts with research on seasonal trends, fabric, color, silhouettes, construction, consumers markets, and competitive brands analysis. Designers interact with the SL apparel industry and Western fashion world in various ways during this process. Idea generation is the second stage of design, where the initial design ideas are created and sketched in illustrations. The interesting ideas are selected and refined. The most important stage is defining the material bases, trims, color combinations, print and embellishments for sketches while relating to the constructions: "That's how we basically refine product concepts" (Company A2, Participant DM1). Another designer says, "I have to [do] research on the market, research on the consumer, do initial sketches and initial designs, initial concepts and get the approval from the internal teams and finalize some products for sampling" (Company A2, Participant D1).

Participant DM1 from Company B2 explains what happens next: "We then get into a stage called tech-pack generation, which is basically doing a technical definition of the product concept." Once the product is defined, the designers connect with the rest of the organization to convert designs into physical prototypes. A technical handover meeting is held, in which the designers reach out to the front-end merchandizing team responsible for design realization and commercialization for Western brands and retailers. Discussions on feasibility and costs occur at this stage, and the tech-pack is shared among the team for sampling. However, as one designer said, producing the tech-pack and passing it on does not conclude their job. "The technical part [sampling], printing ... it's a different thing" (Company A2, Participant D1). Attending fitting sessions prior to presenting a sample is crucial to determining the outcome of the design sketch, so there is designer engagement in the process from initial design sketch through to sample development up to dispatching the sample.

SL designers are adding novelty to designs through product improvements (value additions) and process improvements (technical developments), thus showcasing SL industry strengths: “We [SL design team] have to come up with our own collections for different brands. That’s basically doing new collections and showing our capabilities to brands” (Company *D1*, Participant *D1*). The designs are presented in sample form to Western buyers and designers on their visits to SL or sent to their design houses with trend directions for their selection.

We do collections... B30 [US-based brand] do have their own designers doing their seasonal collections. They are picking our styles [SL designs] also. They are very positive [about] our designs and it’s very easy to work with them. We just send them the design research including trends. They pick some ideas and they give us the orders. (Company *C1*, Participant *D3*)

According to one design manager, “[I]nnovation is a huge area ... right now. Probably one of the biggest key areas. The designers work very closely with the innovations teams. Come up with newness. Giving it to the [Western] brands” (Company *A3*, Participant *DM1*).

Developing collections for Western brands requires SL designers to have a better understanding of the brands’ product categories when the brands have a number of product ranges. “The woven business is a completely different animal. [The] product is different. Value addition is completely different. So the angle of how you approach design is different” (Company *B1*, Participant *DM1*). Such differences must be well observed by the designers. One SL designer said:

They have two categories, B7 [US-based brand], lounge and fashion. B7 fashion is into very fast fashion. The lounge is not a seasonal base but kind of innovations. First you start with fashion. I did couple of seasonal researches and seasonal presentations; then I moved to lounge. It’s about understanding ... lounge is [a] little bit complicated. (Company *A2*, Participant *D1*)

When providing a full-package service, SL designers must therefore have insight into the brand identity, philosophy, heritage and strategies that they are working for. Their technical proficiencies are valued by Western brands and retailers, but the designers are responsible for being in tune with consumer culture and lifestyles. For SL designers, working closely with brand designers is an important way to gain this insight.

Closeness to Western brand structures

The major SL apparel companies can afford to place their designers close to Western brand structures, either by placing them in brand

design houses or by having the designers placed in their own overseas offices. “I have almost one year [of] experience working with B3 [US-based brand] designers. I do not work for B3 directly. I am based in New York and work together with them and grabbing their ideas” (Company B1, Participant D3). Another designer based in an overseas office of a SL company indicated, “I am actually a senior designer [based in New York] to C [SL Company]. My job role is more like a design consultant role” (Company C1, Participant D2). Their roles are primarily to provide technical consultancy for Western brands and design consultancy for SL design teams.

The purpose of this approach is to create swift communication channels between Western brands and retailers, and SL companies and design teams: a New York-based SL designer said, “My job role itself is to get updated and share with my team” (Company C1, Participant D2). These SL designers based in Western brand structures are exposed to Western fashion consumer culture and lifestyle and are able to conduct brand, consumer and trend research more quickly and to share with SL design and PD teams. “I do lots of store visits; [which] can be competitor[s] store[s] or ... even [a] totally irrelevant store, but that’s how I learn the product. It’s [a] very personal thing. I go out, touch and feel; it’s not the Internet” (Company C1, Participant D2). “Often I visit retail stores. I can understand the customer and the market and what’s happening here — the new trends. Likewise, I participate in textile shows” (Company B1, Participant D3). Easy access and frequent travels to fashion cities is another advantage that the SL designers gain by being based in Western brand structures, thus they better understand the vast array of global fashion consumers and fashion trends:

I travel a lot workwise, trade shows. I travel to Europe, Paris at least once a year. That’s one of the biggest investment[s]; by traveling I learnt a lot as a designer. The customer cultures, the art that we see i[s] just really helpful. (Company C1, Participant D2).

Quick response to fast fashion is one of the major advantages of this approach. The designers are able to “grab” trend directions and work with SL teams to swiftly get the products to market. As one designer based in NY said:

What I do is kind of “shop copy.” When you know what customer[s] [Western brands] want, where my value addition comes in is I have a team back in SL. I work in parallel to the design team in [the Western] brand plus I work ahead to the brand ... if I see something new ... when I walk into the street [in NY] or I go to a store or when I read an article ... as an example the reversible pant came into the trend. Reversible legging[s]. So when it was coming to the market we just wanted

to add that and develop it ahead ... I started working with the team and we got the fabric and we got the programme [order]. (Company C1, Participant D2)

This designer further noted that the role involves closer market reading to support the SL team: "It's like not sitting and sketching. Parallel to that we look at all sort[s] of market insight[s], intelligence ... [S]ometimes leggings are not doing well now. Fleece bottoms are not doing well. We just prepare for everything" (Company C1, Participant D2). Market intelligence coupled with technical excellence provides opportunities for the SL industry to work in advance on reengineering products even before the Western brands and buyers anticipate the need, and thus fast-track the business. A designer based in NY said:

It's the volume business. We can't actually miss anything. Most of the time what we do is product engineering/cost options. We look at a product and we engineer that and margins are very tight. So, we have to be very creative to give some ideas as cost saving options. I work very closely with [the] PD team back in SL. I share [with] them insights and whatever we are coming up with as new ideas that I share with [the] brand design team. (Company C1, Participant D2)

Brand design houses also benefit from this setup through the SL designers' technical knowledge. The SL designer noted:

I give them [Western brand designers] knowledge as to what's happening in the technical side — what exactly happens when it comes to manufacturing a garment ... Sometimes, they don't understand what a wash is, what a wood print technique is ... I am updating them ... I also need to give them design knowledge — it may be sketching, washing, fabric, embellishment — all those need to be covered. If we give them more, we can get more [business]. (Company B1, Participant D3)

The more the SL designer is able to collaborate with brand design collections, the more they are exposed to brand identity, philosophy, heritage and strategies, thus increasing the chances of the SL company gaining business. "We regularly meet the [Western] buyers and the designers ... [W]hen someone [SL designer] is overseas and very close to the [Western] buyers and designers, we know what exactly they [Western brands] want, what's happening here [in brands], what they need from overseas [manufacturing] designers" (Company B1, Participant D3). A designer based in a NY brand design house revealed, "I do designs for B3 [US-based brand]. For instance, I did a collection for them for Fall 17, more than 75 percent, I did my designs for B3" (Company B1, Participant D3). This

also enables SL designers to incorporate SL production capabilities into the collections. This strategic positioning of SL designers in Western brand structures promotes the capabilities of SL manufacturing firms.

B [SL apparel company] is the bottom vendor for B3 [US-based brand]. All the woven bottoms come to *B*. I did most of the woven bottoms for their range. As well as [this], I did a couple of ... sketches for other vendors also — not only *B*. Those sketches go [for manufacturing] to some other countries like Vietnam. (Company *B1*, Participant D3)

As this designer revealed, there are better chances of growing up with brand design teams that enable learning opportunities, “It’s kind of [a] learning method that I am doing here. I am always learning from B3 [US-based brand] designers. I am not that expert person. I always grab their ideas and how they work and how they design” (Company *B1*, Participant D3).

The designer stated that this approach is an initiative to promote vendor (manufacturer)-based designs, as Western brands and retailers are restructuring their teams to be cost effective.

The vendor [manufacturer] based design means it benefits the [Western] buyers. It’s a benefit for the brand. There’s so much money invested in the [Western brand] design team. They are planning to cut down that expense and get the vendors to come up with ranges. (Company *B1*, Participant D3)

Another way that SL designers become closer to brand designers is through the PD service centers that a number of SL apparel manufacturers have established within SL. One designer noted that implementing fully equipped PD centers with all the facilities under one roof (even including lodging for visiting Western buyers and designers) allowed SL designers and Western brand designers to collaboratively develop their design ideas and develop products, and thereby eliminate obstacles (e.g. communication, lead time) that can arise if they work remotely. These strategically developed infrastructures in the SL industry blur the boundaries between Western design and SL manufacturing teams, as manufacturing (SL) designers are able to take greater ownership of design and PD decisions, and collaborate increasingly with Western brand designers on site to offer PD services, as well as a full-package service — a strategy that influences the Western brands to integrate garment manufacturing techniques and finishes that are areas of strength in SL firms. Therefore, remaining competitive as the first choice of manufacturer for the Western brand. According to a designer:

They [Western brands and buyers] send us tech-pack[s] visualising the concept. Based on that, at our PD centre, we manufacture a

garment [sample]. That's sort of a concept garment. They come [to SL] to review that and they amend it; do another set of samples on site. So, they don't have to go to [the] US and wait for our samples. Everything is built in here. They can stay close to the facility ... let's say, for one week. They can come and go by seeing the progress of the products ... It will reduce the lead time ... and it will straighten interaction between us and the client ... [W]e used to be just garment makers, but now they call it like we are their strategic partners. If you look at this [premise], all the facilities are here. (Company A1, Participant D1)

A design manager heading up a team must ensure that the sample development and PD processes are running smoothly, even though these are not direct functions of design. Market intelligence is also required for a design managerial role in which brands' sales data is considered strategically, as Participant DM1, Company B1, highlighted. One challenging aspect of a managerial role in design is managing people to meet departmental expectations through inter-departmental alignment, especially when dealing with people who have a factory mentality (i.e. those who have technical knowledge but not a creative approach), as the design manager noted.

SL designer career trajectories

The participants' views of the SL apparel industry's design process, the evolution of the SL designer's career, and the nature of the service they provide for Western brands and buyers, are illustrated below in Figure 3. Arrowheads indicate the direction of their service flow in the apparel value chain. The dotted arrow represents industry transition.

Our findings indicated three main approaches to design: 1) SL apparel industry PD service, in which the SL designers work with the brand designer collections, providing cost effective and production

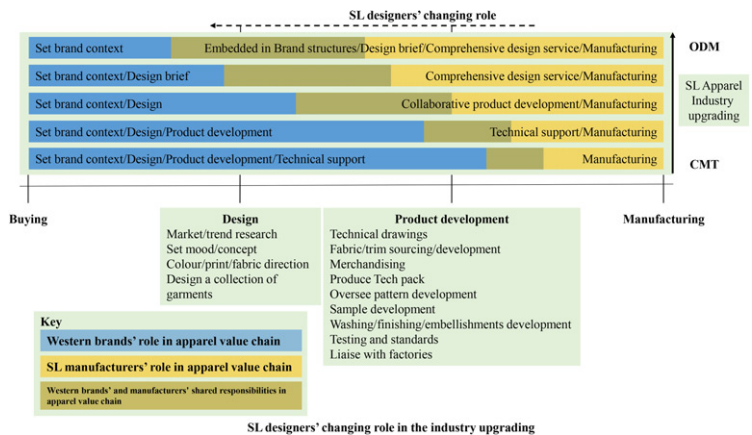


Figure 3
SL designers' changing role in the industry upgrading.

feasible reengineered design options, as well as fabric, garment finishing and washing, embellishments and developments, to integrate with brand designer collections. The advantage of this process is it strategically influences Western brands to offer manufacturing to the respective SL firms where the PD is carried out; 2) SL apparel industry comprehensive fashion design service, where the SL designers work on concept to final PD for their own collections (and Western brands often brief for these collections); and 3) SL designers based in Western brand structures provide design guidance to SL design teams, and technical guidance for Western brands and buyers through the establishment of dedicated PD centers. These three approaches have been vital in strengthening design capabilities in the SL industry.

Conclusion

The SL designers' roles and responsibilities have evolved in accordance with apparel industry transition from apparel assembly to providing higher value-added services, shifting from creative designing to producing commercially viable designs. The industry has been able to develop credible relationships with Western brands and buyers in the transition process, and SL designers have been able to work closely with Western brand designers and buyers, irrespective of where they are placed in the apparel value chain. The closer the relationship between SL designers and Western brands, designers and buyers, the easier it becomes to understand their requirements and swiftly respond to their needs, and hence to expand business opportunities. The SL designers' roles and responsibilities are multidisciplinary, working with internal and external teams, and with Western brands, designers and buyers.

The design practices of SL designers identified in this study inform their roles and responsibilities, providing comprehensive design and PD services, subject to technical and commercial restrictions, while the industry upgrades from apparel assembly to providing higher value products and services. Strategic decisions that have positioned SL designers closer to Western brand structures have been vital in this process. SL, although a relatively small producer in its region, has been well placed to act as a bridge between Western brands and the manufacturing regions of South Asia, and the current model has provided a valuable pathway for SL designers' career development individually and for the country's sector as a whole. Looking to the future, however, changing trends in sourcing coupled with changing consumption levels in other parts of the world may require further shifts again for the SL industry. A recent McKinsey report (Andersson et al. 2018) highlights a growing trend observable in Western countries of a return to local production enabled by advances in automation. Related trends in near shoring are occurring in Europe and the US in which apparel production is relocating to countries close by for better responsiveness (Andersson et al. 2018). These trends may lead to pronounced re- and near shoring

of apparel manufacturing in the West, and a decline in offshoring production to Asia. Despite this trend, the investment in technical innovation in SL will likely see continued partnerships in research and development between multinational brands and SL manufacturing firms. A recent example is the success of MAS Holdings' innovation arm T winery in developing wearable textile technologies (Binns 2018). Alongside, another trend sees consumption patterns shifting in Asia, with a rapidly growing consumer middle-class. Therefore, as consumer markets grow in South Asia, SL firms may continue evolving to further develop own brands for markets in their region. SL designers will no doubt continue to play a vital role in the next stage of industry transition.

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ORCID

Sumith Gopura  <https://orcid.org/0000-0003-0442-9173>

Alice Payne  <https://orcid.org/0000-0002-1570-6378>

Laurie Buys  <https://orcid.org/0000-0001-8917-0863>

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