



IT'S TIME FOR A FASHION REVOLUTION

**WHITE PAPER
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CREDITS

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EXECUTIVE SUMMARY

It has been more than two years since the Rana Plaza factory collapse killed and injured thousands of garment workers, people who were making clothing for dozens of multinational brands and retailers.

In the two years since this tragedy, tens of thousands of people have taken to social media, to the streets, to their schools and to halls of government to uncover the stories behind the things we wear. We are Fashion Revolution. We want to understand and demolish exploitation in the fashion industry.

However, most of the public is still not aware that human and environmental abuses are endemic across the fashion industry and that what they're wearing could have been made in an exploitative way. We don't want to wear that story anymore. We want to see fashion become a force for good.

This white paper is for people who don't know that much about the human rights and environmental issues behind fashion but want to know more. It is for those who may have participated in the [#whomademyclothes](#) hashtag campaign but want to dig a bit deeper. This paper is intended to be diagnostic, setting out why a fashion revolution is needed now.

This paper aims to contextualise Fashion Revolution's efforts. We hope it helps you better understand what Fashion Revolution is, our philosophy, what sort of change we expect to see, and what we're asking the public, the industry and other stakeholders to do about it.

WHY DO WE NEED A FASHION REVOLUTION?

On 24 April 2013, over 1,130 people were killed when the Rana Plaza factory complex collapsed in Dhaka, Bangladesh. 2,500 more were injured. The people crushed under those eight floors were working for familiar fashion brands in one of the many negligent accidents that plague the garment industry.

Fashion Revolution was born on the day that Rana Plaza collapsed. This disaster acted as a metaphorical call to arms. 1,130 is too many people to lose from the planet in one factory, on one terrible day without that standing for something. We believe that the cost of fashion shouldn't be someone's life. We mustn't allow tragedies like Rana Plaza to remain an unfortunate reality of contemporary life. Today, both people and the environment are still suffering as a result of how fashion is made, sourced and purchased. We believe enough is enough.

Though the Rana Plaza disaster is no longer on the front pages of the news or at the forefront of our minds, we believe it has opened up a window for significant change in the industry. Whilst this tragedy is a symptom of industry-wide problems, it gives us an opportunity to set a new agenda to overcome the causes. The public must be part of setting this new agenda for the fashion industry. However, change will need to come from multiple angles – business, consumers, governments, academia, NGOs and others coming together to create a safer, cleaner, more just and fair future for fashion.

Before we set out what changes need to happen, let us first look broadly at the way in which our clothing is made today, how it came to be made in this manner and what big problems have resulted from the way the fashion industry works.

We wanted to put a wide lens on the issues below, so you have an overview of what we're talking about when we say we need a fashion revolution. Though, of course, this doesn't cover everything. There are many organisations that have been working on these issues for years and have made some important in-roads into improving conditions and solving some of the problems that the fashion industry faces. There is also a long list of multi-stakeholder groups and government interventions that have paved the way for Fashion Revolution's work, without which it would be impossible to contextualise the Rana Plaza disaster, many of which you will find listed at the end of this paper.

The Rana Plaza disaster acted as a metaphorical call to arms.



MODEL: *THE BUSINESS OF FASHION*

Fashion is our chosen skin. On an individual level it represents how we feel about ourselves and what we want to tell the world about who we are. On a community level, it tells a story about our history, culture and social customs.

We have worn clothing pretty much from the beginning of time, but fashion was not always made and consumed the way it is now. Mass-produced clothing has existed since the mid nineteenth century and working conditions have been a problem for well over a hundred years. The term 'sweatshop' was coined as early as the 1850's. The Triangle Shirtwaist Factory fire in 1911 was the deadliest industrial disaster of its time, killing 123 women and 23 men in Manhattan, New York City. Mill fires in the UK were so common that mill owners often had their own steam fire engines.

However, the way fashion is produced and consumed has been dramatically scaled and sped up in the last 20-30 years and so too we have seen more frequent and deadlier factory disasters.

Clothing in the earliest days would have been made-to-order by local tailors and sold through trunk shows to aristocratic clients. Later luxury fashion design would be shown on the catwalk across a few major urban centres, still produced locally and on a relatively small scale. Consumer culture was ushered in around the 1950's. In 1973 the U.S and other countries set up a quota system to limit the amount of textile and apparel imports from specific countries.

However, it drove up domestic manufacturing costs and production began moving abroad. By the mid 1970's many brands, some of which are now the world's biggest retailers, began rapidly copying catwalk styles, producing them for much less and having them on shopping rails within weeks. 'Fast fashion' gained steam throughout the 1980s, and some heralded it as the 'democratisation of fashion.' What once seemed exclusive to a few was made accessible to most. The majority of the market moved in this direction.

In 2005, the quota system was eliminated and replaced by a World Trade Organisation agreement that effectively opened the floodgates to outsource abroad. By the mid 2000s, fashion had become a huge global business with production constantly moving to countries that offered the lowest wages, the least regulation and the least protections for workers and the environment in order to keep up the system of producing more for less as quickly as possible. This is the case not just for the high street but for luxury fashion too.

Fast forward to today and the fashion industry is now one of the most influential sectors, both in terms of financial power and how it shapes wider trends, beliefs, attitudes, behaviours, identity and culture. The global fashion industry (which includes clothing, textiles, footwear and luxury goods) is worth an estimated \$3 trillion (Companies & Markets, 2013), and according to McKinsey (2015) has 'outperformed the overall market and every other sector across geographies for more than a decade' – more profitable than even high-growth sectors like technology and telecommunications.

As a result of fashion's growing importance to the global economy, garment manufacturing has become the world's third-biggest industrial industry – behind only automotive and electronics manufacturing (Financial Post, June 2014).

Fashion is now one of the most labour intensive industries, directly employing at least 60 million people (ILO 2015) and likely more than double that indirectly dependent on the sector – an estimated 80 million in China alone (ODI, 2008). Handicraft artisan production is attributed as the second largest employer across developing countries, counting some 34 million handicraft artisans just in India. (Alliance for Artisan Enterprise, 2014; Business of Fashion, 2014). Women represent the overwhelming majority of today's garment workers and artisans.

There are also millions of farmers, dyers, knitters, weavers, and myriad others involved in the production and sale of clothing. Fairtrade Foundation estimates that as many as 100 million households are directly engaged in cotton production and that 300 million people work in the cotton sector in total (when you count family labour, farm labour and workers in related services such as transportation, ginning, baling and storage).

For the past decade, apparel companies have seen rising costs, driven by rising labour, raw material and energy prices. Yet despite the higher cost of making clothing, the price consumers pay is cheaper than ever before. This is why production is regularly shifted to lower cost countries (McKinsey 2015). World Trade Organisation statistics (2014) tell us that China is now the biggest textile and apparel exporter followed by European Union countries then India, Turkey, Bangladesh, United States, Vietnam, Korea, Pakistan and Indonesia respectively.

We now face a system of fashion business that is broken. It fundamentally operates in an unsustainable way and cannot carry on business as usual. We cannot keep chasing the cheapest labour and exploiting natural resources forever. Eventually, they will run out.

However, writer and radio journalist Kurt Anderson writes about the history of fashion in Vanity Fair: 'I've been a big believer in historical pendulum swings—American sociopolitical cycles tend to last, according to historians, about 30 years.' So maybe the time for a fashion revolution really is now. We've seen thirty years of rapid development and now it may be time for a different model.

The fashion industry fundamentally operates in an unsustainable way and cannot carry on business as usual.

MATERIAL: PEOPLE AND PLANET

HUMAN RIGHTS AND WORKING CONDITIONS

Despite a number of international standards, certifications and government legislation to tackle human rights, working conditions are not up to scratch in many of the places where clothing, accessories and footwear is made. Systematic exploitation remains rife. Human rights violations include cross cutting issues such as forced and child labour, repression and discrimination, and unsafe, dirty and unfair working conditions.

Producers and garment workers might face excessive hours, forced overtime, lack of job security, denial of trade union rights, poor health, exhaustion, sexual harassment, discrimination and denial of other basic human rights when on the job. These problems exist not just in places like Bangladesh but also in developed countries like the United Kingdom and the United States.

Thanks to the pioneering work of international NGOs and unions like Better Work, CARE, Clean Clothes Campaign, Fair Wear Foundation, Fairtrade International, IndustriALL, Labour Behind the Label, Oxfam, TRAIID, Traidcraft, War on Want and many others dedicated to improving the garment industry, human rights issues are more visible and better understood than ever before. These organisations have made significant in-roads into improving conditions for many of the world's producers.

However, the harsh reality remains that basic healthy and safety measures do not exist for huge numbers of people working in fashion's supply chains. The Rana Plaza factory collapse is the most extreme and familiar example. Since Rana Plaza, the Bangladesh Accord, set up to improve factory

conditions, has inspected over 1200 factories for safety hazards and as a result has closed 41 and helped to upgrade many others. But this is just one country where our clothing is made.

There are many other human rights abuses at play in fashion's supply chains. For example, Labour Behind the Label has found that mass fainting of garment workers in Cambodia is due to malnutrition. The International Labor Organisation (ILO) finds that women are most often, but not exclusively, the target of sexual harassment. Better Work data shows that men are three times more likely than women to be supervisors. Women are less likely to be promoted, receive training or become a union leader.

36 million people are living in modern slavery today, many of who are working in the supply chains of Western brands.

According to the ILO, there are 215 million children working throughout the world, many full-time. Of these, 115 million are exposed to hazardous forms of child labour. In Maplecroft's Child Labour Index, India ranked 1st with over 14 million children in work, mainly in textiles. Their research underlines the fact that the issue of child labour is often symptomatic of a range of underlying structural problems in a country, including poverty and a lack of access to education.

In fact, the Global Slavery Index estimates that 36 million people are living in modern slavery today, many of who are working in the supply chains of Western brands. According to Maplecroft's tenth annual Human Rights Risk Atlas, 49 countries are characterised as 'extreme risk' in the Forced Labour Index, which features many of the world's emerging (and textile/garment producing) economies. These include China, India, Mexico, Thailand, Indonesia, Colombia, Vietnam, Bangladesh and the Philippines. There have been diverse forms of bonded labour and deliberately hidden subcontracting (where conditions are unregulated) for a decades. These things are endemic across the industry, but certainly more visible today than in previous decades.

"Companies cannot rely on robust governance and remedy structures in these markets, which means the onus is on them directly to implement appropriate levels of due diligence and mitigating action," said Lizabeth Campbell, head of societal risk and human rights at Maplecroft.

However, the Behind the Barcode report (April 2015) found that of 219 brands surveyed, 91% didn't have full knowledge of where their cotton is coming from, 75% do not know the source of all their fabrics and inputs and only half actually trace where their products are cut and sewn. Of 51 leading brands in the UK, 71% believe there is a likelihood of modern slavery occurring at some stage of their supply chains (Ashridge, Hult and Ethical Trading Initiative, 2015).

If companies don't know how and where their clothes are made, then there is no way for them to ensure that human rights are protected in their supply chains.



In Guangdong in China young women face 150 hours of overtime each month. 60% have no contract, 90% no access to social insurance.

Fashion Revolution believes that transparency and due diligence go hand-in-hand when tackling the human rights issues that hide behind our clothing. If we can't see it or refuse to look at it, we can't fix it.

These are just a few illustrative examples of the human rights abuses prevalent across the fashion industry. We suggest looking at the organisations mentioned above and linked to at the end of this report for further research and more detailed information about what's already being done to tackle these issues and what more you can do to get involved.

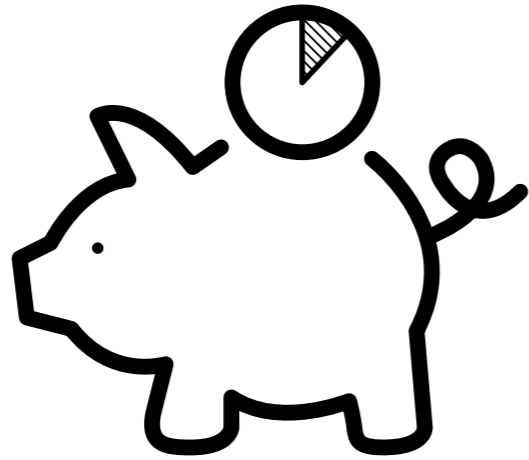
WAGES

The legal minimum wage in most garment-producing countries is rarely enough for a worker to live on. It is estimated that the current minimum wage in Bangladesh still only covers 60% of the cost of living in a slum. In Cambodia and China the minimum wage would need to be at least twice as high to cover the basic cost of living.

According to the Clean Clothes Campaign, in the Cambodian garment industry over 80% of workers are women, aged 18–35. In India, Bangladesh and across Asia, most garment workers are women. Many of these women have children and families to provide for and no other income earners in the family to contribute. One worker's salary typically supports at least three people in a family. Not only do low wages keep garment workers in a cycle of poverty, but they also add to the pressure to work long overtime hours which impacts on health and safety, as well as on productivity.

In the Labour Behind the Label report Tailored Wages (March 2014) just four of 40 leading international clothing brands were able to demonstrate work they were doing towards paying a living wage (which is enough to maintain a normal standard of living wherever it is you are located.) Brands who are doing little or no work towards a living wage included: Aldi, Debenhams, Esprit, Gucci, Mango, Matalan, Pentland (incl. Speedo, Hunter), VF Corporation (incl. Lee, Wrangler, The North Face, Timberland) and Versace.

At Fashion Question Time, organised by Fashion Revolution in the Houses of Parliament on 26 February 2015, Jenny Holdcroft, Policy Director at IndustriALL Global Union said: "I think it's clear that the brands that have driven this sort of sourcing model have not paid any attention to wages... The factory owners who also want to make a profit out of this want to see where they can squeeze. Often they can't squeeze the materials because the brand can specify what the materials are and where they come from, they can't squeeze on overhead costs like rent, electricity, taxes. So where does the squeeze come? There's really only two areas: their own profit margin or workers' wages. And this is not something that the brands have ever really unpacked."



A survey of 91 fashion brands found that only 12% could demonstrate any action at all towards paying wages to garment workers above the legal minimum.

The Behind the Barcode report (April 2015) found that just 12% of 219 popular fashion brands surveyed could demonstrate any action at all towards paying wages above the legal minimum and, even then, only for part of their supply chain.

Some brands are putting the microscope on the price they pay for a garment, but very few. Patagonia, for example, tracks the minimum, average and living wage rates for all of its garment factories to ensure that in its costing formula the cost of labour is close to or meets the living wage.

Plus, there's evidence that paying a living wage is good for business. A 2014 KPMG survey found that 40% of consumers would switch their loyalty to another company if their favourite brand didn't pay a living wage. This is why transparency is essential. People can only make an informed decision as to where they want to shop if information about which brands and retailers are paying a living wage is out in the open. A fashion revolution is needed because the brands, even the best of the brands that are working most proactively towards a living wage, cannot change the system alone.

WASTE

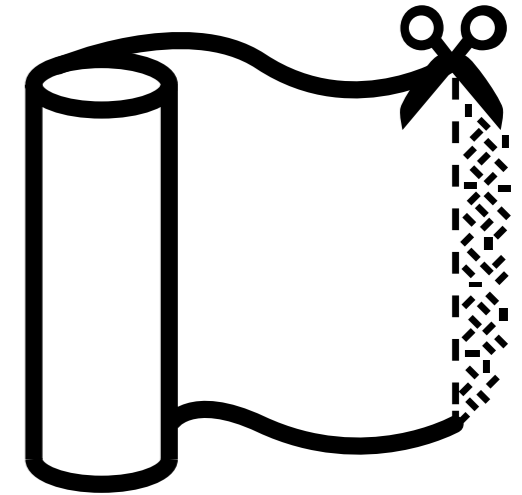
Waste is going to be one of the next biggest problems for the fashion and textiles industry. Last year the worldwide consumption of textiles reached about 73 million tonnes and is expected to grow at nearly 4% annually through 2025 (APIC 2014), yet only 20% of textiles are recycled each year around the world (Soex presentation at Textile Exchange conference 2014).

Textile waste is generally categorised into two different types:

- 1) **Pre-consumer**; the leftover materials from the production of clothing; and
- 2) **Post-consumer**; what is discarded by consumers after use.

It is estimated that a single textile mill can produce from 5% up to 25% of pre-consumer textile waste on its total yearly production. Over-production runs and liability stock from manufacturers and mills are often absorbed by the local market or sold via third parties. Damaged clothing and discarded rolls of branded and/or recognisable fabrics are regularly slashed, landfilled and incinerated to protect intellectual property and brand image. This reality is hidden. Investigative reporters have tried and failed to find out what really happens with pre-consumer waste.

In the UK, roughly two million tonnes of clothing and textiles are thrown away every year and only 16% of that waste is ever reused. That's roughly £140 million worth of waste. Meanwhile, 80% of textile waste going to landfills can actually be reused (WRAP, 2015). Of the clothing donated to charity in the UK, only 10–30% is actually re-sold; the rest is exported overseas. In Uganda, some 81% of all clothes sold today are cast-offs from the west. It has been widely reported that this influx of second hand clothing to developing countries is destroying local textile and tailoring economies (BBC News, 2015).



It is estimated that we make 400 billion m² of textiles annually. 60 billion m² is cutting room floor waste.

Meanwhile, every ton of discarded textiles reused saves 20 tonnes of CO₂ from entering the atmosphere and every 1,000 tonnes of used textiles collected is said to create about 7 full time jobs and 15 indirect jobs.

Textile landfill bans may come into play in Europe in the near future (Oakdene Collins 2013). In France, companies are now responsible by law for managing the recycling of their products at the end of their usage. Plus, we're already seeing many big brands like H&M and Marks & Spencer putting clothing collection points in-store.

We need to better understand the implications of producing and consuming so much, and what effect this waste has on the environment, communities and the economy.

WATER, CHEMICALS AND CARBON

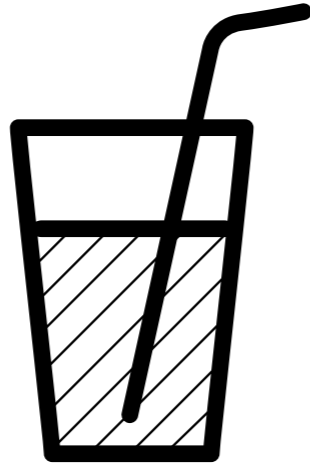
Fashion is also a thirsty business. Cotton accounts for 90% of all natural fibres used in the textile industry and is used in 40% of apparel produced globally. Growing it requires a lot of water. One cotton shirt uses about 2,700 litres of water (WWF, 2013). The Aral Sea has shrunk to just 10% of its former volume, due in part to conventional cotton farming.

17–20% of industrial water pollution comes from textile dyeing and treatment and an estimated 8,000 synthetic chemicals are used throughout the world to turn raw materials into textiles, many of which will be released into freshwater sources. (The Guardian, 2012).

Even if wastewater has been treated, residual chemicals from the dyeing process can continue to be present in water supplies. These residues can be carcinogenic, toxic, mutagenic and have detrimental effects upon human reproductive systems. A huge amount of water is also used in the wet processing of clothes, such as dyeing and washing.

Washing detergents can contain phosphates, which lower the water quality and lead to increased algae growth. The European Union has therefore begun to ban phosphates used in detergents. However, the substances that are regulated or banned in the EU and U.S. still find their way into stores via outsourcing to developing economies where production and use of some potentially dangerous substances are less likely to be regulated.

The chemicals used in pesticides are another source of concern. According to the Pesticide Action Network, non-organic cotton uses 22.5% of the world's insecticides and 10% of all pesticides, on 2.5% of the world's agricultural land. 1–3% of agricultural workers worldwide suffer from acute pesticide poisoning with at least one million requiring hospitalisation each year, according to the FAO, UNEP and WHO.



It takes 2,720 litres of water to make a t-shirt. That's how much we normally drink over a 3 year period.

The Carbon Trust reports that clothing accounts for around 3% of global production of CO₂ emissions, this includes both production and use phases. Around half of these emissions occur whilst clothing is being worn, washed, tumble-dried, ironed and used, and mostly by North American, European and Japanese consumers. Though many brands and retailers are already addressing their carbon footprint, the world is still on track to comfortably exceed 2°C temperature target and more needs to be done to reverse global emissions.

We still need more public understanding of fashion's footprint and what goes into the products we wear.

LOSS OF CULTURE AND SKILLS

Artisanal, heritage craft industries have been eroded, due in large part to mass manufacturing and also as a result of second-hand clothes flooding local markets. We risk losing ancient techniques that have been passed down through generations in communities around the world.

Millions of people in the developing world, mainly women, depend on the handicraft trade. Behind agriculture, artisan activity is the second largest employer in the developing world and accounts for 56% of the market for heritage craft (Alliance for Artisan Enterprise 2015). It is almost impossible to measure exactly how many artisans make a living through their craft because of a lack of reliable data and problems in defining what makes craft an occupation.

But right now, artisan trade faces an uncertain future. In the 1950s, Italy was home to four million tailors. Today, this figure has plummeted to 700,000. A defining part of Italy's artistic heritage risks extinction (DW.com, June 2013). Pascal Bourdariat, the director of French high-end jeweller Chaumet, estimates the number of craftspeople making luxury jewellery in Paris has halved over the past two decades. A few hundred years ago, thousands of people were making traditional kimonos – but today, there are only three families left in Japan who can do this work. In the United Kingdom, there is only one denim maker and one clog maker left (Heritage Crafts Association 2014).

We need to put great value on these dying crafts and do more to utilise and celebrate these time honoured traditions and unique techniques.

OVERCONSUMPTION

Not only has production moved mass-market but the way we consume clothing has changed a lot over the past 20–30 years too. We buy more clothes than we used to and spend less on them. A century ago, we spent more than half our money on food and clothes, today we spend less than a fifth. (The Atlantic, 2012).

Yet as a society we purchase 400% more clothing today than we did just 20 years ago (Forbes, 2014). Today over 80 billion garments are produced each year (Greenpeace). The average American buys 64 items of clothing a year. In the UK alone 2.15 million tonnes of clothing and shoes are bought every year (University of Cambridge, 2006) yet UK citizens have an estimated £30 billion worth of unused clothing sitting in their closets (WRAP, 2012).

Today, the seasonal calendar has been dramatically sped up. For decades, fashion collections were produced twice a year: Spring/Summer and Autumn/Winter. Now we have resort or cruise collections and pre-collections aiming to cash in on a growing global wealthy class. On the high street, new collections now hit the shelves every week or two.

We've come to a point where the fashion industry works on a relentless drive for speed and with it comes mounting waste and overconsumption. Clothing typically stays on the racks fewer than 12 weeks before being marked down on clearance. Designer Carrie Parry tells The Guardian: "Shoppers have become so accustomed to these markdowns that it's creating a vicious cycle of overconsumption, paired with lower margins for both brands and retailers as they find themselves saddled with overstock and forced to discount slow-selling merchandise."

Yet none of this reflects the true cost of fashion. Countless reports have indicated that the cost of labour is now rising in China, the world's biggest apparel and textiles producer. Cotton prices are also on the rise. The costs of fertilisers and farm machinery are rising too. The chemicals used in dyes and other treatments used for fashion products are getting more expensive too. Yet what we pay for clothing is still cheaper than ever. It begs us to ask why. Who is getting squeezed?

TRANSPARENCY & TRACEABILITY

So much is hidden within the fashion industry, largely because of its scale and complexity. The public does not have a clear picture of how it all really works, from fibre through to final product and what happens to our clothes when we get rid of them.

In its biennial "Behind the Barcode" report, Baptist World Aid Australia analysed the practices of 219 fashion brands selling clothing to the Australian market and discovered that only 20% publicly disclose their direct, first tier suppliers. First-tier means the factories that do the cutting, making and trimming (CMT).

Only half of the brands keep track of all their CMT suppliers. Even when companies have a direct relationship with its CMT suppliers, they are often less clear about whether these suppliers are contracting production out to other factories.

Only 25% of these brands know where their other inputs are coming from – fabric, zippers, thread (the second tier). And only 9% bother tracing their products right down to the raw material.

The brands that neither publish the name of their suppliers or their country of origin included: Lacoste and Quicksilver. Companies that publish or partially publish the countries where their suppliers are based but no company names included: Abercrombie & Fitch, Zara and Gap. Companies that both provide public lists of countries and the names of their first tier CMT suppliers include: H&M, Adidas, Levi Strauss and Patagonia.

The Feel Good Fashion Report from Rank a Brand (2014) analysed another 350 of the most popular fashion brands in the German and Dutch markets and found that only 7% published a list of their CMT suppliers.

We did some further investigating to see what information brands share publicly. The short answer: not much! Amongst the ten largest apparel companies in the world, only three (Nike, Adidas and H&M) publish a full list of their direct suppliers and only Adidas and H&M publish their known subcontractors. Uniqlo provides a partial listing

of their CMT suppliers and Zara (owned by Inditex) provides information on the location of its suppliers but no factory names. The rest do not provide any further information about their suppliers.

When we looked at other well-known brands, very few are disclosing a list of their suppliers. However there are a few commendable exceptions. In addition to name and country, Levi's gives the address along with name to its long list of factory partners. Nike discloses the address, number of workers, percentage of female workers and migrant workers and in some cases contact details to the supplier. Adidas has published special factory lists for major sporting events, such as the 2014 FIFA World Cup in Brazil, where trade union representation and Collective Bargaining Agreements are displayed. Patagonia discloses brief information on each of its suppliers, including number of workers, gender mix, when the company started working with which factory, and efforts for improving social and environmental responsibility. G Star publishes a manufacturing map, which includes the name of their first tier factories, address, number of workers, products they make for G Star, when G Star started working with the factory, the gender balance of workers and a small photo of the facility.

Most fashion companies now monitor and audit the factories they work with. However, very few publish the results of that monitoring and auditing, information that would provide an insight into what fashion's factories really look like. H&M publishes a list of the average compliance level among all audited and approved first tier factories they work with in each region. Nike and Adidas gives some statistics on their auditing results, available in their annual sustainability report. Lululemon discloses the company's environmental footprints (carbon, water, materials, transportation, waste). Gap provides an impressive amount of information publicly about their supply chain auditing results, including the methodology, factory ratings comparisons, non-compliances by region and carbon reporting results but it doesn't seem to be updated regularly.

Among the top ten apparel companies, five (Nike, H&M, Uniqlo, Adidas, and Hugo Boss) publish an annual sustainability/CSR report; however, most of them reveal little on the social and environmental impact further down the tiers of the supply chain.

We need more transparency from the fashion industry. Transparency involves openness, communication and accountability.

H&M is working to expand reporting to their second tier suppliers. Outside the top ten list, a few companies (e.g. C&A, Topshop, Calvin Klein) publish annual sustainability/CSR reports, but the lion's share of the market does not publish reports or communicate any other relevant information about the company's social and environmental impact.

There are thousands of brands and other fashion companies selling clothing worldwide that do not face the same public scrutiny for their social and environmental records. The low or non-existent level of visibility across the supply chain highlights the problematic and complex nature of the fashion industry. A few brands have received a lot of public pressure to publish information about their suppliers and some have responded by disclosing parts of it. Yet, the rest of the industry remains very opaque.

None of the largest luxury brands (e.g. brands like Chanel, Stella McCartney, Louis Vuitton and Dior), of which many are grouped under the same owner (e.g. Kering, LVMH, Gucci), disclose the name or location of their suppliers.

It's not just brands. It's the myriad other companies along the supply chain too. Private labels (suppliers selling finished products to other brands) are virtually invisible to consumers. Your common shopper has no knowledge that this part of the supply chain exists – and this is a very important and profitable part of the industry. These companies are responsible for a huge amount of what we buy on the high street – Li & Fung is a £13 billion global sourcing firm that supplies 40% of all apparel sold in the U.S.

We looked at seven prominent private label companies working in textiles and garments (Li & Fung, The Supply System, Zegna, HRX, FreeCultr, Zovi, La Isla Fashion Group) and not one of them publishes a list of their suppliers or vendors, nor do any of them publish social and environmental sustainability related reports.

Taking on more responsibility and more accountability is the only way to ensure that a company – in whatever part of the industry it works – is having a positive social and environmental impact. This strengthens the call for regulating the fashion industry. We cannot simply rely on voluntary Corporate Social Responsibility policy as a driver of change. We will talk more about the role of policymakers later in this report.

We need more transparency from the fashion industry. Transparency involves openness, communication and accountability. Transparency means operating in such a way that it is easy for others to see what actions are performed. Transparency is a means of holding people and businesses to account. It is an approach to doing business and a professional behaviour. Transparency is a means to a better industry, not an end itself. This is what Fashion Revolution means when we talk about transparency for the fashion industry.

MINDSET: *SHIFTING THE WAY WE THINK ABOUT FASHION*

Public trust in brands is in crisis at the moment. This has been spurred on by major events like the 2008 financial crisis and its subsequent ripple effects, the Rana Plaza factory collapse, the angora fur scandal, the horse meat scandal, FIFA corruption - to name a few.

Havas Media's Meaningful Brands report (2015) interviewed 300,000 people across 34 countries about their attitudes and behaviours when it comes to over 1,000 brands in 12 countries. The research showed one big thing: for the most part, consumers are now sceptics. People want to know that we're not getting a bad deal, whether it's value for money, quality, utility or the ethics of products we buy from brands. Shoppers want a good price and convenience but we also want authenticity and provenance.

People expect that business exists to serve society: on an individual and collective level. People expect brands to help make our daily routines easier – by helping us stay healthy, by better connecting us to our loved ones and by helping us make informed, smart decisions. But we expect brands to play bigger roles in our communities too – through event sponsorships or social impact initiatives that help support our collective wellbeing. Individual value at the expense of society or the environment is increasingly seen as an empty trade-off.

According to the annual BrandZ report (2014), consumers in all regions of the world say that it is important that companies act ethically.

In fact, the 2012 Edelman Good Purpose report surveyed 8,000 consumers in 16 countries and found that 80% of Chinese respondents and 71% of Indian respondents are willing to pay a premium for brands with a social or environmental commitment, compared to just 28% in UK and 40% globally saying they'd be happy to pay more. But things are beginning to change in the UK and Europe and indeed around the world. In the past two years, Fashion Revolution has seen hundreds of thousands of people take to the Internet to try to discover the hidden supply chain behind clothing.

While the average shopper may not yet be invested all the detail behind a product, mindsets are beginning to shift. Even in the luxury world, shoppers have become more discerning, appreciating luxury goods for the design and craftsmanship rather than as ostentatious display to demonstrate status.

We want to trust that what we buy was not made at the expense of someone's life or by trashing the environment. We want to trust that brands are doing business in an ethical and sustainable way. We want to trust too that governments are making sure that business is accountable, wherever they do business.

However, at present, there is very little transparent, credible or reliable information available to the public about what we buy. Fashion Revolution is rallying people worldwide to demand that there is better access to information about how companies operate and how things are made, where and by whom. We exist to catalyse the debate around public trust in the fashion industry and its many players.

MILLENNIALS WILL DRIVE CHANGE

We believe it is the millennial generation that is driving this shift in thinking. McKinsey (2013) estimates that millennials will account for one-third of total global spending by 2020 and already account for one quarter of the U.S. population who together wield about \$200 billion buying power. Although millennials (those age 17-34) will soon be the largest consumer generation in history (Advertising Age,) young people have a different outlook than previous generations. Elite Daily interviewed 1,300 millennials and 75% said that it's either fairly or very important that a company gives back to society instead of just making a profit.

Jamie Gailewicz wrote in The Next Web (29 March 2014): "millennials are children of the '80s and '90s—most becoming aware of their impact on society in the late '80s through the early '90s. They learned about responsibility to the environment, tolerance and acceptance of others, and that an individual can make a difference. Millennials are the recycling generation, raised on the idea that sorting garbage minimizes waste. They learned about global warming and how dependency on fossil fuels can have a dire effect on the world. They were taught to be conscientious of what they consume and how they live in a way that generations before them were not."

Millennials are a technology-driven generation. Social media is an integral part of their everyday life. Mobile phones and Internet access lets information travel faster than ever before. The digital space allows for people to be more engaged with brands and governments alike. Technology makes it possible for more voices to be heard. Fashion Revolution is tapping into this, using the power of the Internet to change more mindsets, to ask questions, to debate the issues, to demand more transparency about the products we buy.

Technology makes it possible for more voices to be heard.



WHO MADE MY CLOTHES? *THE FOCUS THROUGH 2020*

For the next five years, "Who Made My Clothes?" will be the question we are seeking to answer. This question will form the basis for all that we do as a platform and community.

We believe that greater supply chain transparency will help to uncover human and environmental abuses and that these exploitative practices will diminish as a result. However, we do recognise that transparency is not enough on its own to totally transform the industry. Transparency is the beginning of the process of revolutionising fashion.

Any information brands, retailers, suppliers, governments, multi-stakeholder organisations can share with the public about the way that fashion is made will be applauded and celebrated. And we'll keep pushing for more and more information right through to the very seed of materials so that some day we will have complete awareness of what we are buying. The "Who Made My Clothes?" question will help us get there.

We will be encouraging as many people as possible to ask this question as often as possible but particularly on Fashion Revolution Day, which takes place on 24 April each year to mark the anniversary of the Rana Plaza factory collapse, to remember the victims, to put the spotlight on the exploitative issues behind the fashion industry, to catalyse a global conversation and to celebrate good practices – both online and off.

We believe this simple question gets people thinking differently about what they wear. We need to know that as consumers, our questions, our voices, our shopping habits can have the power to help change things for the better.

Consumers want and deserve to know who makes our clothes and how, so that no one is unintentionally aiding and abetting dubious practices and contributing to a future that is bad for people and planet.

We believe this simple question also has the power to push the industry to be more transparent. If brands and retailers are encouraged to answer this question, they must take a closer look at their supply chain.

Transparency is the beginning of the process of revolutionising fashion.

If people become more aware and more active about the stories behind our clothing, then all the good work that is already being done across the industry to improve conditions for producers and for the environment will have more impact too. That is our aim.

OUR THEORY OF CHANGE

OUR BELIEF IS	We believe in a fashion industry that values people, the environment, creativity and profit in equal measure		
OUR ASPIRATION IS	To unite the fashion industry and ignite a revolution to radically change the way our clothes are sourced, produced and purchased		
OUR MOTIVATION WHY WE DO WHAT WE DO	We can't bear the opaqueness, exploitation and environmental damage of the industry we love	We believe that strong collaboration from farmer, to consumers is the only way to make change	We know that everyone who loves fashion can really make a difference
OUR MISSION IS	To bring everyone together to make that happen		
OUR LEVERS OF CHANGE	<ul style="list-style-type: none"> – Millions of fashion lovers worldwide – Fashion Change-makers and influencers – Fashion Brands and Retailers – Producers / Suppliers – Governments / Policy-Makers 		
OUR IMPACT IS	Fashion Industry-wide transparency becomes a normal part of doing business and contributes towards a safer, cleaner and fairer future for fashion		
WHICH REQUIRES THAT	<ul style="list-style-type: none"> – Increased Citizens activism and involvement through 'Who Made My Clothes?' and other initiatives – Increased Citizen demand for sustainably produced fashion – Fashion change-makers and Influencers support 'Who Made My Clothes?' and sustainable fashion – Increase in brands / retailers publishing factory lists and tiers – Increase in fashion 'revolutionary' brands / retailers (better business practices) – Improved Producer / supplier visibility (through brand labeling and story-telling) 		
HOW WE WILL WORK TO ACHIEVE THIS	ADVOCATE <ul style="list-style-type: none"> – Influence consumers – Influence change-makers – Influence industry – Influence government 	EDUCATE <ul style="list-style-type: none"> – Build knowledge – Gather evidence – Share (e.g. Transparency Index) 	COLLABORATE <ul style="list-style-type: none"> – Communicate and convene – Build the Fashion Revolution platform – Events / media
OUR CURRENT ACTIVITIES	<ul style="list-style-type: none"> – Fashion Revolution Day: mass activation of millions of consumers – Creation of Media, events, campaigns to build awareness, activism and action – Collaboration and engagement with other 'revolutionaries' – Policy Advocacy across the Industry and Government 		

WHAT FASHION REVOLUTION DOES

From now until 2020, Fashion Revolution will work to:

VOICE

Mobilise citizens around the world to demand a cleaner, safer, more fair, transparent and accountable industry;

CONNECT

Rebuild the disconnected relationships along the value chain, from producer to consumer so that we develop a more meaningful relationship with our clothing and so that producers become more visible and empowered;

SUPPORT

Encourage brands and retailers to be more accountable for their fashion supply chains by building evidence that transparency is good for business;

CAMPAIGN

Influence policy makers in order to ensure we see global supply chain transparency and responsibility in the fashion and textiles industry in practice, not just principle.

These are the kinds of actions we'll be encouraging brands, retailers, suppliers, factories, wholesalers and others to do:

- Operationalise an ethical code of conduct, make these social and environmental commitments clear to the public;
- Monitor, evaluate and report on social and environmental impact across the supply chain and make available to the public;
- Publish supply chain information publicly: factory lists, supplier and vendor lists across the tiers, name and contact details of suppliers, compliance, social and environmental audit results as well as remediation activities and corrective action plan results;
- A map of the supply chain and tracing products right through to farmer level, made available to the public;
- Share photos and stories from across the supply chain – farmers through to garment workers and other types of makers;
- Report publicly about wages in the supply chain, where, what factories or how many workers are guaranteed to be paid a living wage;
- Increased cost transparency, help consumers better understand where their money is going

At the policy level, we will be working with governments and policy makers to:

- Encourage social dialogue, collaboration and real tangible action on human rights and environmental degradation in the fashion and textiles industry. We want to see global supply chain transparency and responsibility on the government's agenda in every country where Fashion Revolution has a presence;
- Begin to require proper due diligence on human rights and environmental protection, not just guidance or voluntary standards;
- Press for greater public access to information about supply chains and the way fashion products are sourced, produced, consumed and disposed of.



Photography: (top) Joan Subirats, (centre) Brooke McEver, (bottom) 'The Social Experiment' by BBDO Berlin & Unit 9

WHAT MAKES FASHION REVOLUTION UNIQUE?

Fashion Revolution is a platform, both online and on the ground. We believe that the power of the Internet and digital technology will help us to reach more people, to engage them in new ways, to amplify their voices and to ignite the revolution that will change the way fashion is sourced, produced and consumed.

On social media, we have already built a large, growing and engaged audience. The [#whomademyclothes](#) hashtag campaign has proven hugely popular. On Fashion Revolution Day 2014 and 2015, the hashtag trended at number one on Twitter globally. In April 2015 alone the [#whomademyclothes](#) was used by 64 million people on Twitter and Instagram reaching 124 million impressions in total. The overall estimated online media reach was 16.5 billion – that is how many times content about Fashion Revolution was seen during April 2015.

Fashion Revolution uses good design, interesting video, beautiful imagery, clever messaging and creative stunts to engage people with the issues, especially the tech savvy millennials. We believe this is the unique strength of Fashion Revolution. Where other campaigns have made huge in-roads in improving social and environmental conditions in the industry, much of the public remains disengaged with the issues.

The digital world will continue to be an important part of our activities. Social media will continue to be a fundamental tool for discussing, connecting, campaigning and working together. We will continue to organise events from catwalk shows to film screenings and lectures to parties and plays. We will constantly be looking for new ways to talk about the issues, whether that's online or off.

We will also continually be looking to find out what information the public wants to know about clothing – so that brands, governments and organisations can understand what they should be communicating to their customers and constituents. We will use social media as one of our key tools to gather this evidence over the next five years.

For the next five years, Fashion Revolution will continue to engage citizens in the following ways:

- Encouraging people to ask “who made my clothes?” to brands, retailers, governments and policy makers and across the supply chain, from farm level to shop floor
- Encouraging farmers, producers, makers and workers to step forward, tell their stories and make their voices heard
- By making transparency and sustainability ‘cool’ through creative online and offline content, events and stunts
- By engaging celebrities, influencers, media and journalists, fashion icons around the world
- By engaging young people through schools, social media, shops and other social places

AREAS FOR FURTHER RESEARCH & THOUGHT

CONSUMER RESEARCH AND DEMAND

We would like to look at ways to better gauge what the public understands about the industry, what expectations we have about the products they buy, and what information the public wants to know about brands and products. We could look at further ways to catalyse consumer demand for fashion made in a sustainable and ethical manner, this might involve further tapping into new media, digital marketing and other creative projects that reach consumers.

POLICY & LEGISLATION

Fashion Revolution is already part of stakeholder groups with the UK government, the European Union and the G7. Fashion Revolution has gained support from policy makers in other countries from Finland to Bangladesh. We might look further at how citizens can influence policy-making and legislation on these issues and how we might engage more support from policy-makers in these constituencies and in more countries.

THE BUSINESS CASE FOR TRANSPARENCY & SUSTAINABILITY

As Fashion Revolution has already reached so many people, we might look at better ways of gathering examples of best practice across the industry, helping to show the industry what transparency might look like in practice and to educate consumers about what makes a ‘good’ fashion company.

HOW WE CAN BETTER ENGAGE FARMERS, PRODUCERS, WORKERS AND MAKERS

the people working in supply chains are the least visible. We might look at further ways we can highlight, celebrate and hear from producers about their lives and work. We could consider looking at ways to better connect the people who make fashion with the people who buy it.

AMPLIFYING AND SUPPORTING THE WORK OF OTHER CAMPAIGNS AND NGOS

Fashion Revolution does not want to replicate the good work that many other organisations (eg. Clean Clothes Campaign, Greenpeace, IndustriALL, Labour Behind the Label and many others) are doing to raise awareness and improve human rights and environmental impacts across the fashion and textiles industry. In fact, we hope to bring more public awareness and demand for what they do. In future, we would like to find ways that we can use public power to help to achieve the aims and mission of other related campaigns and initiatives.

FINAL WORDS...

From human rights abuses and poverty level wages to water, waste, energy, overconsumption and many other exploitative practices, the fashion industry is in desperate need for transformational, systemic change.

This is why two years ago, just after the collapse of Rana Plaza, thousands of people in dozens of countries got together to turn the fashion industry inside out, sparking the Fashion Revolution. The public wants to be able to trust that what they purchase has made a positive contribution to society.

Whether you are someone who buys and wears fashion (that's pretty much everyone) or you work in the industry along the supply chain somewhere or if you're a policymaker who can have an impact on legal requirements, you are accountable for the impact fashion has on people's lives and on nature.

Fashion Revolution will continue to work towards a future where fashion is an industry that values the environment, people, profit and creativity in equal measure. We hope you will join us, whoever you are. We will work to support you to be able to make a positive change.

Let's start by asking the "Who Made My Clothes?" question. Ask yourself. Ask the brands and retailers you shop from. Ask the NGOs and trade unions. Ask the factories and suppliers. Ask your government and policy makers. Ask makers, producers and the workers themselves. Ask everyone you can.

We hope that by 2020 the public starts getting some real answers to this question. We hope to see thousands of brands and retailers willing and able to tell the public about the people who make their products. We hope to see makers, producers and workers become visible; we hope to see thousands of their stories told. We hope to start to see more consumer demand for fashion made in a sustainable, ethical way. We hope that we start to see real transformative positive change begin to take root.

We hope that we can start to see real transformative positive change.

APPENDIX: ORGANISATIONS & CAMPAIGNS TO CHECK OUT

Alliance for Artisan Enterprise
allianceforartisanenterprise.org

Anti-Slavery International
antislavery.org

Better Work
betterwork.org

Centre for Sustainable Fashion
sustainable-fashion.com

Clean Clothes Campaign
cleanclothes.org

Environmental Justice Foundation
ejfoundation.org

Ethical Fashion Forum
ethicalfashionforum.com

European Year for Development
europa.eu/eyd2015/en

Fairtrade International
fairtrade.org.uk
fairtrade.net

Global Organic Textile Standards (GOTS)
global-standard.org

Greenpeace Detox
greenpeace.org/detox/

IndustriALL
industriall-union.org

International Labor Rights Forum
laborrights.org

Labour Behind the Label
labourbehindthelabel.org

MISTRA Future Fashion
mistrafuturefashion.com

Pesticide Action Network UK (PAN)
pan-uk.org

Stop the Traffik
stophetraffik.org

Textile Exchange
textileexchange.org

TRAID
traid.org.uk

War on Want
waronwant.org/LFHS

WIEGO
wiego.org

World Fair Trade Organisation (WFTO)
wfto.com

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